



Su Negocio™

Assisting Latino Business Owners

Agenda

Hard Rock Hotel Chicago, July 12, 2016

7:00 am—8:00 am Breakfast & Networking

8:00 am—8:45 am Roundtable Panel Discussion, featuring:

Nicholas Delgado, Founder and Principal, Dignitas

Manuel Flores, Partner, Banks & Financial Institutions Practice Group, Arnstein & Lehr

Roxanne Nava, Chief Small Business Officer, City of Chicago

9:00 am—9:30 am Breakout Session #1 (Start-up & Growth tracks)

9:30am—10:00 am Breakout Session #2 (Start-up & Growth tracks)



Roundtable speaker bios

Nicholas Delgado is the founder and principal of Dignitas, an investment banking and family office platform for growth oriented founder and family run businesses. From capital raises to selling companies to helping operators think like private equity pros, Nick has become a thought leader and go to advisor for high growth companies and their founders. Nick has been featured in local and national publications from the Chicago Tribune to the Wall Street Journal, is a regular speaker on issues of valuation and investment allocation, and in 2014, Investment News recognized Nick as one 40 high performing finance professionals across the country under the age of 40. Prior to founding Dignitas, Nick counseled high net worth families as a Wealth Management Advisor at the private banks of Morgan Stanley and Merrill Lynch. Nick graduated with a B.A. from The University of Michigan, and when not working with clients, Nick enjoys practicing improv at Second City, organizing the Chicago Supper Club, and training for marathons.

Manuel Flores is a partner in the Banks and Financial Institutions Practice Group of Arnstein & Lehr's Chicago office. His practice concentrates on banking and consumer finance regulation and compliance on a state and national level. Manny also assists the firm in the areas of government affairs, land use and zoning, and professional licensure and enforcement. He is also actively involved on the Boards of Directors for Notis Global, Dominican University, Environmental Law & Policy Center, ChildServ, and World Chicago. Prior to joining the firm, Manny served as the Acting Secretary at the Illinois Department of Financial and Professional Regulation. As a regulator, Manny developed and implemented Illinois statewide policy for the financial services industry. Working with federal banking regulators, he supervised examinations, major investigations and enforcement actions of depository institutions and consumer finance companies relating to prudential and regulatory compliance matters.

Roxanne Nava is the Chief Small Business Officer for the City of Chicago. A native Chicagoan, Nava brings a decade of experience supporting small businesses and entrepreneurs at the state government level, serving as the Director of the Illinois Financial Institutions and formerly as the Assistant Director of the Illinois Department of Commerce & Economic Opportunity. Before joining the State of Illinois, Nava was a Vice President of The Northern Trust Company, where she sourced, underwrote and managed commercial lending relationships in the Chicago market. At The Northern Trust Company, Nava led Latino outreach, increasing Latino business clients by 50% during her tenure. Nava has been recognized for her accomplishments from the Illinois Hispanic Chamber of Commerce and serves on the board of Leadership Greater Chicago. She received her Bachelor's degree at DePaul University.

Breakout session descriptions

Start-up Track

Session #1: Creating Your Financial Projections: Having a financial plan will not only help guide business development decisions and monitor results, but it will also help you match your business concept with personal income goals. In this session, you'll learn the importance of financial planning, how to build your financial model, and how to understand financial statements, including an income statement, cash flow statement, and balance sheet.

Session #2: Identifying Funding Sources & Next Steps: In this session, you will learn about accounting and bookkeeping systems, sources of capital, the six C's of credit, and banking relations. You will also understand the rigor behind financial statement analysis to determine the most effective ways to access capital to grow your business.

Growth Track

Session #1: Protecting Your Business From the Unexpected: Think about how an unplanned for event could impact the success of your business and the income it generates for your family and employees. Learn how having plans in place, such as a buy-sell agreement and key person insurance, can help protect your family and your business from life's many uncertainties.

Session #2: The Importance of Knowing What Your Business Is Worth: When you know what your business is worth, you have a more realistic perspective from which to plan for the future direction of the business, as well as the future income needs of you and your family. This session will highlight how knowing the value of your business can help you develop strategies for effective business succession, retirement and estate planning.