CEO SUMMIT 2019

edisonpartners

MAY 15 TO MAY 17, 2019 | WASHINGTON D.C.

WELCOME

WELCOME TO EDISON PARTNERS' EIGHTH ANNUAL CEO SUMMIT!

We are happy and hype that you are here. We would like to ask you for three things while we are together for two and a half days.

1) Be open minded and proactive to talk with your fellow CEOs about your challenges and your opportunities both short-term and in 2020.

2) Keep a list of items you are keen to learn more after the Summit.

3) Make a commitment that you will take one thing with you from this Summit and implement it for the second half of 2019 and into 2020. Equally important, share what you have learned here with at least ten people in the company you lead.

This Summit is an exclusive event always centered on CEO leadership. The goal is to take time out to reflect on you. How you are doing, where you are going, who you are taking and what you will build and scale. We assemble these programs because we love it and we know continuous learning is best achieved from experts and through peers. We will connect strategy and style to your influence, your pricing and your ability to win. We have designed short educational spotlights with our sponsors on critical success factors of your business. In addition, over the next two days, we will offer you personal stories of natural-born entrepreneur who have scaled the summit and want to share their lessons and insights.

Finally, I would like to ask you one more thing to consider and discuss at breakfasts, dinners, and during a convivial ale:

Are you personally committed to nurturing and instilling leadership skills with a method and intensity for your team and select employees in your company?

With Pride and Purpose,

Lacey LaManna & Christopher Clark

DAY 1: WEDNESDAY, MAY 15

11:00-12:00 PM	Arrival & Registration
12:00-1:00 PM	Lunch Available
1:00-1:20 PM	**Welcome & Introduction** *Chris Sugden & Christopher Clark*
1:20-1:45 PM	**Profile of Tier 1 Company** *Ryan Ziegler & Tom Vander Schaaff*
1:45-2:45 PM	**Implementing a KPI Organization** *Jim Szafranski, Prezi*
2:45-3:00 PM	**An Exceptional Executive & Compensation Bands** *Sean Walker, Bowdoin Group*
3:00-3:20 PM	Break
3:20-3:35 PM	**Supporting a KPI Organization** *John Lanza, RSM US LLP*
3:35-5:00 PM	**Lessons Learned from Cvent CEO** *Reggie Aggarwal, Cvent*
5:00-5:50 PM	Break
5:50 PM *PROMPT*	Shuttle Service Provided in *The Hay-Adams* Lobby
6:30–9:30 PM	Welcome Reception & Dinner at *The John F. Kennedy Center for the Performing Arts* *Reception Attire: Business Casual*

AGENDA

DAY 2: THURSDAY, MAY 16

7:00-8:00 AM	Breakfast at *Top of the Hay*
8:00-8:15 AM	Recap Day 1 *Daniel Herscovici & David Nevas*
8:15 – 9:45 AM	**The Negotiation Game** *Robert Bontempo,* *Columbia Business School*
9:45-10:05 AM	Break
10:05–11:50 AM	**Psychology of Persuasion & Social Styles** *Robert Bontempo,* *Columbia Business School*
11:50–12:00 PM	**Capital Formation & Exit Planning** *Andrew Gilbert, DLA Piper*
12:00-1:00 PM	Lunch
1:00-1:30 PM	**Negotiation Wrap-up** *Robert Bontempo,* *Columbia Business School*
1:30-2:50 PM	**Keynote Speech by *Molly Fletcher***
2:50-3:10 PM	Break
3:10–4:45 PM	**Pricing for Growth** *Z. John Zhang, The Wharton School*
4:45–5:00 PM	**Negotiate A Deal & Wrap-Up** *Brad Ellis, Stifel Bank*
5:00–6:15 PM	Break
6:15 PM *PROMPT*	Shuttle Service Provided in *The Hay-Adams* Lobby
7:00 PM	Networking Reception & Dinner at the *International Spy Museum* *Reception Attire: Business Casual*

DAY 3: FRIDAY, MAY 17

7:30–8:30 AM	Breakfast Available at *Top of the Hay*
8:30–8:45 AM	Recap from Day 2 *Daniel Herscovici & David Nevas*
8:45–9:00 AM	**Why Venture Debt?** *Kevin Urban, Comerica*
9:00–10:00 AM	**Growth, Cash & Valuation** *Michael R. Roberts,* *The Wharton School*
10:00–10:15 AM	Break
10:15–11:10 AM	**Part 2: Growth, Cash & Valuation** *Michael R. Roberts,* *The Wharton School*
11:10–11:30 AM	Wrap-up & Closing *Chris Sugden & Ryan Ziegler*
11:30 AM	Optional Lunch

JIM SZAFRANSKI

COO & BOARD MEMBER, PREZI

Jim is currently the Chief Operating Officer and a member of the Board at Prezi, Inc.

At Prezi, Jim leads company strategy, business development, and data analytics plus marketing, sales and customer operations. Jim also led finance at Prezi prior to recruiting a CFO. Jim is active in leading board meetings and ongoing communications with Prezi's investors at Accel, Spectrum Equity, and Sunstone. Jim has helped build Prezi into a 100M+ strong user community that has created the world's largest publicly available database of educational and professional presentations.

Since earning his engineering and business degrees from MIT and Stanford, Jim has built his career around helping users and communities adopt new technologies across internet, mobile, security, and collaboration markets. Jim is passionate about creating innovative user experiences and companion business models and frequently speaks at technology conferences on this topic.

Prior to Prezi, Jim was SVP of product management, customer acquisition and success at Fiberlink (acquired by IBM) where he helped build the company's industry-leading mobile enterprise cloud platform. Earlier in his career, as a product director, Jim helped build Tut Systems growth trajectory that led to a ground breaking IPO in January 1999 as one of the early dot-com offerings that opened up the market for many more to follow. While at MIT earning a graduate engineering degree, Jim implemented pioneering AI technology in industry while part of MIT's computer science and AI lab.

REGGIE AGGARWAL

CEO AND FOUNDER, CVENT

Reggie Aggarwal is the CEO and Founder of Cvent, the market-leading meetings, events, and hospitality technology provider. Reggie founded Cvent in 1999 as a two-person startup, and today the company has more than 4,000+ employees and 300,000 users worldwide.

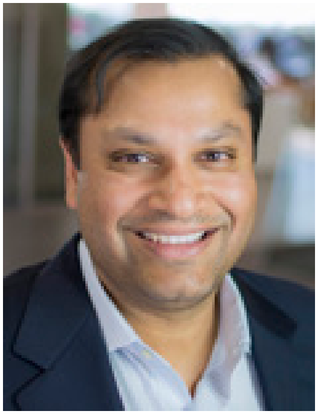
"Ideas are like buses. You've just got to get yourself on the bus and close the door as quickly as you can. Especially, because you have guys like Reggie. They're going to quit their job, work 100 hours a week, and put everything they own into the business."

- Alejandro Cremades, Forbes

Cvent's software solutions optimize the entire event management value chain and have been used to power millions of meetings and events across 25,000 organizations. Cvent was a publicly traded company (NYSE: CVT) until it went private with Vista Equity Partners in November 2016 for $1.65 billion.

Reggie was named the #1 SaaS CEO by The SaaS Report in their 2018 Top 50 list, CEO of the Year and the most admired CEO by the Washington Business Journal, Entrepreneur of the Year for the Washington, DC area by Ernst & Young, and a rising star by Forbes Magazine. He has been featured in publications such as Forbes, The Wall Street Journal, The New York Times, Business Week and USA Today and has appeared on CNBC, ABC News and CBS News. Cvent is also consistently named a Best Place to Work by the Washington Business Journal, Washingtonian, and the Washington Post.

Reggie graduated with a BS degree from the University of Virginia, a Juris Doctorate from Washington and Lee University Law School, and an LLM (post-law degree) from Georgetown University Law School. He also received an Honorary Doctorate from Southeastern University for his contribution to the community.



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DLA Piper is proud to support the 2019 Edison CEO Summit Forum. As a global law firm, we deliver sophisticated, practical and creative counsel to emerging companies around the world. We have ranked consistently among the top 5 law firms in global venture capital deal volume (*Pitchbook*, 2014 – 2018) and #1 in global M&A deal volume for nine consecutive years (*Mergermarket*, 2010 – 2018).

DLA PIPER

Andrew P. Gilbert, Michael E. Helmer, Scott Cowan, Kevin M. Grant and Emilio Ragosa,
51 John F. Kennedy Parkway, Suite 120, Short Hills, NJ 07078

DR. ROBERT N. BONTEMPO

PROFESSOR OF BUSINESS, COLUMBIA BUSINESS SCHOOL

Dr. Robert Bontempo has 29 years of experience advising senior executives at the Federal Reserve Bank of New York, United Nations, United States Department of State, and leading investment banks on issues of leadership and organizational development.

In 2013, Dr. Bontempo was appointed Chairman of the Board of the Michael Baker Corporation, which provides engineering services worldwide. The firm's primary business areas are architecture, aviation, defense, environmental, and homeland security.

"Bob is a great communicator, teacher and provides real life examples of how to negotiate and win while learning about yourself. You learn the ins and out and how to apply it in the real world of business."

The winner of the 1994 Singhvi Prize for Scholarship in the Classroom, Dr. Bontempo has taught courses in leadership in the MBA, EMBA and Executive programs at the Columbia Business School since 1989 and is currently Faculty Director of Columbia Business School's executive program in Negotiation and Decision Making. He holds a BS from the University of Notre Dame, a BA from Indiana University, and a PhD from the University of Illinois.

Dr. Bontempo studies international comparative management, including international negotiations and cultural differences in decision making. His current research involves cultural factors in international negotiations and international differences in risk perception. He is a consulting editor for the Journal of Cross-Cultural Psychology and an early stage investor and advisor to several technology startups, including AppNexus, Recyclebank, and Silverline.

MOLLY FLETCHER

CEO, KEYNOTE SPEAKER & AUTHOR

Molly Fletcher is a trailblazer in every sense of the word-- a rare talent of business wisdom, relationship brilliance and unwavering optimism. A popular keynote speaker, she shares the unconventional techniques that helped her thrive as one of the first female sports agents in the high stakes, big ego world of professional sports and now a successful entrepreneur.

Formerly, as president of client representation for sports and entertainment agency CSE, Molly spent two decades as one of the world's only female sports agents. She was hailed as the "female Jerry Maguire" by CNN as she recruited and represented hundreds of sport's biggest names, including Hall of Fame pitcher John Smoltz, PGA TOUR golfer Matt Kuchar, broadcaster Erin Andrews, and basketball championship coaches Tom Izzo and Doc Rivers.

As she successfully negotiated over $500 million in contracts and built lasting relationships, she also observed and adopted the traits of those at the top of their game. Molly shares her proven approach to negotiating in her company's Game Changer Negotiation Training workshops, teaching people how to close more deals faster, while strengthening the relationship.

Molly has been featured in ESPN, Fast Company, Forbes and Sports Illustrated. A sought after motivational speaker, she delivers game changing messages to top companies, trade associations, and teams worldwide.

Molly is the author of four books: *Fearless At Work; A Winner's Guide to Negotiating; The Business of Being the Best;* and *The 5 Best Tools to Find Your Dream Career.*

"Inside of each day, we have 1,440 minutes. Fearless people maximize those little moments by leaning into discomfort and taking calculated risks. They know that fearlessness isn't just a mindset; it's about taking action."

- Molly Fletcher

Molly earned a bachelor's degree in communications from Michigan State University while captaining the women's tennis team. Molly's energy and passion for life shines through everything she does. She finds her greatest joy at home in Atlanta with her husband Fred and their three daughters.

Z. JOHN ZHANG

PROFESSOR OF MARKETING, THE WHARTON SCHOOL

DIRECTOR, PENN WHARTON CHINA CENTER

Professor Z. John Zhang's research focuses on targeted pricing and other pricing strategies, competitive strategies, market entry and channel and retail management. Recent work probed the complex, unintended pitfalls of targeted pricing – the process of targeting a competitor's customers with lower prices – in the fast-moving Internet age. Zhang's research suggested that while this approach isn't for every business, it can be an effective tool under the right circumstances. Zhang also provided guidelines to help companies understand when targeted pricing might play an effective role in their marketing strategy.

Professor Zhang's research has been published in top-tier academic journals including Marketing Science, Management Science and the Journal of Marketing Research. He also serves as Area Editor for Marketing Science, Management Science and Quantitative Marketing and Economics, and has won numerous academic and teaching awards.

Professor Zhang currently teaches Marketing Management to EMTM students, and Pricing Strategies to undergraduate and MBA. He also teaches pricing strategies to executives in China in Chinese.

"John is a perennial speaker at the Google Academy with many citations and is considered a tough grader high expectations and sometimes hilarious."

Professor Zhang received a PhD and MA in economics from the University of Michigan, a PhD and MA in History and Sociology of Science and Technology from the University of Pennsylvania, and a BA in Engineering Automation from Huazhong University of Science and Technology in Hubei, China.

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Euromoney, 2018, 2017

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MICHAEL R. ROBERTS

WILLIAM H. LAWRENCE
PROFESSOR OF FINANCE,
THE WHARTON SCHOOL

Michael R. Roberts is the William H. Lawrence Professor of Finance at the Wharton School of the University of Pennsylvania and a Research Associate of the National Bureau of Economic Research. Professor Roberts earned his B.A. in Economics from the University of California at San Diego, and his M.A. in Statistics and Ph.D. in Economics from the University of California at Berkeley.

His research spans corporate finance, banking, and asset pricing. Recent work has examined the robustness of equity pricing anomalies, and issues at the intersection of macroeconomics and finance including the role of government borrowing in affecting the supply of credit to and investment behavior of corporations. His research has received several awards including two Brattle Prizes for Distinguished Paper published in the Journal of Finance, a Jensen Prize for best paper on Corporate Finance and Organizations published in the Journal of Financial Economics, and Best Paper awards from the Financial Management Association, Southwestern Finance Association, and Rodney L. White Center for Financial Research.

Professor Roberts has served on numerous journal editorial boards, including the Journal of Finance of which he was a co editor.

In addition to his research, Professor Roberts has earned many teaching awards. At the Wharton School, his accolades include the David W. Hauk Award, multiple Excellence in Teaching awards, and multiple nominations for the Helen Kardon Moss Anvil Teaching Award. While at Duke University, he won theDaimler Chrysler Core Teaching Award at the Fuqua School of Business. While at Berkeley, he won an outstanding graduate student instructor award. He has taught undergraduate, M.B.A., Ph.D., and executive education courses in Finance, Economics, and Statistics. Outside of academia, Professor Roberts has worked as a financial engineer and consultant, providing services to many financial and nonfinancial corporations as well as expert testimony in corporate legal matters.

"Dr. Roberts is truly an expert and leader in his field. He gave me a start to my career by providing the tools, training, and instruction on how to use those tools to be a productive and engaged researcher."

A special thank you from the Partners for your leadership and for joining us at your 2019 CEO Summit!

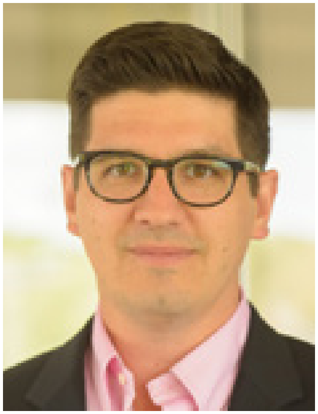
CHRIS SUGDEN, MANAGING PARTNER

Joined Edison in 2002. Leads Edison's overall strategy and co-chairs the investment committee. Led 32 financings, including 20 new investments. Currently director of five companies. Instrumental in several premium exits including Operative, PHX (now Zelis), FolioDynamix and Gain Capital (NYSE: GCAP). Previously CFO/COO of two startups, began career as an auditor with PWC. BS Michigan State, CPA. LIFE BEYOND EDISON? Chris can give you directions to nearly every hockey rink, lacrosse field and swimming pool in the Mid-Atlantic thanks to his kids, his son Cooper (16) and two daughters, Madison (14) and Ava (10). Married to Debbie, who is incredibly supportive of his work, Michigan State sports and golf addictions.

TOM VANDER SCHAAFF, GENERAL PARTNER

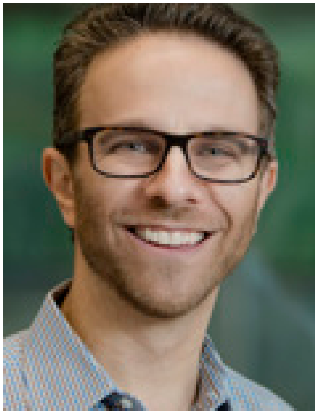
Joined Edison in 2003. Leads Edison's portfolio management and is co-chairman of the firm's investment committee. Involved in more than 50 initial investments and more than 100 total investments. Currently serves as director of four Edison portfolio companies. Twenty years of private equity experience and three years of investment banking experience. BSE, Princeton University. LIFE BEYOND EDISON? Tom enjoys spending time with his wife, Sarah, and two lovely daughters, Heidi and Ava, – and playing squash as often as he can.

RYAN ZIEGLER, GENERAL PARTNER



Joined Edison in 2003. Leads the Enterprise Software industry group and member of the firm's investment committee. Currently director of five Edison portfolio companies. He has completed new investments totaling over $300M invested capital. Before earning his enterprise tech and data stripes, Ryan helped build Fintech for Edison after coming from an industry leader, SEI (NASDAQ: SEIC). He holds a BS Business Management and BA Biology from Bucknell University. LIFE BEYOND EDISON? Enjoy living in country Jersey with my beautiful bride Nicole. Daddy sherpa and dance partner for two smart and vivacious little girls, Izzy and Nola. Born and raised in Philly, avid whisky collector, consistently beat Tom V on the squash court, and dreaming of a repeat of the Philly Special.

MICHAEL KOPELMAN, GENERAL PARTNER



Joined Edison in 2005. Leads Fintech investments and the firm's exit management practice, guiding portfolio companies through the exit process. Serves on the board of five companies. Began career at Credit Suisse where he advised numerous financing and M&A transactions. Launched E*TRADE's online investment bank which was acquired by SoundView. Past President of Wharton's private equity alumni association. MBA, Wharton School of Business, BA, University of Pennsylvania. LIFE BEYOND EDISON? Married college sweetheart, Amy. Resides in Villanova, PA where he enjoys chasing after two kids (13 and 9 years old). Michael has become increasingly active with the American Heart Association.

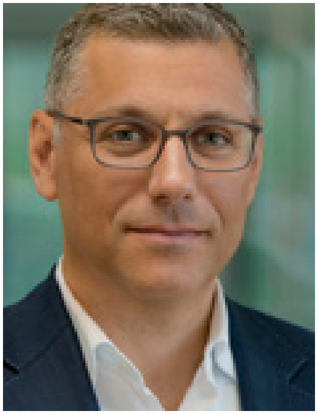
LENARD MARCUS, GENERAL PARTNER

Joined Edison in 2005 as Business Development Associate. Leads investments in Enterprise Solutions. Serves as director of four companies. Operating experience in development and finance at IBM. Delivery and managerial roles at Princeton eCom. MBA Columbia Business School; BS, Stanford. LIFE BEYOND EDISON? In his spare time, Lenard loves to read non-fiction, maintain some semblance of physical fitness, and spend time with his wife Charlotte and their three sons.

KELLY FORD BUCKLEY, PARTNER

Joined Edison in June 2014. Pioneer of the firm's operating platform, Kelly helps portfolio companies optimize and scale their go-to-market machines and leads investments in Blue Medora, ExecVision, Kinetiq and Suuchi. Prior to Edison, 20-year track record with established and emerging organizations, including SundaySky, Operative (former Edison company), LivePerson (LPSN), Groove Networks (Microsoft) and IBM. BA, Michigan State. LIFE BEYOND EDISON? Bostonian at heart, counting Fenway and Nantucket as 2nd homes; Mild sickness for home design and renovation, tolerated by husband Ryan, stepson Ryan, and two labradors, Maxwell and Harlowe.

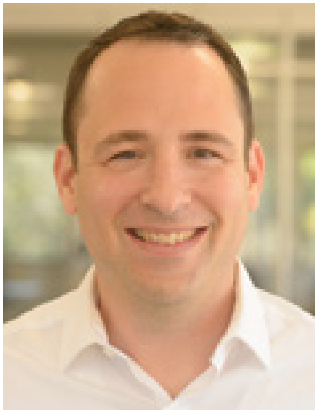
DANIEL HERSCOVICI, PARTNER



Joined Edison in 2018. Dan focuses his time within Edison's enterprise solutions practice, with a particular focus on IoT, Tech Services and companies where small business and consumers are the target market. He has held leadership roles at Comcast and Motorola. While at Comcast, he founded and led the Smart Home business, founded an IT services business, and conceived / launched Xfinity Wi-Fi. He has always been an entrepreneur and change agent within the enterprise. Dan holds an MBA from the Wharton School of Business, as well as mechanical engineering degrees from Boston University and Drexel. LIFE BEYOND EDISON? Dan and his wife Laurie collect chef and restaurant experiences like baseball cards. He is always in search of amazing food and dining experiences; his son Aaron (13) and daughter Olivia (9) don't necessarily share his enthusiasm.

GREGG MICHAELSON, PARTNER

Joined Edison in 2015 and began his tenure by advising portfolio companies on strategy, operational efficiency, and leadership. Gregg continues to advise Edison companies and focuses on investments in Healthcare IT and Enterprise software, specifically marketing technology. He serves as director for three companies. Gregg holds an MBA from NYU Stern School of Business and a BA from the University of Michigan. LIFE BEYOND EDISON? Gregg and his wife, Anne, live on a farm in Skillman, NJ with their three children, dogs, barnyard full of horses, sheep, goats, chickens, and an awesome John Deere tractor. He remains a diehard fan of his hometown Pittsburgh Steelers and Penguins.



DAVID NEVAS, PARTNER

Joined Edison in 2008. Manages investments in Marketing Technology sector and leads the Sourcing Team at Edison. He joined Edison in 2008 as an Associate, and prior had over seven years of experience in operating and consulting roles at IBM, PWC, and several startups. Before Edison, David worked at A.C. Lordi, a startup in the risk and compliance space, where he helped grow the company to an acquisition by a private equity syndicate. MBA, NYU Stern School of Business; BS, Lehigh University. LIFE BEYOND EDISON? Avid traveler with only Antarctica left on his list of continents to hit. Married to Jennifer with a three and six-year old at home… now grudgingly forced to find a new passion until they're old enough for an international flight.

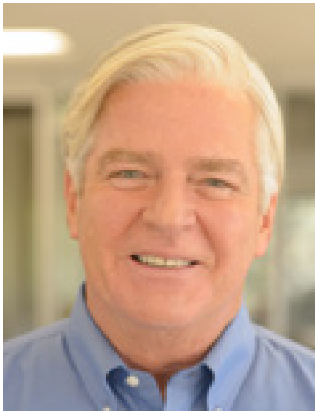
JAY NAIK, OPERATING PARTNER

Joined Edison in 2018 after a career leading high growth Enterprise software companies. Began career as an Investment Banker at Bear Stearns in their Media & Entertainment group. Post-banking, successfully exited Capital IQ to McGraw Hill Financial as an early employee and Executive team member. Then joined Dataminr as their head of both Product & Operations helping scale the company from inception to unicorn status. Jay holds an MBA from Columbia Business School and a BS from NYU Stern School of Business. LIFE BEYOND EDISON? Jay enjoys spending time with his wife Sweta and four-year-old daughter Layla while watching as many NBA games as possible.

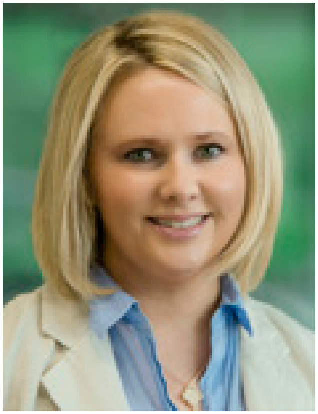
JOE ALLEGRA, GENERAL PARTNER

Joined Edison in 2001 and has led investments across Edison's targeted industry segments with primary focus on Enterpr ise Solutions. Led 30+ financings, served as a director of 25 companies and guided 16 to exit. Currently director of two Edison portfolio companies. Successful entrepreneur with 20+ years of software industry experience. Co-founder and CEO of Princeton Softech. Former Chairman of New Jersey Technology Council. MBA, NYU Stern School of Business; BA, Rutgers. LIFE BEYOND EDISON? Joe and his wife Bobbie are avid golfers, especially near their Hilton Head Island vacation home. After many years of coaching his son and daughter in soccer, basketball, baseball and softball, Joe is cheerleading as they advance their careers in film and TV producing and early childhood special education.

GARY GOLDING, GENERAL PARTNER



Joined Edison in 1997 for Edison IV. With 25+ years experience, Gary serves on the board of four companies and is part of Edison's Enterprise 2.0 investment team, focusing on Energy IT, Government IT and Telecom IT. He was Edison's director on three Edison IV companies that completed successful IPOs and exits: Liberty Tax Service (NASDAQ: TAX), Tangoe (NASDAQ: TNGO) and Vocus (NASDAQ: VOCS). Co-founder of Pittsburgh Tech Council and past President of Pittsburgh Venture Capital Association. MA, University of Pittsburgh; BS, Boston College, LIFE BEYOND EDISON? Three grown kids; coached kids (both girls & boys) basketball for seven years and hope to coach grandkids someday.



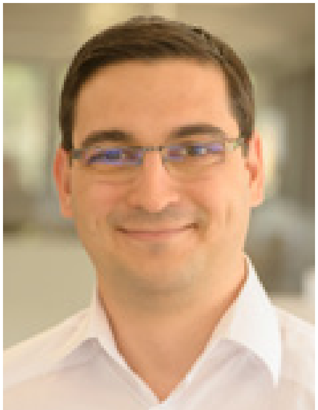
ALEX SYMOS, VICE PRESIDENT, GO-TO-MARKET CENTER OF EXCELLENCE

Joined Edison in 2018. As Vice President of Sales and Marketing Acceleration, Alex helps Edison portfolio companies accelerate and scale growth, providing operating leverage in the areas of go-to-market strategy and execution; organizational alignment and design; and architecting marketing, sales and customer success machines. Alex brings 17+ years of B2B marketing experience to Edison Partners. Prior to joining Edison, Alex spent over two years at Billtrust, a high-growth fintech provider. BA, Georgian Court University. LIFE BEYOND EDISON? Seaside native turned preserve dweller with husband Stephen, pup parent and resident swim coach to two Portuguese Water Dogs, Vasco da Gama and Koukla.

JENNIFER LEE, VICE PRESIDENT

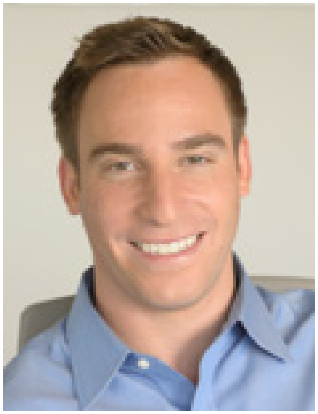
Joined Edison in 2016 and focuses on the firm's FinTech investments, co-leading investments (12 complete transactions to date) and providing strategic support. Serves as a board member on 1 company; been an observer on 6 boards. Prior to joining Edison, she was a financial analyst at Commerzbank evaluating select European equities for fundamental long/short investments for hedge fund clients. Started her career at ForgeRock, a global leader in identity and access management with a unique history stemming from Sun Microsystems, as the company's first Sales Executive; grew revenue over 100%-400%+ YoY and built the company from its first year through Series A-C. MBA, Columbia Business School; BA, Johns Hopkins University. LIFE BEYOND EDISON? Serves on the UNICEF New York chapter, volunteers with Exeter and Columbia alumni orgs. Avid traveler (with a pet-passport holding dog). Speaks four languages, wants to learn a fifth.

DOBA PARUSHEV, VICE PRESIDENT

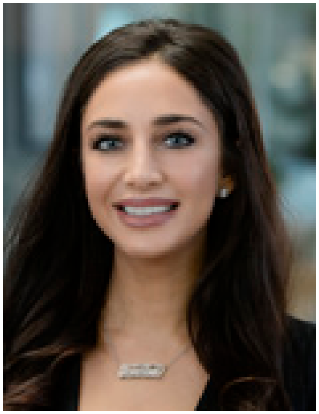


Joined Edison in 2016 and focuses on investments in the Enterprise Solutions sector, as well as on overall portfolio strategy. Doba represents Edison as an observer on three boards. Born and raised in Bulgaria, he has seen his career span five continents and range from venture capital to management consulting to non-profit work. Holds an MBA from Harvard Business School and a BSE from Princeton University. LIFE BEYOND EDISON? Learning how to be a good husband and somehow getting progressively worse at golf.

JON REYNOLDS, SENIOR ASSOCIATE

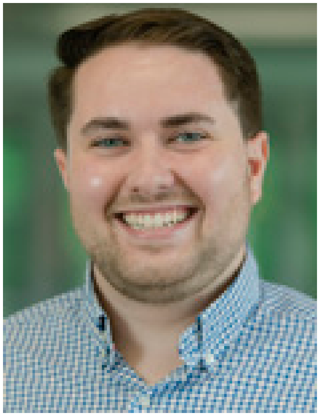


Joined Edison in 2016 and focuses on sourcing investments in the Enterprise Solutions sector. In addition to sourcing, Jon leads financial diligence and promotes best financial practices across the portfolio. Formerly working in public accounting, Jon served as Edison's auditor for three years. BS, Accounting, Lehigh University. LIFE BEYOND EDISON? If not outside playing soccer, football or golf, then it must be Sunday and Jon can be found watching the NY Jets. After growing up in the Arizona desert, he does his best to make it back out west a few times a year to visit his family.



TONI ANN CARRECCIO, ASSOCIATE

Joined Edison in January and focuses on sourcing investments in the Enterprise Solutions and Fintech sectors. Previously the Co-Founder of Axle, an enterprise solution for the trucking industry where she raised multiple rounds of angel investments and grew the company to hundreds of customers nationwide on 1, 2, and 3-year contracts. Prior to Axle, Toni was a Vice President on the equity trading desk at BNY Convergex. BS, Business Administration and Dance, University of Arizona. LIFE BEYOND EDISON? Toni loves traveling, playing golf, spending a nice summer day on the water, snowboarding (especially in Colorado), and most of all, pasta Sundays at her grandmother's house.



DEL GIANNOTTI, ANALYST

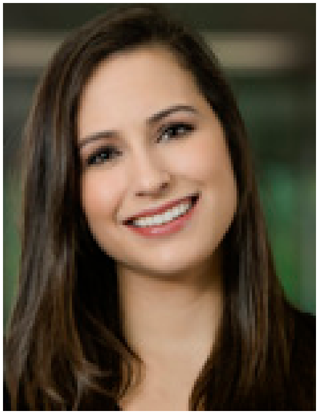
Joined Edison in 2017 and focuses on identifying and qualifying investment opportunities in the Enterprise and Healthcare sectors. Previously worked at Raymond James on a wealth management team and at Newark Venture Partners supporting startups. BA, Financial Economics and Entrepreneurship, Rutgers University. LIFE BEYOND EDISON? Finding time to play golf, rooting for the Eagles, and begrudgingly fixing friend's and family's broken iPhones.

JAY GANESAN, ANALYST

Joined Edison in 2018. Jay focuses on identifying and qualifying investment opportunities in the Enterprise sector. Previously worked in equity research for Keybanc Capital Markets and in technology investment banking for Canaccord Genuity, while also receiving early-stage experience building Munee, a mobile payments and investment start-up. BBA, Business Management & Entrepreneurship, James Madison University. LIFE BEYOND EDISON? Playing guitar and producing music, volunteering at the D.C. Central Kitchen, and staying on top of emerging fashion trends

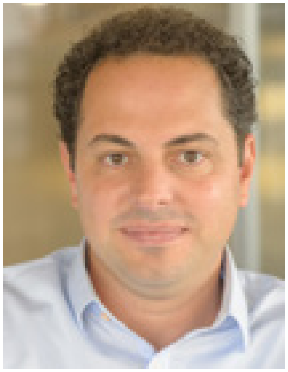
LACEY LAMANNA, MARKETING MANAGER

Joined Edison in 2018 and is responsible for programs driving brand awareness, interest, and engagement with Edison's target audiences. Lacey brings nearly seven years of marketing and event management experience to Edison Partners. BA, Communications and Public Relations, Susquehanna University. LIFE BEYOND EDISON? A family-oriented person to the core and an obsessed aunt, Lacey spends as much time as possible with her eight nieces and nephews.



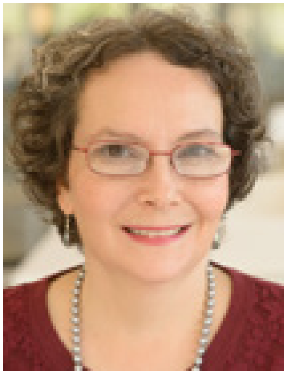
CHRISTOPHER CLARK, OPERATING PARTNER

Joined Edison in 2017. Prior to Edison, he worked in both commercial and federal entities as an executive and CEO/President. The last two companies he led on both the east and west coast resulted in very successful outcomes (Fiberlink, an Edison company, acquired by IBM & Virtela Communications acquired by NTT Communications). He lived and worked in China, Japan, Taiwan, India, Brazil, Brussels and the UK. He speaks Chinese, Japanese, Dutch and German, and holds an MBA from NYU and BBA from Temple University.



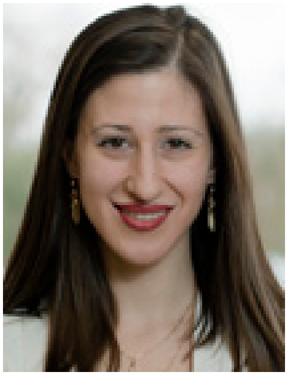
JOSEPH GIQUINTO
VICE PRESIDENT, FINANCE

EILEEN COVEY
DIRECTOR,
FINANCE & OPERATIONS

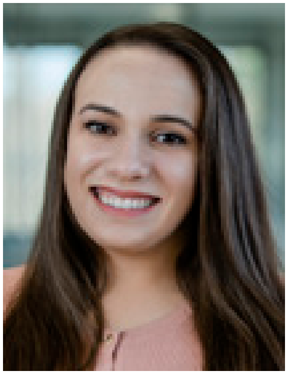


JOY WHITNEY
RESEARCH DIRECTOR

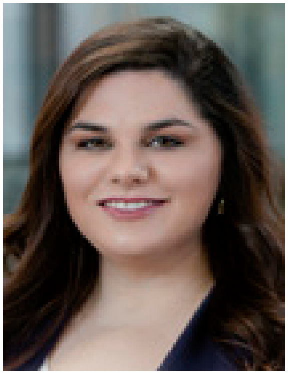
JUDI CONTURSI
LP RELATIONS



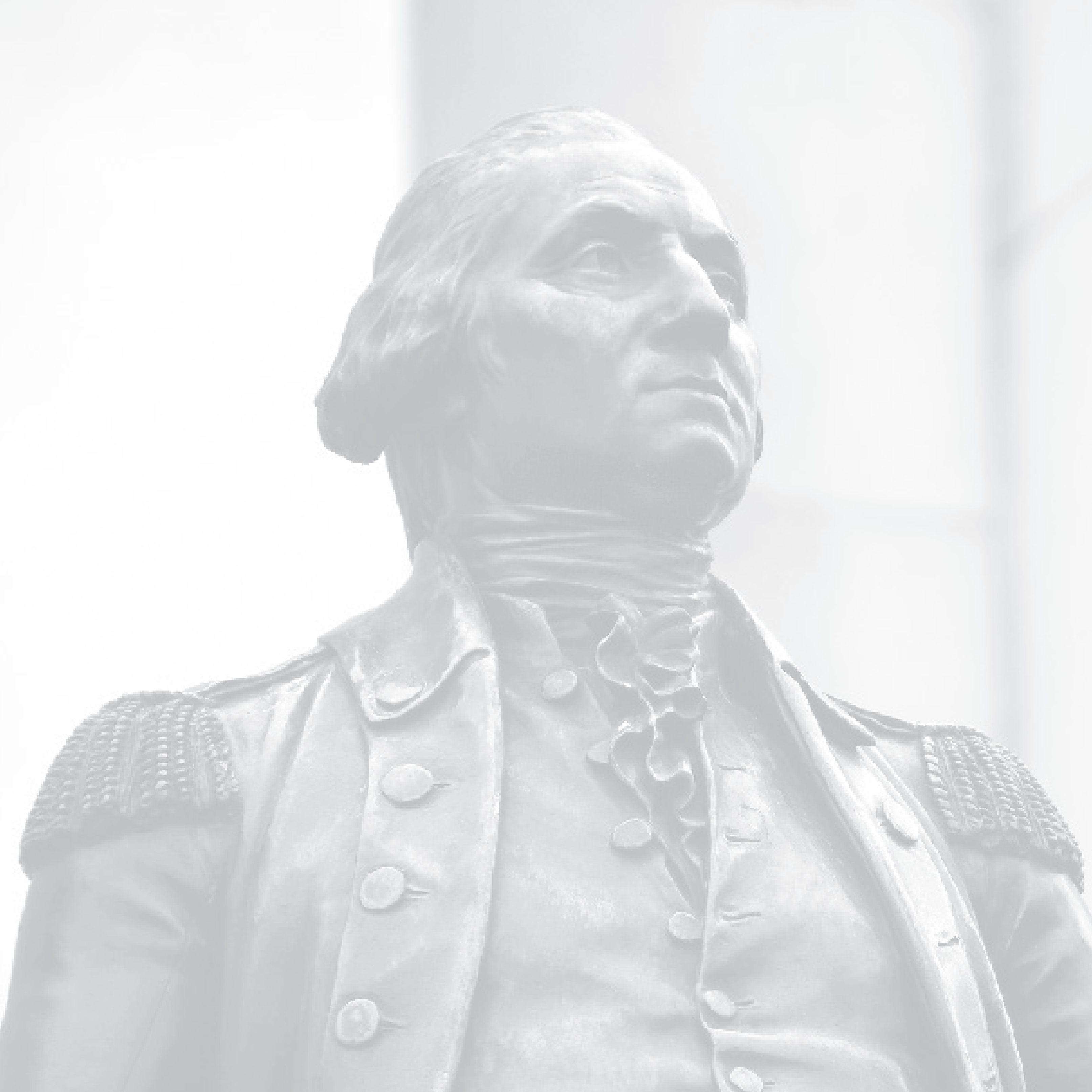
CAITLIN WOOD
ACCOUNTING ANALYST



DEANNA RICIOPPO
ADMINISTRATIVE
ASSISTANT



GINA DEANGELO
RECEPTIONIST &
OFFICE MANAGEMENT



"THE HARDER THE CONFLICT, THE GREATER THE TRIUMPH"
- GEORGE WASHINGTON

"NOTHING CAN STOP THE PERSON WITH THE
RIGHT MENTAL ATTITUDE FROM ACHIEVING THE GOAL"
- THOMAS JEFFERSON

"IF YOUR ACTIONS INSPIRE OTHERS TO DREAM MORE,
LEARN MORE, DO MORE AND BECOME MORE,
YOU ARE A LEADER"
- JOHN QUINCY ADAMS

"DO WHAT YOU CAN,
WITH WHAT YOU HAVE, WHERE YOU ARE"
- THEODORE ROOSEVELT

edisonpartners

SAVE THE DATE FOR OUR UPCOMING EDGE EVENTS

SALES & MARKETING ROUNDTABLE	CFO ROUNDTABLE	PRODUCT & ENGINEERING ROUNDTABLE
THURSDAY	WEDNESDAY	WEDNESDAY
10.17.19	10.23.19	10.23.19