



# ANGEL CAPITAL ASSOCIATION

## 2017 ACA Leadership Workshop

### Agenda

Monday, November 13	8:00 – 8:30	<i>Registration</i>	
	8:30 – 11:30	Optional Pre-Program – Angel 101	
	11:30 – Noon	<i>Registration</i>	
	Noon – 1:30	<b>Luncheon and Keynote(s)</b> Welcome to Houston and TMCx – Erik Halvorsen, TMCx Houston’s Innovation Community - Amanda Edwards, Houston City Council New Innovation Ecosystem Leader: Houston Exponential– Dick Williams, Houston Exponential; John “JR” Reale, Station Houston; and Guillermo Borda, Mercury Fund	
	1:30 – 1:45	Break	
		<b>TRACK ONE: SEASONED ANGELS</b>	<b>TRACK TWO: LEADERS OF ANGEL GROUPS &amp; PLATFORMS</b>
	1:45 – 2:45	<b>Learning from our Failures – Based on Real Data</b> <i>John Lyn, John Paulos, Rick Timmins and Rosa McCormick, Central Texas Angel Network</i>	<b>What’s Keeping Group Managers Up at Night?</b> <b>Leaders Swap Perspectives</b> <i>Christopher Mirabile, Launchpad Venture Group</i>
	2:45 – 3:00	Break	
	3:00 – 4:00	<b>Mental Models: The Secret to Effective Due Diligence</b> <i>Mark Thorsen, Central Texas Angel Network</i> <i>Beverly Byer, CliftonLarsonAllen</i> <i>Sonia Mathur, Houston Angel Network</i> <i>Matt Todd, Polsinelli</i>	<b>How One Group Improved Its Funding Cycle with a National Survey and More</b> <i>Claire England, Central Texas Angel Network</i>
	4:00 – 4:15	Break	
	4:15 – 5:15	<b>Plenary/ Keynote - The Thriving Medical Ecosystem in Houston JLABs – Dr. Billy Cohn</b> <b>ACA’s New Strategic Initiatives: New Services for Members – Tony Shipley, ACA Vice Chair</b>	
	5:15 – 7:00	<b>Networking Reception</b> <i>Leaders of the Houston and Texas innovation ecosystem will join ACA members</i>	
	7:00 on	<b>Informal Dinners (on your own)</b> Invite your colleagues to join you for dinner at one of several restaurants in the area.	
Tuesday, November 14	7:30	<i>Registration and Sponsor Exhibits</i>	
	8:00 – 9:15	<b>Breakfast and Plenary/Keynote</b> <b>How to Pull Together a Regional Umbrella Angel Network</b> <i>Alliance of Texas Angel Networks Members Jamie Rhodes, Jorge Varela, Laurie Simmons, Ryan Reber</i> <b>ACA Activities: The American Angel Report and Capitol Hill Update</b> <i>Elaine Bolle, RTP Capital Partners</i> <i>Chris McCannell, Eris Group</i>	
	9:15 – 9:30	Break	
		<b>TRACK ONE: SEASONED ANGELS</b>	<b>TRACK TWO: LEADERS OF ANGEL GROUPS &amp; PLATFORMS</b>
	9:30 – 10:15	<b>An M&amp;A Expert Provides Tips for Angels on Prepping Companies for Exits</b> <i>Ross Finlay, First Angel Network</i> <i>Jeff Brown, Corum Group</i>	<b>How to Build an Efficient and Effective Angel Portfolio</b> <i>Tuff Yen, Seraph Group</i> <i>Randall Foster, Seraph Group</i>
	10:15 – 10:30	Break	

10:30 – 11:15	<b>Structuring Investments for Outcomes</b> <i>Andrew Clark, Houston Angel Network</i> <i>Gene Betts, Central Texas Angel Network</i>	<b>Building Relationships with Family Offices and VCs for Follow-on Funding &amp; Exits</b> <i>Joe Milam, AngelSpan</i> <i>Hanley Sayers, III, Goldman Sachs</i> <i>David Verrill, Hub Angels Investment Group</i>
11:15 – 11:30	Break	
11:30 – 12:15	<b>To Follow-on or Not – Your Decision Template</b> <i>John Huston, Ohio TechAngel Funds</i>	<b>The Latest in Structuring Sidecar Funds</b> <i>Paul Pryzant, Houston Angel Network</i> <i>Marcia Dawood, BlueTree Allied Angels</i> <i>Brian Fenske, Norton Rose Fulbright</i> <i>Christy Luquire, Texas Halo Fund</i>
12:15 – 2:00	<b>Luncheon and Plenary/ Keynote – Houston’s Space Community and Innovations</b> <i>Vanessa Wyche, Johnson Space Center at NASA</i>	
2:00 – 3:00	<b>Plenary/ Unconference</b> <i>Bill Payne, Frontier Angels</i>	
3:00	Thanks, Next Steps and Adjournment	
3:15-4:30	Optional Impact Investing Program by Station Houston and Houston Angel Network	

**Color Code:**

Plenary

Track One:  
Seasoned Angels

Track Two:  
Leaders of Angel

Additional Events

Breaks/ Networking  
Sponsor Exhibits