

Angel Capital Association Northwest Regional Meeting Agenda

June 3 - 5, 2014

Location: Urban Airship/Vestas, 1417 NW Everett St., Portland, OR 97209

TUESDAY, JUNE 3RD

6:00 p.m. **Welcome Reception**, Bluehour, 250 NW 13th Ave, Portland, OR 97209

7:30 p.m. **Optional Networking Dinner (pay as you go)**, Locations TBD – Will provide ideas for area hot spot

WEDNESDAY, JUNE 4 TH	
8:15 a.m.	Conference Registration, Coffee, Continental Breakfast and Networking
8:45 a.m.	I. Welcome and ACA Update Angela Jackson, Portland Seed Fund & Sarah Dickey, Angel Capital Association
9:00 a.m.	II. Regional Angel Group Round Robin – Main Questions for Angels Each participating angel organization will provide a brief overview of their organization and a highlight/observation/concern for the year to come.
10:30 a.m.	Break
10:45 a.m.	III. Changing Landscape of Angel Deals in the Northwest Introduction Presentation: Rob Wiltbank – Update on NW Activity / Important Angel Research Panel – A topic that is pertinent to all angels is the deal flow process including valuation, terms sheets. This panel will highlight some best practices around the angel process and organization Moderator: Bill Payne, Frontier Angel Network Introduction Presentation: Rob Wiltbank, Angel Resource Institute Panelists: <ul style="list-style-type: none"> • Yi-Jian Ngo, Alliance of Angels • Phil Grimm, SLC Angels • Mark Francis, Canadian Securities Exchange
11:30 a.m.	IV. NW Syndication: How Northwest angels and groups work together and plans / experiences on syndication platforms. Moderator: Eric Rosenfeld, Oregon Angel Fund Panelists: <ul style="list-style-type: none"> • Lars Johansson, Element 8 • Kevin Learned, Boise Angel Alliance • Nada Jain, Golden Seeds • Joe Jarzembowski, Bellingham Angels

12:15 p.m.	<p>V. Lunch – Public Policy: General Solicitation, the SEC & Angels What do angels need to know about the changing national regulations and how these changes affect Northwest investments. Moderator: Linda Smith, ACA Board, Sierra Angels Panelists:</p> <ul style="list-style-type: none"> • Joe Wallin, Davis Wright Tremaine • Gary Kocher, K&L Gates • Sue Preston, Element 8
1:30 p.m.	BREAK
1:45 p.m.	<p>VI. Going From ‘Oh No’ to ‘OK’ – Experienced angels discuss lessons learned about turning bad situations around & how to avoid them through case studies. Moderator: David Forman, Tonkon Torp Panelists:</p> <ul style="list-style-type: none"> • Irving Levin, Portland Angel • Randy Thompson, Venture Alberta • Jim Huston – Portland Seed Fund • Jon Marchi – Frontier Angel Fund
2:30 p.m.	<p>VII. HOT TOPICS OF THE MOMENT: Attendees will guide this session to include the most important topics for investors. Moderators: Angela Jackson (Portland Seed Fund), Nathan McDonald (Keiretsu Seattle & Eastside), Bob Chaworth-Musters (Angel Forum – Vancouver)</p>
3:15 p.m.	<p>Driving to Exit: Case Study - Pacinian Session Introduction: Alex Modelski, Ater Wynne Presenter: Johnny Humphreys</p>
3:45 p.m.	BREAK
4:00 p.m.	<p>VIII. “Best of Region” Company Presentations Each participating angel organization will provide their current “best candidate” opportunity for syndication. ~10 minutes per company including Q&A – depending on #of companies.</p>
5:45 p.m.	Adjourn
6:00 p.m.	<p>IX. “Founders & Funders” Cocktail Reception – including entrepreneurs Cocktails and appetizers on the rooftop at Vestas, 1417 NW Everett St., Portland</p>
7:30 p.m.	<p>Dinner (additional expense) <i>Irving Street Kitchen 701 NW 13th Ave, Portland, OR 97209– Details to follow</i></p>
	THURSDAY, JUNE 5TH
8:15 a.m.	<p>I. Breakfast at Vestas</p>
9:00 a.m.	<p>II. Local Startup Showcase Attendees will have access to the best and brightest startups from the Portland area during this interactive Showcase Session Introduction: Ajay Malhotra, CBRE Portland Facilitators: Jenn Lynch, Portland Seed Fund & Scott Sandler, Oregon Angel Fund</p>

12:00 p.m.	III. Other Activities, TBD
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