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**JUNE 27, 2023
12:00 PM**

**AC HOTEL
110 N. TRACY AVE.
BOZEMAN, MT**

11:30 AM—CHECK IN

12:00 PM—LUNCH/WELCOME

Commissioner Troy Downing & Deputy Securities Commissioner Brett Olin welcome you to an afternoon of learning about investment opportunities in our great state, from angel funds and public companies. You will hear first-hand success stories from Montana companies and develop an understanding of the regulatory framework surrounding capital formation. Remember, doing things the right way protects not only your interests, but also the investor.

1:00 PM—BUSINESS MODELS & NETWORKS PANEL

This panel will look at a variety of models for raising capital with various levels of investor involvement. The panel will assist persons with big ideas explore which framework is best for them and their investors.

- Moderator—Ole Olson, CSI Chief Legal
- Brent Donnelly—District Director, US Small Business Administration
- Tracy McIntyre—Executive Director, Montana Cooperative Development Center
- Todd O’Hair—President & CEO, Montana Chamber of Commerce
- Liane Taylor—Administrator, Business MT Division, Montana Department of Commerce
- Mitch Staley—Communications Director, Montana Department of Commerce

2:00 PM—SMALL BUSINESS & STARTUP EXPERIENCES

We will hear from various businesses about their startup experience, including where to focus energy, find appropriate investors, and hurdles they had to overcome.

- Moderator—Commissioner Troy Downing
- Chad Zeitner—CEO/Co-Founder, Montucky Cold Snacks
- Mark Ranalli—President & CEO, BioSqueeze, Inc.
- Cole Mannix—President, Old Salt Co-Op
- Kelli Schermerhorn—Vice President, Butte Food Co-Op BOD

3:00 PM—CAPITAL FORMATION FROM A LEGAL PERSPECTIVE (1 CLE)

National and local attorneys will discuss the legal landscape for startup companies and raising capital for existing companies looking to expand. They will also focus on disclosure obligations, with special attention to what investors should be looking for before committing funds to a young company. They will also discuss issues regarding Funds.

- Moderator—Deputy Securities Commissioner Brett Olin
- Ronak Patel—Principal Attorney, Bressler, Amery & Ross
- Erin McCrady—Attorney, Dorsey & Whitney

4:00 PM—PRIVATE EQUITY

Angel fund managers and private equity investors detail what engages them in a new offering or doubling down on an existing opportunity.

- Moderators—Karl Unterschuetz, Outreach & Engagment Manager, Accelerate Montana
Dr. Jennifer Isern, CFA/CEO, Catalyze Global Impact, LLC
- Philip Brittan—Vice President, Google
- Graham Conran—Executive Director, Frontier Angels
- Liz Marchi—Head of Community Engagement, Two Bear Capital
- Les Craig—General Partner, Next Frontier Capital

5:00 PM—CLOSING REMARKS

5:30 PM—HOSTED SOCIAL HOUR AT AC HOTEL ROOFTOP BAR

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