

CONFERENCE INFORMATION PACKAGE



About America East 2023

America East Small Business Lenders Conference 2023 will take place at the Encore Boston Harbor, a Wynn Resort. All participation will be offered in-person*.

This cost-efficient opportunity to train your entire SBA lending team offers sessions for every role and level in SBA lending from underwriters, processors and closers to program managers, directors and bank Presidents.

Join over 400 new and seasoned SBA lenders and industry professionals from over 100 organizations, from Maine to Florida on the Eastern Seaboard, for networking, educational growth, updates on new SBA programs and initiatives, and training on a variety of SBA policies and procedures. Our agenda is comprised of industry experts, SBA lenders, attorneys and SBA officials.

**At this time, our objective is to conduct our conference entirely in-person without virtual access. No COVID-specific restrictions or procedures are currently in place, and if this changes, all attendees will be notified.*

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AMERICA EAST SMALL BUSINESS LENDERS CONFERENCE

AUG 16TH–18TH, 2023

Encore Boston Harbor

Itinerary

WEDNESDAY, 8.16	THURSDAY, 8.17	FRIDAY, 8.18
<p>8:30 – 4:30 pm SBA Training Classes <i>Optional adjunct training for an additional fee if available (training details forthcoming).</i></p> <p>2:00 – 5:00 pm Exhibitor Check-In/Setup</p> <p>2:00 – 7:00 pm Attendee Check-In</p> <p>5:30 – 7:00 pm Welcome Reception <i>Join our Exhibitors for drinks, hors d'oeuvres and networking. Reception sponsored by M&T Bank.</i></p> <p><i>*Schedule subject to change</i></p>	<p>7:30 – 4:00 pm Registration Desk Open</p> <p>7:30 – 8:45 am Breakfast & Exhibits</p> <p>9:00 – 10:30 am Opening Session</p> <p>10:30 – 11:00 am Morning Break & Exhibits</p> <p>11:00 – 12:15 pm Breakout Sessions</p> <p>12:15 – 1:30 pm Networking Lunch & Exhibits <i>Enjoy lunch while networking with colleagues and exhibitors.</i></p> <p>1:30 – 2:45 pm Breakout Sessions</p> <p>2:45 – 3:15 pm Afternoon Break & Exhibits</p> <p>3:15 – 4:30 pm Breakout Sessions</p> <p>6:00 – 9:00 pm Seafood Boil Dinner & Party <i>Join us for an authentic, casual Boston Harbor seafood boil with all your favorite fresh catches (we will have non-fish foods as well), LIVE entertainment and fun on the South Lawn – stunning harbor views included!</i></p>	<p>7:30 – 10:30 am Registration Desk Open</p> <p>7:30 – 8:45 am Breakfast & Exhibits Open</p> <p>9:00 – 10:15 pm Breakout Sessions</p> <p>10:30 – 12:00 pm Closing Session</p>

Accommodations

Encore Boston Harbor, A Wynn Resort

1 Broadway
Everett, MA 02149
857-770-7070

Encore Boston Harbor invites relaxation, fun and excitement at every turn. From lavishly appointed rooms and extraordinary 16 onsite restaurant options for casual and fine dining to thrilling games, spa treatments and chic shopping, every demand is anticipated, and every need is met with impeccable service. Only in Boston, only at Encore Boston Harbor, a hospitality experience that defines Five-Star. The entire hotel, including the onsite casino is all NON-SMOKING and FREE self and valet parking is available to all overnight guests!

Conference Rate: \$259

Rates start at \$259 for standard King room. Per diem government rates also available. Reservations can be made online:

[CLICK HERE TO RESERVE YOUR ROOM](#)



Conference Networking & Sponsored Events



Welcome Reception

Sponsored by:

M&T Bank
Understanding what's important®

WEDNESDAY 5:30 – 7:00 pm

After checking in at our registration desk, join us for our Welcome Reception in the Exhibit Hall, sponsored by our presenting Diamond sponsor, **M&T Bank**. Our Exhibitors will be ready to greet you with cocktails and hors d'oeuvres.

This is a great opportunity to establish new connections and catch up with colleagues. Exhibitors will be giving away some great prizes, and we'll be giving away a grand prize to the winner of our Event Game during Friday's Closing Session, so be sure to stop by each booth for answers to the game challenges.



Networking Lunch

THURSDAY 12:15 – 1:30 pm

Take a break from learning to grab a bite and meet with colleagues and exhibitors in the Exhibit Hall before the afternoon sessions begin.



Seafood Boil & Party

THURSDAY 6:00 – 9:00 pm

Join us for a lively Seafood Boil picnic dinner out on the South Lawn, facing the Boston Harbor. A full dinner with fresh seafood and non-seafood options, cocktails, live entertainment, fun and stunning views are all included! Cash bar available once drink tickets have been utilized. Included for all conference attendees and registered/paid guests. Sponsored by our Diamond Sponsor, **M&T Bank** and our Platinum Sponsors.

If you are planning a sponsor-hosted event, contact AmericaEast@EventfullyYourz.com before beginning your planning so we can ensure there is NO OVERLAP with scheduled conference event times. We are happy to promote events hosted by conference sponsors but cannot promote/endorse any event hosted by non-sponsors.

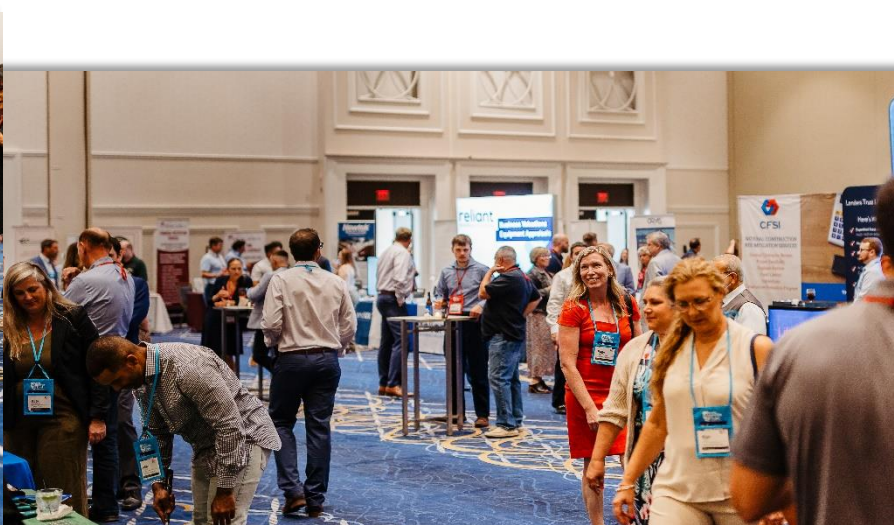
Sponsor & Exhibitor Opportunities

Our objective is to conduct an all in-person conference. Our **favorable registration policy** gives attendees and sponsors the **ability to cancel for any reason with a partial or full refund based on the time of cancellation. See terms & conditions at the end of this document. Sponsorship will remain open until June 30th or once sold out.**

Benefits	Diamond (Exclusive) SOLD OUT! \$2,500	Platinum \$7,500	Gold \$5,000	Silver \$3,000	Bronze \$1,000
Logo incorporated into Conference Logo as Presenting Sponsor	Yes	No	No	No	No
Free conference registration	5	4	3	2	1
Discounted registration for additional company attendees	\$449	\$449	Current lender rate	Current lender rate	\$699
Exhibitor Table <i>(location choice will be awarded in order of sponsor level and registration date)</i>	Included with 1 st choice location	Included with choice of location after Diamond level	Included with choice of location after Platinum level	Included (location assigned)	+\$800 (location assigned)*
Logo on Conference Materials	Name Badges Attendee Bags Banners Mini Agendas	Banners Mini Agendas	Banners Mini Agendas	No	No
Advertising for your Sponsored Event	Yes	Yes	Yes	No	No
Rotating digital ad in exhibit hall & banner in mobile/virtual platform app	Yes	Yes	Yes	No	No
Logo & sponsor profile in mobile/virtual platform app & inclusion in Event Game	Yes Full Profile & Game	Yes Full Profile & Game	Yes Full Profile & Game	Yes Limited Profile	No
Featured in Conference Emails	(2) Articles/Ads, Logo with link to your website	Logo with link to your website	Logo with link to your website	Logo with link	Logo with link
Event Sponsorship(s)	Welcome Reception Opening Session Keynote Session Seafood Boil Party	Seafood Boil Party Closing Session	Networking Lunch Breaks	Breakfasts	N/A
Recognition during opening & closing	Verbal & Logo	Verbal & Logo	Logo	Logo	Logo
Speaking Opportunity	Opening Session (5 mins) Moderate Breakout	Moderate Breakout	No	No	No
Attendee List Availability	4 weeks prior 2 weeks prior 1 week prior	2 weeks prior 1 week prior	2 weeks prior 1 week prior	1 week prior	1 week prior

*Bronze level may purchase an exhibit booth ONLY if space is not sold out as of June 15, 2023

**Sponsorships must be paid in full within 60 days of registration date, or by June 15th, whichever is sooner, in order to retain sponsorship promotion and benefits and avoid automatic cancellation.



What Our Sponsors are Saying

"I felt the conference was a huge success. As the lead sponsor, I thought we got the bang for our buck and appreciated everything EventfullyYourz and the Executive Board did to promote 44 Business Capital. This continues to be one of the best (if not the best) regional SBA conferences in the country."

"I have been going to these for over 10 years and this was the best event thus far! Looking forward to next year's conference! (I already registered!)"

"It's a great conference and it's great to see that it grows every year."

"I thought the conference was really well done. I met a lot of people, got some good leads and had a lot of fun!"

"I think conference was very well done. All things ran smoothly and there was an abundance of time with attendees in various breaks etc."

"The conference was well run and an excellent source of news/training. The America East Board and EventfullyYourz were very organized and on top of things. Thanks to both of them for an excellent conference."

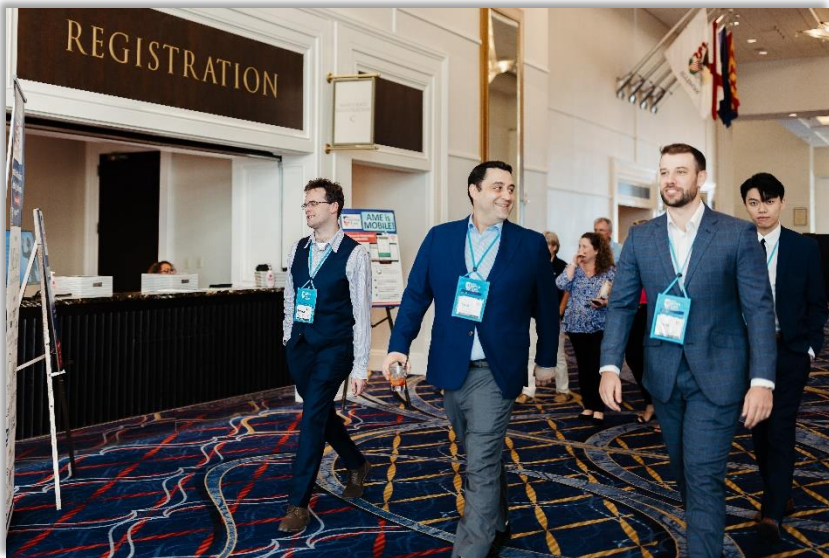
"Once again, I thought the show was well done as it has been in the past and I thought the exhibit hall experience was comfortable and not overcrowded allowing for easy networking."

How to Sponsor

Visit our website at www.AmericaEast.net and register online. Payment can be made by check or credit card. Sponsorship recognition will start once payment is received.

Sponsorship deadline is June 30th.

If the conference must be changed to an ALL-VIRTUAL format only due to circumstances outside the organizer's control, the aforementioned sponsorship fees and benefits will be adjusted as follows and an applicable refund will be provided for the difference in cost from amount already paid. If sponsors choose not to participate in the all-virtual format, refunds cannot be provided.



To discuss sponsorship opportunities or other conference questions, contact our Conference Administrators at:

AmericaEast@EventfullyYourz.com



Training Opportunities

America East provides training for all levels and roles in SBA lending. Speakers from **SBA headquarters**, SBA servicing offices and industry professionals present relevant and timely updates across all aspects of the SBA 7(a) and 504 lending process in both general and breakout sessions. From origination to liquidation, audit and everything in between, we commit to providing in-depth updates and training to your entire staff.

In the past, speakers from SBA headquarters speakers have included SBA Chief of Staff, Associate Administrator for the Office of Capital Access, 504 Policy & Program Chief, 7(a) Policy & Program Chief, Director of the Office of Financial Assistance, and Director of the Office of Credit Risk Management, among others.



What Our Attendees are Saying

"The Conference continues to be worthwhile and beneficial - I always return with plenty of information to improve how we do things. I plan on continuing to attend future conferences."

"I really enjoy this conference. It's a good size for good discussion, and it's a great opportunity to connect with our more local peers for networking and to connect with our peers for sharing ideas and collaboration."

"Great job by the organizers again! Thank you for all your hard work. This conference gets better every year!"

"It was wonderful to have so many SBA representatives at this conference. The location allowed many to join us and it was great networking with them."

"I feel you did an excellent job covering the entire SBA program and helping local lenders who cannot attend national sites get informed."

"The updates in a smaller regional setting than NAGGL allows for a different conversation from a different perspective. It's such a valuable experience! I love going to NAGGL too, but this offered a different experience, which I appreciated very much."

America East partners with SBA Headquarters and Industry leaders to provide adjunct training as well as pertinent updates from Capitol Hill. We've been fortunate to have SBA leadership attend and provide up close and personal updates on all the relevant Hot Topics.



Our **BREAKOUT SESSIONS** provide a deep dive into a variety of current topics for all roles and levels. Some of last year's topics included:

- Recent Proposed 7(a) Rule Changes
- Community Advantage & Beyond 7(a)
- 504 & 7(a) Debt Refinance: Avoiding Common Eligibility Pitfalls
- Guaranty Purchase: Hot Topics
- Business Acquisitions & What to Look Out For
- Small Loans: Increasing Volume & Decreasing Headaches
- Workouts & Forbearance: Preserving your Guaranty
- Underwriting 7(a) Loans: Questions You Should be Asking
- 7(a) and 504 Secondary Market Update
- 7(a) Closings: Making Sure your Ducks are in a Row
- 7(a) Ongoing Monitoring & Servicing
- 504 Origination & Marketing: How to Win Deals to Benefit your Borrowers



**This year's topics to be communicated at a later date.*

How to Register

Visit our website at www.AmericaEast.net and register online. Conference tickets are for in-person attendance only. Payment can be made by check or credit card for Sponsorships and credit card only for attendees. Cancellations or substitutions may be submitted in writing via email to AmericaEast@Eventfullyyourz.com. *See terms and conditions regarding cancellation policy on page 8.*

Lender: Early Bird*	\$449	Expires February 28 th
Lender: Regular Rate*	\$499	Expires June 30 th
Lender: Late Rate*	\$599	Expires August 1 st or when sold out
Non-Sponsoring Vendor	N/A	All non-lenders or government employees (i.e., service providers) must register as BRONZE level sponsors for \$1000 with additional a rate of \$599 after sponsorship registration. Expires (same as registration end date)
Government Employee	\$379	Includes SBA, SBDC or University Employees
Guest Ticket	\$200	Includes both evening events only for non-industry professionals, such as a spouse, friend or family member. Colleagues must register using a lender or non-lender attendee ticket.

**Applicable for bank and non-bank lenders, CDCs, SBDCs and additional sponsor attendees beyond the included or discounted attendees. Walkup registrations will NOT be available.*

Registration CLOSES August 1st or when SOLD OUT

Space will be limited, so register early!



America East 2023 Terms & Conditions:

Please review the policies below prior to registering.

IN-PERSON ATTENDANCE ONLY: The 2023 America East Small Business Lenders Conference registration includes in-person attendance only; virtual attendance is not an option in any circumstance other than providing remote access to a particular session for a participating speaker. Currently, there are no specific COVID-related safety measures or requirements in place for in-person attendees, subject to change. The conference will abide by whatever requirements are in place in the hosting city and/or venue(s) and will communicate those requirements to attendees if and when they change as soon as readily possible. Attendees agree to abide by any and all safety measures as deemed necessary by the conference organizers.

CONFERENCE PAYMENTS: All conference registration and sponsorship payments are processed by our third-party event management firm, EventfullyYourz, on behalf of America East, Inc.. Note that credit card statements may reflect "EventfullyYourz Event Management" or similar description as the merchant name. AMERICA EAST, INC. reserves the right to cancel any registration or sponsorship that is not paid according to payment due dates, retaining any funds already received. For conference or payment related questions, please contact AmericaEast@eventfullyyourz.com or call 844-887-6477.

COVID-19 RELEASE WAIVER: I understand that my in-person attendance at the 2023 America East Small Business Lenders Conference in Boston, Massachusetts August 16-18, 2023 may expose me to a risk of contracting the COVID-19 virus or other illnesses, and agree to comply with all requested safety measures including but not limited to wearing a face covering and other measures if applicable or required by the conference organizers or associated venue(s). Furthermore, I understand that the 2023 America East Small Business Lenders Conference and its third-party event management firm, EventfullyYourz cannot guarantee that I will not become infected with COVID-19 or other illnesses. I hereby acknowledge the contagious nature of COVID-19 and voluntarily assume the risk that I may be exposed to or infected by COVID-19 by attending the 2023 America East Small Business Lenders Conference and that such exposure or infection may result in personal injury, illness, permanent disability, and death. I understand that the risk of becoming exposed to or infected by COVID-19 at the 2023 America East Small Business Lenders Conference may result from the actions, omissions, or negligence of myself and others, including, but not limited to, the Encore Boston Harbor Resort staff, AMERICA EAST, INC. or AMERICA EAST committee members, EventfullyYourz staff, other 2023 America East Small Business Lenders Conference attendees, speakers or other groups or persons present in the associated conference venues unrelated to the America East Small Business Lenders Conference. I hereby release, covenant not to sue, discharge, and hold harmless the AMERICA EAST, INC. association, EventfullyYourz, the Encore Boston Harbor Resort and its employees, its agents, and its representatives, of and from any Claims, including all liabilities, claims, actions, damages, costs or expenses of any kind arising out of or relating to my voluntary attendance at the 2023 America East Small Business Lenders Conference. I understand and agree that this release includes any Claims based on the actions, omissions, or negligence of 2023 AMERICA EAST, INC., EventfullyYourz, Encore Boston Harbor Resort and its employees, its agents, and its representatives, whether a COVID-19 infection occurs before, during, or after participation in the 2023 America East Small Business Lenders Conference.

CANCELLATION & REFUND POLICY:

SPONSORS must send cancellation requests in writing via email to AmericaEast@eventfullyyourz.com. Cancellation requests received through May 1, 2023, will receive a 50% refund via the original payment method, at which time all sponsor benefits are then forfeited. Cancellation requests received on or after May 2, 2023, are not eligible for refunds. There are no discounted rates or partial refund considerations if the sponsor opts out of physical attendance or does not desire to utilize all included benefits. Sponsor attendees may be substituted through August 1, 2023, and must be submitted in writing to AmericaEast@eventfullyyourz.com.

ATTENDEES & GUESTS must send cancellation requests in writing via email to AmericaEast@eventfullyyourz.com. Cancellation requests received by July 1, 2023, will receive a full refund via the original payment method. Cancellation requests received on or after July 2, 2023, are not eligible for refunds, regardless of the cancellation reason. Attendee or Guest substitutions are permitted through August 1, 2023, and must be submitted in writing to AmericaEast@eventfullyyourz.com.