



# CVBBA Conference September 27-29 2023



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&  
CONQUER

Embassy Suites by Hilton,  
201 Harrison Oaks Blvd, Cary NC

## WEDNESDAY, 9/27/23

Time	Event	Location
10:00 - 5:00 PM	Registration	Entrance Area
10:00 - 4:00 PM	Broker Meetings - Franchise/Independent	Tanglewood/Pinehurst
1:00 - 5:00 PM	Optional IBBA Course #301: Intro to Mergers & Acquisitions - 4 credit hours - <b>Mike Adhikari</b>	Cape Hatteras
5:00 - 6:00 PM	CVBBA Board Meeting	Kitty Hawk
6:00 - 8:00 PM	CVBBA Welcome Reception and Dinner - Sponsored by <b>First National Bank</b>	Triangle Ballroom
8:00 - 10:00 PM	Fun Event - Game Night - It's time to show your board game skills to other brokers!	Triangle Ballroom

## THURSDAY, 9/28/23

6:30 - 8:00 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
8:00 - 8:45 AM	Welcome & Opening Remarks - <b>Rupesh Bharad</b>	Blowing Rock
8:45 - 9:15 AM	Keynote Presentation- SBA Update - <b>Allen Thomas, Regional Administrator of SBA Southeast Region</b>	Blowing Rock
9:15 - 10:00 AM	Panel - National Leaders from Franchises, IBBA - State of the Industry	Blowing Rock
10:00 - 10:30 AM	Break with Sponsors - Sponsored by <b>SouthState Bank</b>	Blowing Rock/Prefunction
10:30 - 11:30 AM	Break out #1 - Lender Selection Process-Sponsored by <b>First National Bank</b>	Tanglewood
(2 back-to back 25 minute rounds with 5 minute break)	Break out #2 - Advanced - Different Types of PE groups and How to Work with Them	Pinehurst
11:30 - 12:15 PM	<b>Mike Adhikari</b>	
12:15 - 1:15 PM	CVBBA Excellence Awards Presentation - Sponsored by <b>Davis Business Appraisers</b>	Blowing Rock
12:45 - 1:15 PM	Lunch - Sponsored by <b>Outflow</b>	Blowing Rock
1:15 - 1:45 PM	Maximizing your CVBBA/IBBA Joint Membership - <b>Kylene Golubski, Kyle Griffith</b>	Blowing Rock
1:45 - 2:15 PM	Looking Ahead to 2024 - <b>Rick Chess</b>	Blowing Rock
2:15 - 3:00 PM	Break with Sponsors	Blowing Rock/Prefunction
3:00 - 4:00 PM	Panel - Presidential Advisory Group (CVBBA Then and Now) - <b>Rupesh Bharad</b>	Blowing Rock
(2 back-to back 25 minute rounds with 5 minute break)	Break out #3 - Lead Generation Techniques - Sponsored by <b>Outflow</b>	Tanglewood
4:00 - 4:30 PM	Break out #4 - Ways to Leverage Your SBA Lender - Sponsored by <b>Live Oak Bank</b>	Pinehurst
4:30 - 5:30 PM	Break with Sponsors - Sponsored by <b>Customers Bank</b>	Blowing Rock/Prefunction
5:30 - 6:00 PM	Developing New Revenue Streams (Outside of Traditional Business Brokerage)	Blowing Rock
6:00 - 8:00 PM	Break with Sponsors	Blowing Rock/Prefunction
8:00 - 10:00 PM	Network Reception, Dinner & Drinks - Sponsored by <b>Live Oak Bank</b>	Triangle Ballroom
	Fun Event - Karaoke Night - It's time to show your singing skills to other brokers!	Triangle Ballroom

## FRIDAY, 9/29/23

7:00 - 8:30 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
8:30 - 9:30 AM	Hot Seat - Growing Your Practice - Sponsored by <b>Live Oak Bank</b>	Blowing Rock
9:30 - 10:30 AM	Break out #5 - Top 10 Legal Mistakes - Sponsored by <b>Hopler, Wilms &amp; Hanna</b>	Tanglewood
(2 back-to back 25 minute rounds with 5 minute break)	Break out #6- Tax Issues to Generate Business - Sponsored by <b>SouthState Bank</b>	Pinehurst
10:30 - 11:00 AM	Break with Sponsors - Sponsored by <b>The Bancorp</b>	Blowing Rock/Prefunction
11:00 - 12:00 PM	Break out #7 - Selling Franchise Challenges - Sponsored by <b>Customers Bank</b>	Tanglewood
(2 back-to back 25 minute rounds with 5 minute break)	Break out #8 - Advanced - Creative Financing - Sponsored by <b>The Bancorp</b>	Pinehurst
12:00 - 12:30 PM	Break with Sponsors	Blowing Rock/Prefunction
12:30 - 1:30 PM	Lunch with Committees and 15+ Raffle Prizes (must be present)	Blowing Rock
1:30 - 5:00 PM	Optional Recreational Activities - Bowling, Golfing and More!	TBD
1:30 - 5:00 PM	Broker Meetings - Franchise/Independent	Blowing Rock/Tanglewood /Pinehurst



# Welcome to the 2023 CVBBA Annual Conference!

Our committee and Board of Directors have been working hard for our members and we are looking forward to seeing everyone at our annual conference this September in a new location - Raleigh!

Our theme for the 2023 conference is Collaborate & Conquer. We learn early on that teamwork is how to win. When everyone is in sync and working toward a common goal, the benefits of bringing together a group of people, talents, and ideas can be powerful. In business, (and in life), when brilliant minds, with big ambitions, work towards a common goal, amazing things happen!

**Come join us at the 2023 conference to collaborate, conquer, and clear the path to winning!**

Rupesh Bharad, CVBBA 2023 President



## Featuring Keynote Speaker Allen Thomas!

We are extremely pleased to welcome Allen Thomas as our keynote speaker this year. Allen Thomas is the Regional Administrator of the SBA's Southeast region, serving Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee. He is a former three-term mayor, businessman, entrepreneur, and leader in public and private enterprise. As the mayor of Greenville North Carolina, Mr. Thomas led the post-recession recovery, rapid expansion, and robust economic growth, better connecting the city and region.

**Allen will give us insight into the latest news and SBA updates. A keynote you will not want to miss!**

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