

Columbia Innovation Roundtable cordially invites you to

STAY RELEVANT | ACCESS THE FUTURE

Join a select group of executives and investors as together we explore industries in the midst of disruption and renewal. Be empowered.

THEME: FINTECH TRENDS



Technology has upended the world of finance. Stretched legacy infrastructure, moments of identity crisis and organizational mutation are all markers of a banking industry in flux. It is a maddeningly magical

time! The CEO of world's largest credit card issuer, Citi, states emphatically that the plastic cards will disappear. The CEO of the second largest currency trading platform, JPMorgan, denigrates one of the fastest growing crypto-currencies, Bitcoin, as "a fraud". Arguably the most prestigious investment bank, Goldman Sachs, enthusiastically leaps into the moribund world of consumer lending launching its lending arm, Marcus:. Perhaps as one industry heretic suggested...banks are no longer in the financial industry but rather... in the technology industry [?]

SPEAKER: LUIS VALDICH of CITI VENTURES

Luis Valdich, Managing Director of Citi Ventures. <http://www.citi.com/ventures/>. Luis leads the New York office and venture investing activities in the US east of the Rockies and Europe. Citi Ventures invests in and builds deep domain expertise in five focus areas: Financial Services & Technology, Commerce & Payments, Marketing & Customer Experience, Data Analytics & Machine Learning, and Security and Enterprise IT.

FEATURED FIRM: CITIGROUP (NYSE: C) - CITI VENTURES

Citigroup Inc. is a diversified financial services holding company that provides various financial products and services for consumers, corporations, governments, and institutions worldwide. The firm generated net revenues of \$62.5 billion in revenue in 2016. The firm's corporate venture capital arm, Citi Ventures, invests in and builds deep domain expertise in five focus areas:

- Financial Services & Technology,
- Commerce & Payments,
- Marketing & Customer Experience,
- Data Analytics & Machine Learning, and
- Security and Enterprise IT.

Citi Ventures brings innovative insights into CitiCorp and to its clients in order to accelerate adoption of new technologies and business models. It is committed to championing innovative entrepreneurs who are creating a more convenient, safe and valuable financial services ecosystem and enable Citi's portfolio companies to grow and scale by helping them refine their products and processes and by making introductions within Citi and Citi's broader franchise. Citi Ventures' model features three characteristics: **(1) Timeliness and flexibility; (2) Value-add, leveraging Citi and its broader franchise for commercialization opportunities, and (3) Do-no-harm (no strings attached).**

Citi Ventures, which accelerates innovation and fuels growth at Citi, combines external innovation with Citi's 200-year legacy to create a systematic approach for conceiving and scaling novel solutions for Citi's clients and customers. Citi's unique interconnected model goes beyond the Venture Investing function, to include "catalysts" who actively engage in driving commercialization opportunities with Citi's businesses. Citi also has a portfolio of external and internal engagements to conduct early-stage research and experimentation with disruptive technologies relevant to Citi's future.



BIOGRAPHY OF SPEAKER: LUIS VALDICH OF CITI VENTURES



Luis Valdich joined Citi Ventures in late 2015 as a Managing Director and leads its New York office and venture investing activities in the US east of the Rockies and Europe. Luis invests in FinTech (including InsurTech and ecommerce) and Data Analytics/Machine Learning (focused on applications relevant to financial services). Luis partners with the VC/startup ecosystem and with Citi colleagues to invest in great startups and help maximize their potential while helping Citi's franchise be more innovative. Luis co-led Citi Ventures' investment in Clarity Money where he is a board observer.

From 2008 to 2015, Luis founded and ran JPMorgan Chase's Strategic Investments group; he was part of the investment committee, made over 40 investments, and participated in several boards. Previously Luis was a consultant at McKinsey and venture capital principal at Softbank.

Luis received his MBA from Harvard University and BA from Franklin & Marshall College.



SCHEDULE:

- 6:30 - 7:00pm Introductions - (Welcome Remarks)
- 7:00 - 8:15pm Presentation - (Roundtable Discussion)
- 8:15 - 8:30pm Conclusion - (Closing Remarks)

OUR PURPOSE:

>> Stay Relevant.

- How can you maintain and improve your personal brand regardless of the firm you are currently with? Our speaker has a sterling reputation earned from tenures at SoftBank, JPMorgan and Citi.

>> Access the Future.

- From start-ups in Silicon Valley to established players on Wall Street, innovators are applying their creativity and technical ingenuity along the financial services value chain. Fintech promises to democratize financial services; to deliver consumers with more choices; and to make the financial system more resilient.

OUR MEMBERSHIP:

Columbia Innovation Roundtable – is a Columbia University Club members-driven group, housed in the University of Pennsylvania Club of NYC – invites you to experience our distinctive innovation-focused, invitation-only executive roundtables. Join Columbia University alumni, faculty and industry executives for a stimulating discussion on Financial Technology (FinTech)

OUR SHARED VALUES:

- **Limited** - Each roundtable is unique and limited to a total of 25 invited members
- **Interactive** - Active participation by each member enhances our collective perspective
- **Off-the-Record** - All discussions are strictly off-the-record and confidential
- **Non-Solicitation** - No solicitation or investment pitches are permitted



SAVE THE DATE:



Columbia Innovation Roundtable

Address:

Harvard Club of New York City
35 West 44th Street
New York, NY 10036

Date:

Monday, November 13, 2017

Theme:

FinTech Trends

To request an invitation, please email
RSVP@ColumbiaCVC.com

