

The Premier Industry Gathering for Venture Capitalists & Institutional Investors

21st Annual



Venture Capital Investing Conference

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June 9-10, 2010
The Palace Hotel
San Francisco, CA

Wednesday, June 9, 2010 (Day 1) 7:00 – 8:00 AM **CONTINENTAL BREAKFAST & CONFERENCE REGISTRATION** 8:00 - 8:15 **INTERNATIONAL TRADE ADMINISTRATION BRIEFING – New Venture Capital Initiatives By The Department of Commerce**

Joel D. Secundy, Deputy Assistant Secretary for Services,
U.S. Department of Commerce, International Trade Administration

BRIEFING DETAILS:

In 2009, the International Trade Administration of the U.S. Department of Commerce had more than 12,000 export successes. Were your portfolio companies among them? If not, why? The International Trade Administration of the U.S. Department of Commerce has an innovative export pipeline initiative geared toward venture-backed companies that aims to ensure the competitiveness of U.S. venture capital firms and deepen the U.S. exporter base with the objective of unlocking a previously untapped group of new-to-export firms. 8:15 - 8:30 **NVCA BRIEFING TO THE VENTURE COMMUNITY**



Mark Heesen
President
NVCA

8:30 **IBF*INTERNATIONAL BUSINESS FORUM WELCOME**

Alexandra Scott, CEO, IBF/International Business Forum
www.ibfconferences.com 8:30 - 8:45 **OPENING REMARKS FROM THE CHAIRMAN**



Dixon Doll

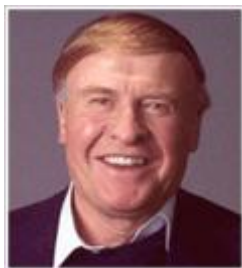
General Partner

DCM 8:45 - 9:10 2010 SPECIAL ACHIEVEMENT AWARD PRESENTATION

This honor is extended by IBF to investors who, during their lifetime and career, have made notable contributions of outstanding significance to the VC industry. Others include the following

distinguished venture capitalists: David Morgenthaler, Irwin Federman, John Mumford, Reid Dennis, and William Draper III.

2010 Honoree:



Dick Kramlich

General Partner & Co-Founder

New Enterprise Associates

Mr. Kramlich began his venture career in 1969 as a General Partner with Arthur Rock and Co. after nine years in general management as Manager of Financial Planning at the Kroger Co. and Investment Management as Executive Vice President at Gardner & Preston Moss Company in Boston. Since co-founding NEA in 1978, he has been involved in eight companies that have grown from start-up or near start-up stage to companies with market value in excess of \$1 billion, including Juniper Networks, Ascend Communications (acquired by Lucent), ImmuneX (acquired by Amgen), Macromedia (acquired by Adobe), and Dallas Semiconductor (acquired by Maxim Integrated products). Dick was the first investor to invest in the Ethernet at 3Com with Bob Metcalfe and an early investor with Dr. John Simpson in balloon angioplasty at Advanced Cardiovascular Systems (acquired by Eli Lilly) as well as Forethought (acquired by Microsoft), the company that originated PowerPoint. Dick continues to work with start-ups such as Financial Engines, Force10 Networks, MaxiScale, Tabula, Visual Edge, Xoom, and Zhone. He recently joined the board of CITIC Pharmaceuticals in China and is also a director of Silicon Valley Bank. Dick has received four Lifetime Achievement Awards including awards from the National Venture Capital Association (he served as Chairman and President from 1992-93), the University of California- Haas School of Business, the Silicon Valley Deloitte Technology Fast 50 Program, and the Red Herring Magazine Award. He received an MBA from Harvard University and a BS in History from Northwestern University. Dick and his wife, Pamela, received a Lifetime Achievement Award from the San Francisco Art Institute in 2006. They are noted collectors of Media Art and founded the New Art Trust to foster best practices in the field in 1997.

9:10 - 10:00 ***THE TIMES ...THEY ARE A CHANGING!***
THE RESURRECTION OF VENTURE CAPITAL

- Are we beginning a period of resurgence for VC investing
- What are the most significant economic, market and competitive dynamics shaping your current investment strategies
- Forecasts for the IPO market: is the window opening
- Words from the wise: what changes will the new guard need to to make going forward

Panelists:

Gary Morgenthaler, General Partner, Morgenthaler Ventures

Sandy Miller, General Partner, Institutional Venture Partners

Dick Kramlich, Co-Founder & General Partner, New Enterprise Associates

Navin Chaddha, Managing Director, Mayfield Fund

Shawn T. Carolan, Managing Director, Menlo Ventures

Matt Howard, General Partner, Norwest Venture Partners

Moderator:

Craig Dauchy, Partner, Cooley LLP

10:00 - 10:30 **MORNING NETWORKING & REFRESHMENT BREAK** 10:30 - 11:15

WALKING A TIGHTROPE:

BALANCING THE NEW GP/LP PARADIGM

The most profound impact of the recent global financial crisis the venture industry has had to face is the reduction of capital to the VC asset class. With LPs forced to reevaluate their asset allocation approach, the VC industry must adhere to the new rules and regulations presented by the institutional investor partner. This panel will examine different GP/LP investment structures, asset allocation, and global investment strategies.

Panelists:

Chris Douvos, Co-Head, Private Equity, The Investment Fund of Foundations

David York, CEO, Paul Capital Investments

Stefan Hepp, CEO and Founder, SCM Strategic Capital Management AG

Gregory V. Stento, Managing Director, HarbourVest

Moderator:

Seth H. Blackman, Principal, CPA, Rothstein Kass 11:15 - 12:00 **LP REACTIONS TO NEXT-GEN FUND MANAGERS**

Strategies being used by today's institutional investors to ensure access to the next generation of star VC performers

How are LPs reacting to the newly consolidated, transformed venture industry

Next-gen fund manager performance characteristics expected by LPs

Panelists:

Georganne Perkins, Managing Director, Fisher Lynch

Malcolm Goepfert, Director of Investments, The James Irvine Foundation

Anita Ng, Senior Consultant, Cambridge Associates

Judith Elsea, Co-Founder & Managing Director, Weathergage Capital

Jim Tullis, Founder, Tullis Health Investors/Tullis Dickerson

Moderator:

Mark P. Tanoury, Partner, Cooley LLP 12:00 - 12:45 **STAYING COMMITTED: LIMITED PARTNERS SPEAK OUT ON WHY VC IS STILL AN ATTRACTIVE ASSET CLASS**

Bret Jepsen, San Francisco Employees' Retirement System

Rick Bolander, General Partner, Gabriel Venture Partners

Sven Weber, Managing Director, SVB Capital

Moderator:

Paul Denning, Founder, Denning & Co. 12:45 - 1:45 **LUNCHEON RECEPTION**

1:00 - 1:45 **LUNCHEON KEYNOTE PRESENTATION**



Deborah Hopkins

Chairman of Venture Capital Initiatives

Chief Innovation Officer

Citigroup 1:45 -2:30 **CORPORATES AND VCS: INNOVATION PARTNERING IN ACTION**

The impact of corporate/VC collaboration in helping entrepreneurs accelerate commercialization.

These leading corporate innovation executives, joined by their VC partners, will discuss how they're working successfully with entrepreneurs, perspectives on the urgency, requirements and potential pay-off of partner relationships and future trends in corporate/VC collaboration.

Panelists:

Matt Murphy, General Partner, Kleiner Perkins Caufield Byers

Cyriac Roeding, CEO of shopkick

Dion Lisle, EVP, Growth Ventures, Citigroup

Sonny Jandial, Brand Manager, P&G FutureWorks

Moderator:

Larry Downes, Partner, The Bell Mason Group

2:30 - 3:00 **AFTERNOON NETWORKING & REFRESHMENT BREAK** 3:00 - 3:45

Concurrent Sessions:

Session A:

HARNESSING HEAVYWEIGHT TEAMS:

BOARD MEMBER MANAGEMENT TO ENACT GROWTH STRATEGIES—

The C-level leadership approach: selecting talent to motivate, guide and encourage strategic action

Building competitive advantage: management styles to expedite explosive growth

Senses of urgency: timing and impact of board member management attention and influence

Panelists:

Jason Green, Founder & General Partner, Emergence Capital Partners

Kate Mitchell, Managing Director, Scale Venture Partners|

Wade Woodson, General Partner, Sigma Partners

Sunil Dhaliwal, General Partner, Battery Ventures

Moderator:

Jeff Kuhn, Managing Partner, FLG Partners

Session B:

VALUATIONS:

CONSISTENCY EXPECTATIONS ACROSS SECTORS & STAGES

Panelists:

Raman Khanna, Managing Director, ONSET Ventures

David Quinlivan, Managing Director, Saints VC

Wade Hansen, Managing Director, Cabrillo Advisors

Hany Nada, General Partner, GGV Capital

Moderator:

Owen Dahl, Partner, Moss Adams LLP

3:45 - 4:30

Concurrent Sessions:

Session A:

EARLY STAGE EVOLUTION:

INNOVATIVE APPROACHES TO FUNDING TOMORROW'S ENTREPRENEURS

Panelists:

Ammar H. Hanafi, General Partner, Alloy Ventures

Rob Coneybeer, General Partner, Shasta Ventures

Venu Shamapant, General Partner, LiveOak Venture Partners

Jon Callahan, General Partner, True Ventures

Guido Hillebrands, CEO of Innoveas AG

Moderator:

Thomas Caldwell, Managing Partner, Marin Financial Consulting Group

Session B:

SECONDARY MARKET INVESTING: WHO ARE THE NEW BUYERS?

Panelists:

Maximilian M. Schroeck, Managing Partner, Cipio Partners

Hans Swildens, Founder & Principal, Industry Ventures

Andrew Caspersen, Principal, Collier Capital

Nathan Werner, Vice President, Fund Evaluation Group

Paul T. Kangail, Principal, CPA, Rothstein Kass

Moderator:

Scott Myers, Managing Director, Cogent Partners

4:30 - 5:15 **Concurrent Sessions**

Panel Discussion: Session A:

GLOBAL FUNDRAISING AT THE FOREFRONT

Panelists:

Mike Kelly, Managing Director, Hamilton Lane

George Arnold, Managing Principal, Knightsbridge Advisors

Robert M. Hofeditz, Partner, Probitas Partners

Neetesh Kumar, Partner, Rho Fund Investor

Kim Kaplan Gross, Partner, Cooley LLP

Moderator:

Vincent J. Calcagno, Principal, CPA, Rothstein Kass

Presentation: Session B

BENCHMARK ANALYSIS:

CAN THE U.S. VC-INDUSTRY STILL COMPETE GLOBALLY?

Adj. Prof. Dr. Martin Haemmig

Senior Advisor on Venture Capital

Stanford University

5:15 - 7:00 **COCKTAIL RECEPTION**

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