



October 26, 2017

Topgolf | Edison, NJ

Agenda



SESSION		LOCATION
9:30 AM	Registration & Arrival	Main Level Hallway
10:00 AM	Welcome & Edison Update	Signature Room
10:10 AM	Keynote: <i>The Secret Weapon for Good Decision Making</i>	Signature Room
10:55 AM	Break & Move to Tracks	Main Level Lounge
11:10 AM	Breakout Sessions Part I <ul style="list-style-type: none">• CFO Track• CTO Track• Sales & Marketing Track	Signature Rm South Lower Level Lounge Signature Rm North
1:00 PM	Lunch Break & Networking	Main Level Bay Deck
1:30 PM	Breakout Sessions Part II	See Above
3:00 PM	Topgolf Play & Networking Reception	Main Level Bay Deck
5:00 PM	Departure	



TG Public



@edisonventure



#EdisonTopDogs

Combined Session Speakers



Kelly Ford Buckley
Partner

As part of the firm's Edison Edge platform, Kelly helps portfolio companies build and optimize scalable sales and marketing strategies and initiatives. Serves as director of two Edison companies. 23-year track record with established and emerging organizations, including SundaySky, Operative (former Edison company), LivePerson (LPSN), Groove Networks (now Microsoft) and IBM. BA, Michigan State. **LIFE BEYOND EDISON?** Bostonian at heart, counting Fenway and Nantucket as homes away from the 105-year-old fixer-upper shared with husband Ryan and two handsome labradors, Buster and Maxwell.



Tish Squillaro
CEO & Founder, CANDOR Consulting

Tish is referred to as the "CEO Whisperer" for her work counseling business owners in strategic planning, behavioral dynamics, resource, talent and project management. She is a sought after advisor to executives and CEOs of Fortune 500 companies worldwide including AppNexus, Ebay, Bristol Myers Squibb, Motorola and USA Today as well as venture backed start-ups.

An award-winning author, speaker and guest on radio and TV, Tish is a graduate of the University of Pennsylvania and a Smart CEO Philadelphia BRAVA award winner. She has offices in Philadelphia and New York City and can be reached at tish@candor-consulting.com.



Quick Break & Breakouts Part I

WHAT?	WHERE?	
CFO Track	Signature Room North	Same room on bar side half
Sales & Marketing Track	Signature Room South	Same room on far side half
CTO Track	Lower Level Lounge	Stairs in lobby near main entrance



TG Public



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#EdisonTopDogs



Signature Room South
11:00 AM – 3:00 PM

Topgolf | Edison, NJ

CFO Agenda



11:10-11:20am Welcome & Introductions

11:20-12:10pm **Getting Out of the Books: Partnering with the Business**

Rick Correia, CFO,  **MoneyLion**

12:10-1:00pm **Financial Storytelling**

Andrew Herning, SVP Finance,  **billtrust**

Alan Wink, Dir., Capital Markets,  **EISNER&ER**
ACCOUNTANTS & ADVISORS

1:00-1:30pm Lunch Break

2:40-3:25pm **Structuring Compensation to Incentivize & Retain**

Jon Reynolds, Associate,  **edisonpartners**

John Roberts, CFO,  **GAN**
INTEGRITY

3:35-3:00pm **The Road to Exit: Preparing & Executing the Process**

Michael Kopelman, General Partner,  **edisonpartners**

Pritam Advani, CEO,  **PCN Network**

Rick Glickman, COO/CFO, **MAGNE+IC™**

Aaron Levine, CFO, **BLU**  **VECTOR**

Tom Rauker, Global SVP, **dun&bradstreet**

3:00-5:00pm Networking Reception & Topgolf Play

5:00pm- Departure



CFO Speakers



Richard Correia
CFO, MoneyLion

Rick is Chief Financial Officer at MoneyLion, a leading mobile personal finance and consumer lending platform that empowers consumers to take control of their financial lives through free spending, saving and credit tracking tools, and smarter credit products. Founded in 2013 by a team of leading technologists and financiers, MoneyLion uses superior analytics and machine learning-based risk technology to gain a 360-degree view of its users' personal finances, enabling better underwriting and the development of tailored financial product offers.



Andrew Herning
SVP Finance, Billtrust

Andrew Herning is currently SVP of Finance at Billtrust. Accomplished and action-oriented finance executive with significant experience assessing, managing and directing business operations in mid-sized and global organizations



Alan Wink
Dir., Capital Markets, EisnerAmper

Alan assists clients with capital budgeting, capital structuring and capital sourcing. He has 20 years of financial and consulting experience, having served as Director of the Interfunctional Management Consulting Program at Rutgers Graduate School of Management, a program he helped build into one of the largest business school-based management consulting practices in the country. He started his career in accounting, spending six years on the audit staff of a Big 4 accounting firm and a Fortune 500 Company. Alan left the accounting field to expand his horizons in the area of Corporate Finance.



John Roberts
CFO, GAN Integrity

John has over 20 years of financial and operational experience within a diverse group of public and private high growth technology companies. He has been the CFO of 3 separate public companies and has a successful track record of value creation for stakeholders including raising multiple rounds of VC and PE backed financings, leading a top performing IPO and helping drive the successful sale of Right Media to Yahoo for \$850 million. He started his career at PwC where he ultimately rose to become an Audit Partner. John has a proven ability to successfully lead in demanding and rapidly changing environments.



Pritam Advani

CEO, PCN Network

Pritam is one of the co-founders of PCN Network and has been the visionary behind the company's unique business model. He is a seasoned executive with an extensive financial and business background. As a result of this experience, Pritam has been able to successfully interpret the current state of the title/mortgage services market and develop unique solutions, including developing PCN's proprietary Safe Escrow technology which provides the industry's first centrally controlled but locally executable funding solution.

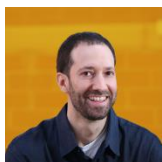
Prior to founding PCN Network, Pritam held senior executive positions at both private and public companies including Vice President of Business Development with NECHealth, Inc. in Atlanta, Georgia, Chief Financial Officer and/or Chief Operating Officer of E-Transport Inc., TechRx, Inc. and Cost Containment Corporation. He previously practiced as a CPA with Ernst and Young, LLP for over 10 years.



Rick Glickman

COO/CFO, Magnetic

Rick joined Magnetic from Operative where he worked with Edison Partners. Rick has held the position of CFO for the past 20 years across five companies. Before that, he held a variety of finance positions including working at an ad agency (JWT) for four years. This, combined with his experience at Operative gives Rick a great understanding of the advertising and marketing businesses we are in.



Aaron Levine

CFO, BluVector

As CFO at BluVector, Aaron is a seasoned financial executive with extensive experience in the technology industry. A strategic thinker with strong analytical, communication and managerial skills and the ability to bring issues to resolution. Proven ability to step into multiple financial roles and for finding workable solutions for complex problems. Skilled at partnering finance with core operations and developing productive cross-functional alliances.



Tom Rauker

Global SVP, Dun & Bradstreet

Tom is currently Global Senior VP of Alliances & Partnerships at Dun & Bradstreet (NYSE:DNB). Previously, he was CFO / COO at NetProspex, (former Edison company) until it was acquired by Dun & Bradstreet in 2015. By uncovering truth and meaning from data, D&B connects customers with the prospects, suppliers, clients and partners that matter most, and have since 1841. Nearly ninety percent of the Fortune 500, and companies of every size around the world, rely on our data, insights and analytics. For more about Dun & Bradstreet, visit DNB.com. Twitter: [@DnBus](https://twitter.com/DnBus)



Edison CFO Team



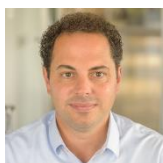
Jon Reynolds Associate & CFO Chair

Joined Edison in 2016. Splits his time into three areas: working alongside the portfolio's finance teams, performing accounting and financial reviews of potential investments, and other initiatives to build out the Edison Edge. 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.



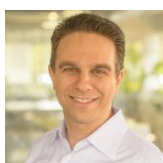
Eileen Covey Manager, Financial Analysis

Eileen is responsible for the firm's portfolio reporting and valuation processes and provides analysis on company results across 4 active funds. She focuses on compiling and analyzing portfolio company data to report to investors on a quarterly basis. She also manages employee benefits and business insurance. Previously, Eileen was an Accountant and Administrative (Operations) Coordinator for Optio Research which was acquired by Health Market Science, an Edison exited Investment. **LIFE BEYOND EDISON?** Eileen enjoys spending time with her husband Rich, son Jason and her stellar dog.



Joseph Giquinto Controller

Joe leads Edison's financial operations, including audit and tax compliance, domestic and foreign Limited Partner reporting and administration, SBA reporting, cash forecasting, accounting and analysis. Joe is also responsible for payroll and 401(k) administration. Previously, Joe worked as an Assistant Controller for VMS Fund Administration located in Princeton, NJ. **LIFE BEYOND EDISON?** Joe enjoys spending quality time with his wife, Cara and three young boys, and going to the shore as much as he can.



Michael Kopelman General Partner

Joined Edison in 2005. Leads Fintech investments and is Exit Leader, a member of the Edison Edge team that guides portfolio companies through the exit process. Serves on board of 4 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. BA UPenn; MBA Wharton. **LIFE BEYOND EDISON?** Married college sweetheart, Amy. Resides in Villanova, PA. Enjoys chasing after two kids (11 and 7 years old) and has bravely embraced eating tofu, quinoa, and green vegetables.



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Lower Lounge
11:00 AM – 3:00 PM

Topgolf | Edison, NJ

CTO Agenda



11:10-11:20am Welcome & Introductions

11:20-12:05pm **Cybersecurity: Preventing "Oh, Crap!" Moments**

Eldon Sprickerhoff, Chief Security Strategist, **esentire**[®]

12:10-1:00pm **Machine Learning: How to Make a Buzzword Actually Useful?**

Chee Mun Foong, CTO,  **MoneyLion**

1:00-1:30pm Lunch Break

1:30-2:15pm **DevOps & Cloud Computing: Delivering Great Product without Giving CFOs a Heart Attack**

Neil Singer, CIO,  **billtrust**[®]

2:15-3:00pm **IT Resourcing: The Art, Science & Frustration of Crafting a Technology Budget**

Jeff Gill, CIO,  **scivantage**

3:00-5:00pm Networking Reception & Topgolf Play

5:00pm- Departure

CTO Speakers



Eldon Sprickerhoff Chief Security Strategist, eSentire

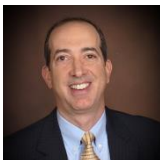
Eldon Sprickerhoff is the original pioneer and inventor of what is now referred to as Managed Detection and Response (MDR). In founding eSentire, he responded to the incipient yet rapidly growing demand for a more proactive approach to preventing and investigating information security breaches. Now with over twenty years of tactical experience, Eldon is acknowledged as a subject matter expert in information security analysis. Eldon holds a Bachelor of Mathematics, Computer Science degree from the University of Waterloo.



Chee Mun Foong CTO, MoneyLion

Leads a team of over 50 engineers and data scientists, to bring the forefront of artificial intelligence into consumer finance.

Applying years of complex and distributed system engineering experience, Chee led the team to create the most scalable and high frequency loan underwriting system examining thousands of variables of each applicant with effective use of machine learning algorithms. The underwriting system systematically lowers the risk of the portfolio and provides equitable credit consistently. The same analytics prowess is also being used to examine every financial data point to provide the most informed and accurate advices back to the consumer fostering healthy long term financial health. Prior to co-founding MoneyLion, he was a founding member of Simulex Inc.



Neil Singer CIO, Billtrust

Neil heads up Billtrust's Technology team and drives both technical innovation and efficiency. In his 30-year career, Neil has served as Chief Information Officer for startups, midsize companies, and divisions of Fortune 500 companies, including Cendant and General Electric. Prior to Billtrust, Neil served as CIO for Allconnect where innovative technology was the primary driver in the company's 700% growth over his tenure.

In addition to innovation and IT leadership, Neil brings information security expertise to Billtrust drawn from his time with MasterCard's fraud prevention team. He holds a Bachelor of Science degree in Industrial Engineering from Lehigh University.



CTO Speakers continued...



Jeff Gill
CIO, Scivantage

Versatile, strategic business leader with experience leading business & technology operations organizations for Fortune 100 and global CIO-advisory services with top tier management and strategy consulting company. Global IT executive, experienced in digital business transformation and innovation. Well versed in multinational acquisition and market growth strategies. 20+ years practical experience with IT strategy and operations. Industry expert in IT economics and strategies for managing the business technology spending

Edison CTO Team



Doba Parushev
Associate & CTO Chair

Doba joined Edison in 2016 and focuses on investments in the Enterprise Technology and Healthcare IT sector. Born and raised in Bulgaria, he began his career with Endeavor in Chile, where he assisted in the search, selection and support of promising startups. Later, Doba worked in management consulting with McKinsey & Company and got a taste for venture capital with AXA Strategic Ventures. He holds an MBA from Harvard Business School and a BSE from Princeton University. **LIFE BEYOND EDISON?** Contemplating the state of US infrastructure while driving down to Washington, DC to visit his girlfriend. Patiently learning how not to be horrible at golf.



Joe Allegra
General Partner

Joined Edison in 2001 and has led investments across Edison's targeted industry segments with primary focus on Enterprise Solutions. Led 30+ financings, served as a director of 25 companies and guided 16 to exit. Currently director of 2 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. BA Rutgers, MBA NYU. **LIFE BEYOND EDISON?** Joe and his wife Bobbie are golfers and especially enjoy playing 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.



EVER WONDER WHAT

8 CHARACTERISTICS

EDISON'S FASTEST GROWERS

HAVE IN COMMON?



① Investment in Sales and Product

Spend >2X more in Sales & Product than rest of portfolio.



② Higher ASP

Enjoy an average selling price (ASP) that is more than 2X higher than rest of portfolio.



③ Fast CAC Recovery

*Recover CAC at best-in-class rates (9-18 months). Rest of portfolio takes twice as long to recover CAC.***



④ Better Capital Management

Strong negative working capital.



**GROWTH
INDEX**
2016

FOR THE NEXT **4**,
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GROWTH INDEX
TODAY!

www.edisonpartners.com/growthindex




Signature Room North
11:00 AM – 3:00 PM

Topgolf | Edison, NJ

Sales & Marketing Agenda



11:10-11:20am **Welcome & Introductions**

Kelly Ford, Partner,  **edison**partners

11:30-12:15pm **Growing Your Addressable Market**


Erin Bosch, VP Sales Development,  **billtrust**

Inga Broerman, CMO,  **ALL TRAFFIC**
SOLUTIONS

Elle Woulfe, VP Marketing,  **LOOKBOOK**HQ

12:15-1:00pm **Sales, Marketing & Account-Based Revenue: A Love Story**

Trish Bertuzzi, President & Chief Strategist,  **The Bridge**
Group, Inc.


Patrice Greene, President,  **inverta**

1:00-1:30pm Lunch Break

1:30-2:15pm **Best Practices in Sales Recruiting**

Felix Knoll, CRO,  **GAN**
INTEGRITY

2:15-3:00pm **How to Get Bought (Not Sold) - A Sales & Marketing Perspective**

John Hartley Harris, CRO,  **esentire**

Mark Sangster, VP, Strategic Marketing,

3:00-5:00pm Networking Reception & Topgolf Play

5:00pm- Departure

Sales & Marketing Speakers



Erin Bosch

VP Sales Development, Billtrust

Experienced Vice President of Sales Development with a demonstrated history of working in the financial services industry.

Strong sales professional skilled in Coaching, Sales, Customer Relationship Management (CRM), Professional Services, and Account Management.



Inga Broerman

CMO, All Traffic Solutions

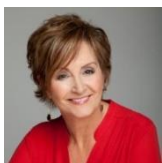
Broerman brings 20 years of marketing experience, specializing in innovative go-to-market and demand generation strategies that result in significant revenue and product line growth. She is responsible for the company's marketing programs, including global go-to-market strategy, market analysis, product/ solutions marketing, demand gen, branding, digital, public & analyst relations, and overall positioning. Prior to ATS, Broerman was a partner with Texas based Chief Outsiders, LLC, a national consulting firm of over 50 Fractional CMOs serving small and mid-sized companies in high-growth mode.



Elle Woulfe

VP Marketing, LookBookHQ

Elle is a revenue-focused marketer with expertise in digital marketing and demand generation. Equal parts creative wonk and marketing nerd, she's an expert at bringing sales and marketing teams together through shared process, goals and KPIs. As VP of Marketing for LookBookHQ, Elle is responsible for cultivating awareness and turning interest into pipeline. A veteran in the marketing technology industry, she previously held senior demand generation roles at Lattice Engines and Eloqua. She holds rather irrelevant degrees in English Literature and Religious Studies from Northeastern University.



Trish Bertuzzi

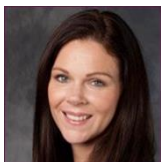
Pres. & Chief Strategist, The Bridge Group

Trish often remarks how lucky she is to work with an amazing team at The Bridge Group, helping sales and marketing leaders make the big decisions: on implementation strategy, performance improvement process, supporting technology, and metrics and measurement.

Over the last two decades, Trish has promoted inside sales as a community, profession, and engine for revenue growth. In the process, The Bridge Group has worked with over 200 B2B technology clients to build, expand, and optimize their inside sales efforts.

Through a combination of hard work and timing, Trish and her team's research and ideas have been featured on Inc.com, in Forbes, by associations like SLMA and AA-ISP, and across more than 68 sites in the sales and marketing world.

Sales & Marketing Speakers



Patrice Greene
President, Inverta

Patrice has dedicated her career to helping marketing organizations adapt to the rapidly evolving martech landscape.

She began her career with roles in both sales and marketing, and became an early adopter of marketing automation. Year after year, marketing executives expressed to her the need to find skills that could connect the dots between strategy and implementation. In 2015, she assembled a team of experts and co-founded Inverta with that mission in mind.



Felix Knoll
CRO, GAN Integrity

Felix is responsible for driving worldwide revenue growth, customer, and partner expansion for GAN Integrity. His 20-year

track record of success building, scaling, and leading high-performance teams spans both venture-backed and public companies. Prior to GAN, Felix ran worldwide sales at eSentire where he built the sales team from the ground up and 10X'ed the revenue. Before that he was the Director of Americas Sales for Symantec where he was recognized in 2012 as the top national sales leader across North America.



John Hartley Harris
CRO, eSentire

John leads the revenue teams and drives the company's growth and market expansion. Through his 20 years of leadership-level experience, he has led companies through the full spectrum of growth internationally including business combinations and IPO. He is a proven business builder of early stage, high-growth companies, influencing growth from start-up through to enterprise value (in the billions). Prior to eSentire, John proudly contributed leadership to Descartes (DSG:NASDAQ-1998, TSX-1997), ThoughtCorp (acquired by EPAM:NYSE) and RIS (acquired by Sierra:Private).



Mark Sangster
VP Strategic Marketing, eSentire

As a member of the LegalSec Council with the International Legal Technology Association (ILTA), Mark is a cybersecurity evangelist who has spent significant time researching and speaking to peripheral factors influencing the way that legal firms integrate cybersecurity into their day-to-day operations. In addition to his passion for cybersecurity, Mark's 20-year sales and marketing career was established with industry giants like Intel Corporation, BlackBerry and Cisco Systems. Mark's experience unites a strong technical aptitude, and an intuitive understanding of regulatory agencies.



Edison Sales & Marketing Team



Kelly Ford Buckley Partner

As part of the firm's Edison Edge platform, Kelly helps portfolio companies build and optimize scalable sales & marketing strategies and initiatives. Serves as director of 2 Edison companies. 23-year track record with established and emerging organizations, including SundaySky, Operative (former Edison company), LivePerson (LPSN), Groove Networks (now Microsoft) and IBM. BA, Michigan State. **LIFE BEYOND EDISON?** Bostonian at heart, counting Fenway and Nantucket as homes away from the 105-year-old fixer-upper shared with husband Ryan and two handsome labradors, Buster and Maxwell.



Elizabeth Stotler Marketing Director

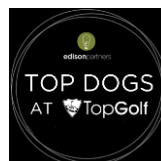
Responsible for a myriad of programs driving brand awareness, interest and engagement with Edison's target audiences, as well as improving the visibility and presence of the company on the web. 12-year track record within tech; including Oracle, LivePerson, DataXu, and NICE. BA, Spanish, Hartwick College; MS, Communication and Media Technologies, Rochester Institute of Technology. **LIFE BEYOND EDISON?** Changing diapers tops the list this year. Elle Parker Stotler was born March 3rd and is the happiest baby who is finally sleeping through the night (sometimes). Husband, Ryan and pitbull, Jax, love her as well.



Lauren Passannante Marketing Coordinator

Joined Edison in January of 2016. She assists in the coordination and planning of Edison's campaigns and events while supporting three investment professionals. She holds a BA in Sociology from Rider University. **LIFE BEYOND EDISON?** Passion for food and learning about different cultures. She has traveled to 8 countries and plans to visit all 50 states at least once.

Attendees



COMPANY	FIRST NAME	LAST NAME	EMAIL ADDRESS
All Traffic Solutions	Inga	Broerman	ibroerman@alltrafficsolutions.com
All Traffic Solutions	Mike	Farley	mfarley@alltrafficsolutions.com
All Traffic Solutions	Jim	Harriot	jharriot@alltrafficsolutions.com
All Traffic Solutions	Andy	Souders	asouders@alltrafficsolutions.com
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Amazon	Derek	Kleinow	dkleinow@amazon.com
Amazon	John	Pignata	pignataj@amazon.com
Axial	Ryan	Mang	ryan.mang@axial.net
Axial	Kristina	Mayne	maynek@gmail.com
Axial	Matt	Metalios	matt.metalios@axial.net
Axial	Clayton	Patton	clayton.patton@axial.net
Billtrust	Erin	Bosch	ebosch@billtrust.com
Billtrust	Jim	Eichmann	jime@billtrust.com
Billtrust	Andrew	Herning	aherning@billtrust.com
Billtrust	Neil	Singer	nsinger@billtrust.com
BluVector	Aaron	Levine	aaronmlevine@hotmail.com
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Dot Line Inc.	Ted	Nadeau	trnadeau@gmail.com
Dun & Bradstreet	Tom	Rauker	RaukerT@DNB.com
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EisnerAmper	Alan	Wink	alan.wink@eisneramper.com
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eSentire	Eldon	Sprickerhoff	eldon.sprickerhoff@esentire.com
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iQ Media	Ashley	Deibert	adeibert@iq.media



iQ Media	Tom	Hopkins	thopkins@iq.media
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ItemMaster	Gregor	Shields	gshields@itemmaster.com
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The Winslow Group	Teresa	Winslow	tfwinslow@aol.com
Traverse	James	Alvord	james@traversedm.com
Universal American Corp.	Adam	Thackery	adam.thackery@verizon.net
VirtualHealth	Tomer	Benami	tomervirtualhealth.com
VirtualHealth	Rita	Lebedeva	rita@virtualhealth.com
VirtualHealth	Dana	Levin-Robinson	dana@virtualhealth.com
VOOM Carpool for Kids	Debbie	Piperno	debbie@voomcarpool.com
Wyng	Bridget	Duffey	bridget.duffey@wyng.com
Wyng	Deirdre	Mills	deirdre.mills@wyng.com
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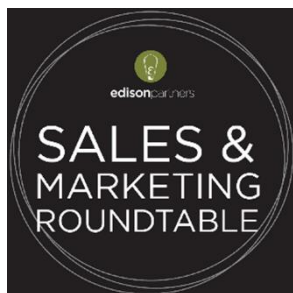
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DON'T FORGET TO SAVE THE DATES...



APRIL 5, 2018

Convene | Philly, PA



APRIL 19, 2018

Princeton, NJ



MAY 3, 2018

Princeton, NJ

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