



5th Annual Fintech Executive Roundtable

October 22, 2009

3:00 – 7:30 PM

The Penn Club of New York
30 West 44th Street
New York, NY 10036
-Tarnopol Room-

AGENDA

- 3:00pm – 3:15pm Registration and Networking
- 3:15pm – 3:30pm Welcome - Edison Venture Fund Fintech Overview
Chris Sugden, Managing Partner
- 3:30pm - 5:45pm Roundtable Discussion
- **Channel Strategies**—How to make partners/channels pay off with qualified lead flow and actual customers
Mitchell Rose, Vice President, Marketing, Billtrust
 - **Managing Clients in the Cloud**—Effective strategies to manage reliability, uptime, SAS70 audits/requests, etc.
Bob Miller, CEO, CorrectNet
 - **Value Creation and the Exit Environment**—What buyers value, current valuation environment, recent transactions
Michael H. Jones, Managing Director, Raymond James Investment Banking
James E. Bunn, Managing Director, Raymond James Investment Banking
 - **Strategic Marketing/Positioning** – Differentiating your message from the noise, getting the **buyers'** attention
Richard Currier, Owner, Park City Marketing
- 5:45pm -7:30pm Cocktails & Hors d' oeuvres Reception

For more information or to register please contact
Judi Bailey, judi@edisonventure.com or 609-873-9235