



MENDOZA COLLEGE OF BUSINESS

Nonprofit Executive Programs

Financing Your Business: Access to Capital and Credit

May 12-13, 2015
OMNI Atlanta Hotel
100 CNN Center
Atlanta, GA



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Mendoza College of Business

Nonprofit Executive Programs

Financing Your Business: Access to Capital and Credit

Tuesday, May 12, 2015 All sessions will be held in the Omni Atlanta Hotel,
International Ballroom A

8:00 – 9:00 AM | Continental breakfast in International Ballroom A

12:00 – 1:00 PM | Lunch in International Ballroom B

9:00 AM – 4:00 PM | Financing Your Business

Presenter: Gale Bowman, IrishAngels

What is the proper institute to approach for financing? The SBA? Local Banks? Credit Unions? Venture Capitalist? What about the new online “crowd funding” phenomenon that is currently catching fire? These sessions would include those questions and more.



Gale Bowman is the managing director of IrishAngels, an early stage angel investment group. Since joining the IrishAngels founding team in summer 2012, Bowman has helped increase group membership to 75 investors, and has overseen three investments totaling more than \$1 million in seed and Series A capital. As an adjunct instructor at the Mendoza College of Business, she teaches a course in early stage investing. Her previous work experience includes market research consulting at Nielsen and corporate strategy at Orbitz.

Bowman has consulted multiple startups in areas such as customer research, marketing and funding strategy. She is an Entrepreneur-in-Residence at the Gigot Center for Entrepreneurship and a member of the Irish Entrepreneurs Network. Bowman earned a BBA with honors from the University of Notre Dame and an MBA with honors from the University of Chicago Booth School of Business.

6:00 – 7:30 PM | CTI Reception – Omni Atlanta Hotel, Pecan Foyer

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Financing Your Business: Access to Capital and Credit

Wednesday, May 13, 2015

8:00 - 9:00 AM | Continental breakfast

12:00 - 1:00 PM | Lunch in International Ballroom B

9:00 AM - 12:00 PM | Financing Your Business

Presenter: Robert R. Woods, Summit Capital Group



Robert Woods is Managing Principal of Summit Capital Group, a private fund with investments in various asset classes, with a primary focus in real estate. Since 2005, he has also served as President & CEO of Republic Development, L.C., a full-service real estate development firm that has entitled or delivered over 1,500 residential units to the market under his leadership.

Development projects include residential subdivisions, condominiums, apartments, office buildings, and a master-planned golf course community. Additionally, Mr. Woods has placed financing for over \$100 million of real estate projects into the secondary market through his role as SVP at Republic Mortgage Commercial, L.C.

Mr. Woods previously worked as President & CEO of Jordan Energy, a nationwide renewable energy development company headquartered in New York. In addition, he served Director of Global Strategic Planning for Trammell Crow Company, where he was responsible for the strategic planning of American Express Company's 18 million square foot global real estate portfolio. In this role, he received awards from American Express Company for his leadership and performance on the following projects: Post-9/11 Headquarters Strategy; North American Sale-Leaseback Project; and Pan-LAC (Latin American & Caribbean) Strategy. Further, he spearheaded the development of the first-ever global real estate long range plan, created a Pan-European Real Estate Strategy, and master-planned corporate campuses across the globe. Prior to his employment with Trammell Crow Company, he was a Real Estate Consultant with Deloitte.

Mr. Woods is a member of the University of Notre Dame Mendoza College of Business Graduate Alumni Board, where he serves as Chair of the Alumni Engagement Committee. He is also Past Chairman of the Zions Bank Top of the Mountains Bowl, an annual NJCAA football bowl game that has hosted the junior college football national championship three times since its inception in 2004. He sits on the board of directors of C. Kay Cummings Candies, Republic Mortgage Commercial, and Hill Country Furnishings. In addition, he sits on the board of advisors of SIRQ Construction, a multi-state commercial construction company. He also sits on the investment committee of Element Capital, a Utah-based private equity firm. Mr. Woods is active in civic affairs, where he currently serves as Unit Commissioner of Troop 297 of the Boy Scouts of America Great Salt Lake Council; serves as a member of the National Kidney Foundation Living Donor Council; and is active as a lay leader in his church.

Mr. Woods holds a B.S. from Brigham Young University and an M.B.A. from the University of Notre Dame.

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Financing Your Business: Access to Capital and Credit

1:00 – 4:00 PM | Wells Fargo Session: “Help to Manage a Business Owner’s Valuable Asset... Credit”

1:00 – 1:30 PM | WF Works

Presenter: Darrell Green, Wells Fargo, Small Business Strategy Consultant - Southeast Region

Learn about an exciting resource for your Chamber members to help them start, run, and grow their business on the Wells Fargo Works for Small BusinessSM website. Chamber members will find complimentary resources, videos, and articles from industry specialists and successful business owners sharing strategies, best practices, and tips.

This session will focus on the business credit and financing needs of your Chamber members. Eli will cover how credit and lending work, explore the possibilities of credit financing, and show you how to make the most of your member’s credit opportunities – both traditional and nontraditional.



Darrell Green has more than 20 years experience in commercial and business banking relationship management, sales administration, strategy and consulting. He specializes in lending, optimizing cash flow and providing customized business solutions for his clientele, which includes businesses that generate \$2-50 million in revenue. Green has a graduate degree in business administration with a concentration in banking and finance from Morehouse College. Additionally, he is a graduate of Wells Fargo /UCLA Black/African American Leaders Program.

1:30 – 2:30 PM | Managing Credit for Business Success

Presenter: Eli Marks, Wells Fargo, Retail Credit Manager, Southeast Region

This session will focus on the credit and financing needs of businesses of your Chamber members. Eli will cover how credit and lending work, explore the possibilities of credit financing, and show you how to make the most of your member’s credit opportunities — both traditional and nontraditional.



Eli Marks leads Wells Fargo’s southeast region’s efforts in acquiring new and profitable consumer and small business credit volume. He also partners with the three regional presidents within the region to set loan strategies and with the community bank presidents reporting to them on retail credit and small business sales initiatives and ongoing performance of the consumer credit portfolio. Marks monitors competitors’ activities and coordinates with the pricing team. His team of retail credit sales consultants across the geography are responsible for sales coaching with personal bankers relating to retail and small business loans for the region. Marks also manages the region’s existing consumer credit portfolio.

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Financing Your Business: Access to Capital and Credit

2:30 - 2:40 PM | Break

2:45 - 4:00 PM | **Managing Credit for Business Success**

Moderator: Georgette “Gigi” Dixon, Wells Fargo, SVP/Director of Strategic Partnerships

Presenter: USBC Rep, USHCC Rep, USPAACC Rep and NGLCC Rep

Learn from your colleagues on this best practice panel where they share how they helped guide their small business member from a non-traditional loan to a traditional loan. Also, hear how one Chamber was granted \$375,000 from the U.S. Department of Agriculture Rural Development Department to serve as a designated microlender in its county.



Georgette Dixon, is senior vice president and director of strategic partnerships for Wells Fargo, where she is responsible for managing a portfolio of national nonprofits that deliver advocacy, programs and services for low- to moderate-income communities and diverse groups. Through collaboration with internal partners, Dixon and her team develop strategy, provide consulting and structure-funding recommendations to build community brand and corporate reputation while facilitating cross-enterprise engagement with national nonprofits. Since joining Wachovia in 1994, Dixon served as marketing manager for wholesale banking, small business banking, commercial banking and as director of emerging (multicultural) markets. In 2005, Dixon was recognized as one of U.S. Banker magazine’s Most Powerful Women to Watch.

4:00 | **Chamber Breakout Sessions: Held in International Ballroom A, B, C, and Pecan Foyer**

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