

ALTERNATIVE LENDING SUMMIT 2016 | AGENDA



TUESDAY SEPTEMBER 27, 2016

6:00pm - Opening Reception
7:30pm

WEDNESDAY SEPTEMBER 28, 2016

7:00am - Registration and Breakfast
8:00am

8:15am - Opening Remarks
8:30am
Mark Salameh, CEO - Context Summits

8:30am - **Keynote: Examining Trends & Future Predictions in Alternative Lending**
9:15am
This Keynote Presentation will bring insight into the last few tumultuous months inside the Alternative Lending landscape and future predictions of what to expect over the next 3-6 months
Ron Suber, President - Prosper Marketplace

9:15am - **The Changing Dynamics of Alternative Lending Models**
10:00am
This session will take a look at some of the more popular alternative lending models and will provide a synopsis as to how each model is fairing for different asset classes given the current environment
- P2P Lending
- B2B Lending
- Invoice Trading
- Student Loans
Panelists
Paul Echausse, Managing Director - Alcentra
Paul Lisiak, Managing Partner - Metropolitan Equity Partners
Brendan Ross, CEO - Direct Lending Investments LLC
Brian Weinstein, CIO - Blue Elephant Capital Management LLC

10:00am - **Caveat Emptor: Determining the Value of a Loan in an Era of Low Transparency**
10:50am
This interactive panel will provide various perspectives in how you can determine if a loan is good. We will look provide insight into various investors valuation approaches the differing levels of transparency provided by lenders
Panelists
Ram Ahluwalia, CEO & Co-Founder - PeerIQ
Douglas Monticciolo, Chief Executive Officer, Chief Investment Officer & Founder - Brevet Capital
Brad Reifler, President & CEO - Forefront Capital
Aamir Sheikh, CEO - Echelon Asset Management

10:50am - **Networking Break**
11:15am

11:15am - **Which Allocation Vehicle is Right For Me?**
11:50am
This panel will identify various platforms' business models and strategies that drive the deals they fund. We will examine perspectives as to whether it's best to invest directly through a platform or through an investor investing in platforms. The panel will also address the considerations when determining how to allocate - Risk vs. Return; Invest Direct or Asset Manager; Securitization vs. 40x Fund, etc.
Panelists
Paul Deitch, CEO - Patch of Land
Peter Sterling, Portfolio Manager, Direct Yield Fund - Coastland Capital
Jeremy Todd, Director of West Coast Sales - Orchard Platform

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WEDNESDAY SEPTEMBER 28, 2016 (CONT'D)

11:50am - 12:25pm - **The Evolving Relationship Between Traditional Financial Institutions and Alternative Finance Companies**

This session will take a look at the relationship of traditional banks and lenders and alternative lenders and how creating a partnership is the key to success and could lead to growth in the US economy

Panelists

Jason Drattell, Managing Partner - Praesidian Capital

Craig Schleicher, Manager, Consumer Finance Group - PwC

Mark Simmer, Managing Director - Macquarie

Tingting Zhang, President & Portfolio Manager - The TerraCotta Group, LLC

12:25pm - 1:30pm

Lunch



1:30pm - 2:15pm - **What Went Wrong: An Examination of Past Mishaps in Alternative Lending**

This interactive panel discussion will take a look at some of the mishaps & missteps that took place over the last year and provide various perspectives as to what went wrong and what should have been done differently to avoid these problems. This is sure to be an exciting and interesting look into the past year

Panelists

David Aviram, Principal - Maverick Real Estate Partners LLC

Don Davis, Managing Partner - Prime Meridian Capital Management

Damon Krytzer, Managing Director - GreyWolf Capital Management

Alan Snyder, Managing General Partner - Shinnecock Partners

2:15pm - 3:00pm - **Understanding the Regulatory & Tax Environment Affecting Alternative Lending**

This discussion-based session will provide insight into the current regulatory, tax and legal environment of alternative lending and will offer predictions into future changes particularly as we approach a Presidential election.

Panelists

Nav Athwal, Founder and CEO - RealtyShares

Jor Law, Co-Founder - VerifyInvestor.com & Homeier Law PC

Howard Schickler, Partner - Katten Muchin Rosenman LLP

Thomas Wiese, Senior Managing Director - Lombard International

3:00pm - 3:30pm - **Networking Break**

3:30pm - 4:15pm - **The Investor Perspective: Should You Invest in the Platforms, Take a Direct Position or a Securitized Bundle of P2P Loans?**

This panel will present an investor perspective to the industry and various categories and strategies available

Panelists

Sean Bill, Investment Program Manager - VTA

James Egan, VP Research & Strategy - Evolution Capital Management

Clay Smudsky, Managing Director - Social Finance, Inc.

Frank Turner, Portfolio Manager - MIG Capital

4:15pm - 5:00pm - **Small Business Lending of the Future**

This panel will explain why small businesses are underfunded and will quantify the market opportunity for alternative lenders. We will also take a quick look at the future of small business crowdfunding and other SMB lending alternatives. Presenters will also take a look at the growth factors and the pain points limiting their growth as well as key risks that could undermine the success of alternative platforms

Panelists

Brock Blake, CEO - Lendio

Jacob Haar, Manager Partner - Community Investment Management

Albert Periu, Global Co-Head of Capital Markets - Funding Circle

Stephen Sheinbaum, Founder - Bizfi

5:00pm - 6:30pm - **Networking & Cocktails**