

# AGENDA

**Monday, March 5, 2007**

**6:30 PM** REGISTRATION AND WELCOME RECEPTION / DINNER      Horseshoe Garden

**Tuesday, March 6, 2007**

**6:30 AM** BREAKFAST BUFFET      Viennese Terrace

**7:30 AM** WELCOME      Viennese Ballroom  
Donald W. Phillips  
WP GLOBAL PARTNERS

**7:40 AM** RELEVANT INVESTMENT OPPORTUNITIES TODAY  
Michael Milken  
MILKEN INSTITUTE

## CLEAN TECHNOLOGY

**8:00 AM** IS CLEAN TECH "THE NEXT BIG THING?"  
Greg Oberholtzer  
WP GLOBAL PARTNERS

DEFINING CLEAN TECHNOLOGY  
Russell Landon  
CANACCORD ADAMS

THE EVOLUTION OF THE TECHNOLOGY AND OPPORTUNITIES  
David F. Lincoln  
DFJ ELEMENT

WHY MAINSTREAM VCS ARE LOOKING AT CLEAN TECH  
Alain Harrus  
CROSSLINK CAPITAL

GENERAL DISCUSSION  
Ceila Chapman  
WP GLOBAL PARTNERS

## FINANCIAL SERVICES

**10:30 AM** AN INDUSTRY IN TRANSITION  
Greg Jania  
WP GLOBAL PARTNERS

# AGENDA

Tuesday, March 6, 2007

Continued

## FINANCIAL SERVICES

EVOLUTION OF THE FINANCIAL SERVICES INDUSTRY

Clinton J. Kendrick

WEALTHTRUST

Viennese Ballroom

RETAIL IS KING

Dwight Badger

ADVANCED EQUITIES

IMPACT OF TECHNOLOGY AND OUTSOURCING

William Crager

ENVESTNET ASSET MANAGEMENT GROUP

CHANGES IN THE GLOBAL INSURANCE INDUSTRY

Geoffrey O. Kalish

AQUILINE

GENERAL DISCUSSION

Joseph F. Berry

WP GLOBAL PARTNERS

**1:00 PM** LUNCH

Courtyard

## MIDDLE EAST

**2:00 PM** IMPACT OF MIDDLE EAST ON THE GLOBAL ECONOMY

Jon Mansfield

WP GLOBAL PARTNERS

Viennese Ballroom

BACKGROUND FOR MIDDLE EAST INVESTING

Marvin Zonis

UNIVERSITY OF CHICAGO

QUANTIFYING POLITICAL AND ECONOMIC RISK

Giandomenico Picco

GDP ASSOCIATES

GENERAL DISCUSSION

Bassam B. Barazi

WP GLOBAL PARTNERS

**5:00 PM** SESSION ENDS

**6:30 PM** RECEPTION & BANQUET DINNER

Promenade Room

# AGENDA

Wednesday, March 7, 2007

**7:00 AM** GENERAL PARTNERS AND INVESTORS BREAKFAST

Viennese Terrace

**8:00 AM** RECENT INVESTMENT ACTIVITY

Viennese Ballroom

Donald W. Phillips

WP GLOBAL PARTNERS

## VENTURE CAPITAL

Celia Chapman

WP GLOBAL PARTNERS

Ken Pelowski

PINNACLE VENTURES

Terry Opdendyk

ONSET VENTURES

## LEVERAGED BUYOUTS

Greg Jania

WP GLOBAL PARTNERS

David Webb

SFW CAPITAL

Michael Fourticq

HANCOCK PARK CAPITAL

## CO-INVESTMENTS

Greg Oberholtzer

WP GLOBAL PARTNERS

Philip Scott

JUICE TYME

Scott Sellers

ENCORE CONSUMER CAPITAL

## INTERNATIONAL

Tom Thompson

WP GLOBAL PARTNERS

Ta-lin Hsu

H&Q ASIA PACIFIC

**11:15 AM** CONCLUDING REMARKS

Donald W. Phillips

WP GLOBAL PARTNERS

**12:00 PM** SESSION ENDS

For further information on the Investor Conference,  
please contact WP Global Partners at: [info@wpglobalpartners.com](mailto:info@wpglobalpartners.com)