



North Carolina Investment Forum

February 21, 2019 • Kenan Center, UNC Kenan-Flagler Business School

- 11:30 a.m. **Register/Gather**
- 12:00-1:15 p.m. **Luncheon** (Kenan Center Dining Room)
Keynote Address:
 Linda McMahon, *Administrator of the Small Business Administration*
CREATE Announcement
- 1:15-1:30 p.m. **Break** (transition to Room 204)
- 1:30-3:15 p.m. **Afternoon Workshop 1 - Transitioning from Angel to Institutional Investors**
Moderator: Prof. Ted Zoller, *Kenan-Flagler Business School*
 Chelsea Eshraghi, *Director, Carolina Angel Network*
 Alston Gardner, *Venture Partner, Fulcrum Equity Partners*
 Mark Roberts, *CIO, Ironsides Asset Advisors*
 Kirill Sheynkman, *Co-founder & GP, RTP Ventures*
- Afternoon Workshop 2 - Search Funds and NC Small Business Growth**
Moderator: Prof. Shawn Munday, *Kenan-Flagler Business School*
 Brandon Garcilazo, *Operating Partner, Tobacco Road*
 Badge Stone, *Managing Director and Co-founder, WSC & Company*
 Katie Walker, *Vice President, Plexus Capital*
- 3:15-3:30 p.m. **Break**
- 3:30-5:00 p.m. **Afternoon Workshop 3 – Opportunity Zones**
Moderator: Napoleon Wallace, *Kenan Institute of Private Enterprise*
 Jeanne Milliken Bonds, *Community Development, Federal Reserve Bank of Richmond*
 Don Dwight, *Executive Tax Director, EY*
 Tyler Mulligan, *Director, Development Finance Initiative, UNC School of Government*
 Thomas Stith, *Co-Founder and CEO, The Michael Thomas Group*
- Closing Remarks:
 Dale R. Folwell, *State Treasurer of North Carolina*

Reception to Follow (Kenan Lounge)

Register [here](#) or contact Rebecca Mormino (rebecca_mormino@kenan-flagler.unc.edu / 919-843-6287).