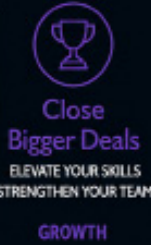




ADJUST YOUR STRATEGY.
AMPLIFY YOUR RESULTS.

CVBBA 2026 CONFERENCE



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

TUESDAY, 9/22/26

Event

Location

9:00 AM - 7:00 PM	Registration	Entrance Area
1:00 - 5:00 PM	IBBA Course #301 Intro to Mergers & Acquisitions (4 credit hours) Mike Adhikari	Cape Hatteras
2:00 - 3:30 PM	Snack Break Sponsored by Exit Factor	Prefunction
2:30 - 3:15 PM	SBA SOP - aka Shocked on Purpose Sponsor: Carter Bank, United Community	Biltmore/Hope
2:30 - 3:15 PM	AI as Your SBA Deal Desk: Is it SBA Eligible? Sponsor: Capital Bank	Bellamy/Mendenhall
3:30 - 4:15 PM	Leveraging BizBuySell's Newest Features to Attract Qualified Buyers & Streamline Deal Flow Sponsor: BizBuySell	Biltmore/Hope
3:30 - 4:15 PM	Adapting to the Evolving SBA SOP Sponsors: Bank of Oak Ridge and CIBC Bank USA	Bellamy/Mendenhall
3:30 - 4:15 PM	IWEN Meeting (Open to Everyone)	Kitty Hawk
5:00 - 6:00 PM	CVBBA Board Meeting	Kitty Hawk
6:00 PM	CVBBA Welcome Reception and Dinner - Sponsored By PLG Law	Blowing Rock/Chimney Rock

WEDNESDAY, 9/23/26

6:30 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
7:30 AM	Registration	Entrance Area
7:45 - 8:20 AM	First Time Attendee Orientation AJ Ramsey and Heather Valeri	Pinehurst
7:45 - 8:20 AM	Straight from the Board: An open Q&A CVBBA Board Members	Tanglewood
8:30 - 9:00 AM	Welcome & Opening Remarks AJ Ramsey	Blowing Rock/Chimney Rock
9:00 - 10:00 AM	Keynote - How to Achieve Your Goals with a Single Page Dr. Sarah Glova	Blowing Rock/Chimney Rock
10:10 - 10:55 AM	Fundamentals of Working Capital Mike Adhikari	Pinehurst
10:10 - 10:55 AM	10 Lessons from a Decade of Business Brokerage Mike Metzger	Tanglewood
10:55 - 11:25 AM	Break with Sponsors - Sponsored by Fidelity Bank	Blowing Rock/Chimney Rock
11:30 - 12:15 PM	Importance of Balance Sheet in a Transaction Mike Adhikari	Pinehurst
11:30 - 12:15 PM	Franchise Business - Access, Grow, Position, Sell Rick Chess, Van Daughtry and Eric Perkins	Tanglewood
12:15 PM	Lunch Sponsored by Banesco USA	Blowing Rock/Chimney Rock
12:45 - 1:45 PM	Deal or No Deal: Navigating the New SBA SOP Mark Pompeo Sponsor: Live Oak Bank	Blowing Rock/Chimney Rock
1:45 - 2:30 PM	Growing Your Brokerage: Strategies for Building a Winning Team Rupesh Bharad, Tony Khoury	Pinehurst
1:45 - 2:30 PM	The Valuation Playbook: Pricing Businesses for Success Jim Turner, Michael Goddard Sponsor: Fidelity Bank	Tanglewood
2:35 - 3:15 PM	Maximizing your CVBBA/IBBA Joint Membership Emily Bowler and Sarah Grossman	Blowing Rock/Chimney Rock
3:20 - 4:20 PM	Panel - Working with Private Equity Firms Moderator: AJ Ramsey; Tripp Andracchio - Acme Plumbing/Broadtree Partners, Ryne Collins - Plexus Capital, Chase Comier - BDI Partners, Eric Plant - CBC Family Office	Blowing Rock/Chimney Rock
4:25 - 4:55 PM	Break with Sponsors Sponsored by First National Bank	Blowing Rock/Chimney Rock
5:00 - 5:45 PM	The AI-Powered Broker: Best Tools to Amplify Your Digital Marketing Heather Valeri and Allie Weaver Sponsor: Deal Studio	Pinehurst
5:00 - 5:45 PM	The ROI on Relationships and Lead Generation Rick Chess, Andre Council, Van Daughtry, Scott Gordon	Tanglewood
6:30 PM	Evening Reception, Dinner and Drinks Sponsored by Live Oak Bank	Blowing Rock/Chimney Rock
7:45 PM	Music Bingo Sponsors: Live Oak Bank, PLG Law, Banesco USA, Huntington Bank	Blowing Rock/Chimney Rock

THURSDAY, 9/24/26

6:30 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
7:45 - 8:30 AM	Panel: Impact of AI on Business Brokerage Moderator: Mike Keen; Todd Little, Tom Morse, Sponsors: Gal Barzilay - Legacy AI, Lindsay Cost - Huntington Bank	Blowing Rock/Chimney Rock
8:30 - 9:00 AM	Keynote - SBA News and Update Aregnaz Mooradian - Deputy District Director U.S. SBA NC District Office, Jason Woods - Lender Relations Specialist SBA NC District Office	Blowing Rock/Chimney Rock
9:05 - 9:40 AM	Break with Sponsors Sponsored by Truliant SBA Lending	Blowing Rock/Chimney Rock
9:45 - 10:30 AM	Anatomy of a Perfect Deal Robert Fisher, Christine Kirilloff Sponsor: Banesco USA	Pinehurst
9:45 - 10:30 AM	The Power Package: Selling the Business and the Building Chris Thorpe, Brian York, Peter Hanna Sponsor: Hopley Hanna	Tanglewood
10:35 - 11:20 AM	Business Tax Strategies When Selling a Business Kevin Bassett, Bassett & Associates	Pinehurst
10:35 - 11:20 AM	Serving Up Success: Becoming the Hospitality & Restaurant Expert Moderator: Ben Shaw; Terry Espy, Roberta Lowe, Scott Jones Sponsor: Truliant SBA Lending	Tanglewood
11:30 - 12:30 PM	Lunch Sponsored by Huntington Bank; Top Producer Awards and Raffle	Blowing Rock/Chimney Rock
12:30 - 1:30 PM	Panel - Low Middle Market Key Players Moderator: AJ Ramsey; Kevin Bassett, Bassett & Associates, Adam Whitesell, Inspired Capital, Tad Cook, Sponsor - PLG Law, Brent Roberts Sponsor - Exit Factor	Blowing Rock/Chimney Rock
1:30 - 2:00 PM	Vision for 2027 Heather Valeri	Blowing Rock/Chimney Rock
2:00 PM	Wrap Up AJ Ramsey	Blowing Rock/Chimney Rock

Welcome to the 2026 CVBBA Annual Conference!



AJ Ramsey, 2026 President of the CVBBA

Welcome to the 2026 CVBBA Annual Conference "Change Your Mix in '26!"

This year, we're encouraging you to change your mix - explore new ideas, strengthen your skills, build new relationships, and discover strategies that can help you Build Better Deals, Win More Deals, and Close Bigger Deals.

We have an outstanding conference planned, beginning with an IBBA course that provides valuable education and credit toward your CBI designation. Throughout the conference, you'll find an exciting mix of main-stage presentations, interactive workshops, panels, and breakout sessions covering the issues and opportunities shaping business brokerage today.

We are especially pleased to feature two keynote presentations. Dr. Sarah Glova will present "How to Achieve Your Goals with a Single Page," sharing a practical approach to turning ambitious goals into focused action. We will also hear directly from representatives of the U.S. Small Business Administration with an important SBA News & Update, providing timely insight into developments affecting SBA lending and business transactions.



Keynote Speaker - Dr. Sarah Glova

After a career as a business reporter and podcast host, **Dr. Sarah Glova** turned her experience interviewing successful people into insights about the art and science of achievement. A business owner herself, her journey from entrepreneur to a sought-after speaker has taken her from California to Qatar, from the TEDx stage to events with Panasonic, Microsoft, and more, and in 2024, she was inducted into the North Carolina Women Business Owners Hall of Fame. She teaches leadership communication, technical writing, and business storytelling at Duke University's Fuqua School of Business, and she loves taking the stage to help others focus on achieving their really big goals.



Aregnaz Mooradian



Jason Woods

Keynote Speakers

Aregnaz Mooradian Since September 2021, Aregnaz Mooradian has been serving as Deputy District Director with the U.S. Small Business Administration's (SBA) North Carolina District Office in Charlotte. In this capacity, Aregnaz is a partner to the District Director, and works for small businesses through expansion of SBA's programs and services.

Jason Woods works as a Lender Relations Specialist in the SBA North Carolina District Office. In this role, he works with banks, originating new SBA loans, scenarios, guidelines, and other problem resolution. He previously worked in banking since 2003. He holds a Bachelor of Science in Business Administration from UNC Greensboro and is a native of North Carolina.

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