

Note that meeting times/locations are subject to change; check www.financialexecutives.org/Austin for the latest information.

July 2017

- 20 **Members and Sponsors Only
Happy Hour** (*By invitation only*)

August 2017

- 15 **Amy Simmons, Founder & CEO
Amy's Ice Creams, Inc.**
**"Open Book Management and the Meaning of
Business Financial Fluency for the Next
Generation"**
Dinner Meeting/Hotel Granduca
 5:30 p.m. Cocktails and Networking
 7:00 p.m. Presentation

September 2017

- 19 **Kelly Landreth, Managing Director, Regional
Investment Banking and
Paul Wolfert, VP – Investment Banking
Wells Fargo Securities**
"State of the M&A and Capital Markets"
Breakfast Meeting/Renaissance Hotel
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

October 2017

- 17 **Greylen Erlacher Mardy, VP, Vanbridge LLC and
Jennifer Smith, Partner, DLA Piper**
**"Transactional Risk Insurance:
A Risk Transfer Mechanism"**
Breakfast Meeting/Renaissance Hotel
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

November 2017

- 21 **Rajiv Bala, Principal, S3 Ventures; Clayton
Christopher, Co-Founder & Managing Partner,
CAVU Venture Partners; and Venu Shamapant,
General Partner, Live Oak Venture Partners;
Pete Pearson, Director of Startup Services,
Bridgepoint Consulting (Mod.)**
"Current State of the VC Market"
Breakfast Meeting/Austin Country Club
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

December 2017

- 5 **Members and Sponsors Holiday Party**
By invitation only

January 2018

- 16 **Annual Accounting Update**
**Sara Maxwell, Audit Partner; Lesley Hargraves,
Audit Partner; and Anna Stepan, Tax Partner,
Maxwell Locke & Ritter**
Breakfast Meeting/Austin Country Club
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

February 2018

- 20 **Justin Foster, Co-Founder, root + river**
"Brand: The Next Great Leadership Discipline"
Breakfast Meeting/Austin Country Club
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

March 2018

- 20 **Johnny Heiselberg, CEO, Austin Eastciders**
"Navigating High Growth is All About People"
Dinner Meeting/Archer Hotel
 5:30 p.m. Cocktails and Networking
 7:00 p.m. Presentation

April 2018

- 17 **Robert Lynch, Principal, Burst Consulting**
**"Are You Achieving Industry-Leading
Profitability?"**
Breakfast Meeting/Austin Country Club
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

May 2018

- 15 **Nate Paul, President & CEO,
World Class Capital Group**
"Commercial Property Market Overview"
Breakfast Meeting/Westwood Country Club
 7:30 a.m. Registration and Breakfast
 8:00 a.m. Presentation

June 2018

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M&A Panel Event

John Biggs, Managing Director, *Focus Strategies Investment Banking* (Introduction)

Gary Valdez, President, *Focus Strategies Investment Banking* (Moderator)

Panelists:

Larry Hester, Managing Director, *Focus Strategies Investment Banking*

Jon Rausch, Partner, *Holtzman Partners*

Jack Selman, President, *Selman Munson & Lerner, P.C.*

Breakfast Meeting/Austin Country Club

7:30 a.m. Registration and Breakfast

8:00 a.m. Presentation