



**Angel Capital Association**  
**Northwest Regional Meeting Agenda**

June 3 - 5, 2014

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

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**TUESDAY, JUNE 3<sup>RD</sup>**

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<sup>TH</sup>**

	<b>WEDNESDAY, JUNE 4<sup>TH</sup></b>
8:30 a.m.	<b>Conference Registration, Coffee, Continental Breakfast and Networking</b>
9:00 a.m.	<b>I. Welcome and ACA Update</b> Angela Jackson, Portland Seed Fund & Sarah Dickey, Angel Capital Association
9:15 a.m.	<b>II. Regional Angel Group Round Robin – Main Questions for Angels</b> 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.	<b>Break</b>
10:45 a.m.	<b>III. Changing Landscape of Angel Deals in the Northwest</b> <b>Introduction Presentation:</b> Rob Wiltbank – Update on NW Activity / Important Angel Research <b>Panel –</b> 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 <b>Moderator:</b> Bill Payne, Frontier Angel Network <b>Introduction Presentation:</b> Rob Wiltbank, Angel Resource Institute <b>Panelists:</b> <ul style="list-style-type: none"><li>• Yi-Jian Ngo, Alliance of Angels</li><li>• Phil Grimm, SLC Angels</li><li>• Mark Francis, Canadian Securities Exchange</li></ul>
11:30 a.m.	<b>IV. NW Syndication: How Northwest angels and groups work together and plans / experiences on syndication platforms.</b> <b>Moderator:</b> Eric Rosenfeld, Oregon Angel Fund <b>Panelists:</b> <ul style="list-style-type: none"><li>• Lars Johansson, Element 8</li><li>• Kevin Learned, Boise Angel Alliance</li><li>• Nada Jain, Golden Seeds</li><li>• Joe Jarzembowski, Bellingham Angels</li></ul>

12:15 p.m.	<b>V. Lunch – Public Policy: General Solicitation, the SEC &amp; Angels</b> 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: <ul style="list-style-type: none"><li>• Joe Wallin, Davis Wright Tremaine</li><li>• Gary Kocher, K&amp;L Gates</li><li>• Sue Preston, Element 8</li></ul>
1:30 p.m.	<b>BREAK</b>
1:45 p.m.	<b>VI. Going From ‘Oh No’ to ‘OK’ –</b> Experienced angels discuss lessons learned about turning bad situations around & how to avoid them through case studies. Moderator: Leon Simson, Tonkon Torp Panelists: <ul style="list-style-type: none"><li>• Irving Levin, Fluffco, Inc.</li><li>• Randy Thompson, Venture Alberta</li><li>• Jim Huston – Portland Seed Fund</li><li>• Jon Marchi – Frontier Angel Fund</li></ul>
2:30 p.m.	<b>VII. HOT TOPICS OF THE MOMENT:</b> 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)
3:15 p.m.	<b>VIII. Driving to Exit: Case Study - Pacinian</b> Session Introduction: Alex Modelski, Ater Wynne Presenter: Johnny Humphreys
3:45 p.m.	<b>BREAK</b>
4:00 p.m.	<b>IX. “Best of Region” Company Presentations</b> Each participating angel organization will provide their current “best candidate” opportunity for syndication.
5:45 p.m.	<b>Adjourn</b>
6:00 p.m.	<b>X. “Founders &amp; Funders” Cocktail Reception – including entrepreneurs</b> Cocktails and appetizers upstairs on the rooftop at Vestas, 1417 NW Everett St., Portland (This is also a great follow-up opportunity for the company presentations.)
7:30 p.m.	<b>Dinner (additional expense)</b> <i>Irving Street Kitchen 701 NW 13th Ave, Portland, OR 97209– Details to follow</i>
<b>THURSDAY, JUNE 5<sup>TH</sup></b>	
8:30 a.m.	<b>I. Breakfast at Vestas</b>
9:00 a.m.	<b>II. Local Startup Showcase</b> 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
12:00 p.m.	<b>III. Meeting Adjourns</b>