



MOVING FORWARD

Sonesta Charlotte Executive Park

2021 ANNUAL CONFERENCE

WEDNESDAY, 9/22/21

12:00 - 1:00PM	Registration
1:00 - 5:00PM	IBBA Course #204: Effective Deal Team Mgmt: Working Together to Close More Deals - Roman Basi
5:00 - 6:00PM	CVBBA Board Meeting
6:00 - 8:30PM	CVBBA Welcoming Reception and Networking Event - Sponsored by Diamond Financial Services

THURSDAY, 9/23/21

6:30 - 8:00AM	Continental Breakfast/Registration - Sponsored by First National Bank
8:00 - 8:30AM	Welcome and Opening Remarks - Adam Petricoff/Board
8:30 - 8:45AM	Legislative Update - Steve Mariani
8:45 - 10:30AM	Three Keynote Topics 1) How Potential Tax Changes will Impact Deals - Roman Basi 2) Utilizing Technology in Your Practice - Ron West 3) Valuations in Today's World - Darren Mize
10:30 - 11:15AM	Break with Sponsors
11:15 - 12:00PM	Workshops Rotation
Two back-to-back 20 minute rounds with a 5 minute break in between. Round 1: 11:15 - 11:35 Round 2: 11:40 - 12:00	Workshop 1 - Best Practices: Communicating With Clients: During and After the Engagement Tully Ryan Workshop 2 - Best Practices: Handling WIP and Gift Cards - Steve Mariani <i>(Each Workshop will be repeated for each Round)</i>
12:00 - 1:00PM	Lunch - Sponsored by Customers Bank
1:00 - 2:00PM	Best Practices: The Seller Interview - Jay Offerdahl
2:00 - 2:15PM	Break
2:15 - 3:55PM	Workshops Rotation
Three back-to-back 30 minute rounds with a 5 minute break in between. Round 1: 2:15 - 2:45 Round 2: 2:50 - 3:20 Round 3: 3:25 - 3:55	Workshop 1 - Growing Your Practice: Hiring, Training and Retaining Your Team - JT Tatem, Dustin Zeher Workshop 2 - Best Practices: Using a Data Room in Your Transactions - Adam Petricoff, Matt Bradbury Workshop 3 - Best Practices: Using a CRM to Manage Your Business - Neal Isaacs <i>(Each Workshop will be repeated for each Round)</i>
3:55 - 4:30PM	Break with Sponsors
4:30 - 5:30PM	From LOI to Closing - a Bankers Perspective: What Brokers Can Do to Get More Deals Done, Quicker! - TBD
5:45 - 7:30PM	Networking Reception, Dinner and Drinks - Sponsored by Live Oak Bank

FRIDAY, 9/24/21

6:45 - 8:00AM	Breakfast with Sponsors - Sponsored by Nexsen Pruet
8:00 - 9:00AM	Legal Deal Killers and How to Avoid Them - TBD
9:00 - 9:30AM	Open need to fill
9:30 - 12:10PM	Workshops Rotation
Three back-to-back 50 minute rounds with a 5 minute break in between. Round 1: 9:30 - 10:20 Round 2: 10:25 - 11:15 Round 3: 11:20 - 12:10	Workshop 1 - Best Practices: Evolving Your Practice & Moving Up Market - Matt Bradbury Workshop 2 - Best Practices: Recasting Challenges - Mark Pompeo Workshop 3 - Getting New Engagements in a Post-Covid World; What is Working NOW? - Mike Metzger <i>(Each Workshop will be repeated for each Round)</i>
12:10 - 12:20PM	Attendees grab box lunch - Sponsored by Aquesta Bank
12:20 - 1:30PM	Moving toward a CVBBA MLS? Presentation by Adam Petricoff, Joe Santora, Jim Turner
1:30PM	End of Meeting/Wrap Up/ Raffle Prizes