

# AMERICA WEST 2020



## BRINGING SBA LENDING TRAINING TO YOU

Inspiring and educating 7(a), 504, Community Advantage, and Secondary Market lenders in Pacific, Pacific Northwest and Rocky Mountains regions to become higher volume lenders.

## FOUR TRAINING SUMMITS

Denver, Colorado  
Salt Lake City, Utah  
Nevada (Location TBD)  
California (Location TBD)

[AmericaWestConference.com](http://AmericaWestConference.com)

# DENVER FEBRUARY 5-7



Join us in Denver as we kickoff our 2020 Roadshow in the Rocky Mountains region. Our mini training summit offers multiple learning opportunities for every role and level of SBA lending. Learn why SBA 7(a) and 504 lending are critical to your portfolio, how you can increase your lending volume, and hear about regionally relevant topics as well as updates to the newly released SOP, all facilitated by experts in the industry. See pages 4-6 for sponsorship and registration information.

## Training Host Partners



THE  
COMMONS  
ON CHAMPA  
Powered by the Downtown Denver Partnership



impact the lives of others

## AGENDA

### Wednesday, February 5<sup>th</sup>

2:00 pm – 4:30 pm Training Sessions\*  
5:30 pm – 7:00 pm Welcome Reception & Check-In

### Thursday, February 6<sup>th</sup>

9:00 am – 9:30 am Check-In/Continental Breakfast  
9:30 am – 10:30 am Welcome Session  
10:30 am – 11:45 am Workshop #1  
11:45 am – 12:45 pm Lunch & Learn Session  
1:00 pm – 2:30 pm Workshop #2  
2:30 pm – 2:45 pm Break  
2:45 pm – 3:45 pm Workshop #3  
3:45 pm – 4:30 pm Closing Session  
4:30 pm – 5:30 pm Networking Mixer

### Friday, February 7<sup>th</sup>

7:00 am – 7:00 pm Ski Day\*

\*Optional Event for an additional fee. Adjunct training details to be provided at a later date.



Help us make a difference in the lives of local Denver residents by donating to the [GIVE CENTER](#). America West will match your contributions, and we will be accepting donations of hygiene items at check-in.

## VENUE INFORMATION

**Wednesday's optional training** "Invigorate your Operation: People, Plan and Process" will take place at Colorado Lending Source at 1441 18<sup>th</sup> Street in downtown Denver, followed by our Welcome Reception (location TBD).

**Thursday's sessions** will take place at The Commons on Champa at 1245 Champa Street, in downtown Denver.

**Friday's optional SKI DAY** will include transportation to/from the Embassy Suites and [Breckenridge Ski Resort](#) with discounted lift tickets and various meetup opportunities throughout the day. Non-skiers welcome – Breckenridge is a gorgeous resort town with lots to do during the day! See *Registration Details later in this package for more info.*

## TRAVEL INFORMATION

The [Embassy Suites Downtown Convention Center](#) is our recommended hotel as it is closest to the Commons on Champa. Standard room rates are currently between \$162-\$179. Book your room early to secure availability at the best rate.

The closest airport is Denver International (DEN). The [Denver Airport Train](#) is the most cost-effective and quickest way to get downtown at only \$11 each way and runs every 15-30 minutes.

Several public parking garages are available surrounding the Commons on Champa.



# SALT LAKE

## MARCH 4-6



Our Salt Lake training will offer a unique set of training classes for every role and level of SBA lending with a focus on practical use-cases and tangible takeaways. Learn why SBA 7(a) and 504 lending are critical to your portfolio, how you can increase your lending volume, and hear about regionally relevant topics as well as updates to the newly released SOP, all facilitated by experts in the industry. See pages 4-6 for sponsorship and registration information.

### Training Host Partner

# ZIONS BANK



Help us advocate for and prevent crimes against children by donating to the [Elizabeth Smart Foundation](#). America West will match your contributions.



**ELIZABETH  
SMART  
FOUNDATION**



## AGENDA

### Wednesday, March 4<sup>th</sup>

2:00 pm – 4:30 pm Training Sessions\*  
5:30 pm – 7:00 pm Welcome Reception & Check-In

### Thursday, March 5<sup>th</sup>

8:30 am – 9:00 am Check-In/Continental Breakfast  
9:00 am – 10:00 am Welcome Session  
10:00 am – 11:30 am Workshop #1  
11:30 am – 12:45 pm Lunch Break  
12:45 pm – 2:15 pm Workshop #2  
2:15 pm – 2:30 pm Break  
2:30 pm – 3:30 pm Workshop #3  
3:30 pm – 4:30 pm Closing Session  
4:30 pm – 5:15 pm Networking Mixer

### Friday, March 6<sup>th</sup>

7:00 am – 7:00 pm Ski Day\*

\*Optional Event for an additional fee. Adjunct training details to be provided at a later date.

### VENUE INFORMATION

**Wednesday's optional training** "Everything you Need to Know about SBA Compliance and Staying within the White Lines – A Strategy for SBA Lending" (Marriott City Creek), followed by our Welcome Reception (location TBD).

**Thursday's sessions** will take place at Zions Bank Headquarters at One South Main Street, Salt Lake City (City Creek Center).

**Friday's optional SKI DAY** will include transportation to/from a [Park City Ski Resort](#) with discounted lift tickets and various meetup opportunities throughout the day. Non-skiers welcome – Park City is a gorgeous resort town with lots to do during the day! See *Registration Details* later in this package for more info.

### TRAVEL INFORMATION

There are three recommended hotels nearby the training center. Book directly and book soon for best possible rate and availability!

[Marriot City Creek](#) (2 blocks and inside walkway to building)  
[Kimpton Hotel Monaco](#) (short walk)  
[Hilton City Center](#) (short walk)

The closest airport is Salt Lake City International (SLC).

The City Creek mall has ample parking in their garage (inside walk to building).

# OTHER LOCATIONS

Stay tuned for further details regarding other locations for 2020. We are currently planning training in Nevada and California. Agendas will be similar to other locations.

This package and our website will be updated as planning progresses, so check back often!



## AMERICA WEST GIVES BACK

America West is committed to giving back to our community and has made a promise to donate a portion of proceeds each year to a local charity organization at each training location.

In 2018, we donated to the EOD Warrior Foundation, and in 2019, we donated to CAST-LA (Coalition to Abolish Slavery and Tracking).

In keeping with this important tradition, we are identifying local charities in each of our 2020 training areas and will announce those as they become available.

America West will match your donations to help improve the sustainability of our local communities.

DENVER: GIVE CENTER  
SALT LAKE: ELIZABETH SMART FOUNDATION



# SPONSORSHIP INFORMATION

Because we are putting a high emphasis on making this a training event rather than a typical “conference”, sponsorships will be limited to six per location. This will create a more intimate environment for networking, maintaining a focus on learning.

Our **Presenting Sponsor** of our entire roadshow is exclusive and limited to just ONE sponsor. This level has already sold out.

Our other sponsorships are either “**Two Locations**” or “**One Location**”. Our desire is to encourage as many local organizations to participate as possible, making the “One Location” option a good choice for those. Our “Two Locations” sponsorships offer an organization with a multi-state presence an opportunity to choose two different locations to sponsor and receive exposure and participation accordingly. Our Location sponsors have first opportunity to host the welcome reception the evening before the training begins.

Our **Host Partners** have donated the use of their facilities for our trainings. At this time, we are still planning locations for the remaining two cities – if you are interested in being a host partner in either Las Vegas or San Diego, please contact [AmeriWest@eventfullyyourz.com](mailto:AmeriWest@eventfullyyourz.com).

Register or Sponsor at:

[www.AmeriWestConference.com](http://www.AmeriWestConference.com)

# SPONSORSHIP OPPORTUNITIES



Each location will be limited to a total of SIX (6) sponsors – the presenting sponsor, and five additional sponsors on a first come, first served basis. Two of the five sponsor spots at each location will be reserved for local/regional sponsors.

	<b>Presenting (All Locations) \$5,000 <i>Limited to 1 sponsor</i></b>	<b>Two Locations \$2,500</b>	<b>One Location \$1,500</b>	<b>IN KIND Host Partner*</b>
Location Coverage	Sponsorship of entire roadshow – ALL LOCATIONS	Select TWO Locations	Select ONE Location	ONE Location
# Attendees Included	2 at each location	1 at each location	1	2
# Comp Tickets for Clients	4 at each location	2 at each location	2 tickets	2 tickets
Featured Sponsorship(s)	Networking Mixer each Location Offsite Activity each Location	Lunch Break	Continental Breakfast	Welcome Session
Exhibit Table	6' Table at each location	6' Table at each location	6' Table	N/A
Activity Tickets (i.e., lift tickets, etc.)	2 at each location	N/A	N/A	N/A
Verbal Recognition	Opening & Closing Sessions at each location	Opening & Closing Sessions at each location	Opening & Closing Sessions at each location	Opening & Closing Sessions
Featured Article, Ad or Video in Email	5 Features	2 Features	1 Feature	N/A
General Session Speaking Opportunity	5 Minutes at Each Location	N/A	N/A	5 Minutes during Welcome Session
Workshop Participation	1 Workshop at each location	1 Workshop at each location	N/A	N/A
Opportunity to Host Pre-Summit Training Class	YES	N/A	N/A	N/A
Opportunity to Host Pre-Summit Welcome Reception	N/A	YES	YES	N/A
Opportunity to Provide Branded Ad for Pre-Session Loops	YES	YES	YES	YES
Logo incorporated into roadshow logo	YES	N/A	N/A	N/A
Logo on Marketing Emails	YES	YES	YES	YES
Logo on Website	YES	YES	YES	YES
Advance Copy of Attendee List	2 Weeks Prior to each Location	2 Weeks Prior	2 Weeks Prior	2 Weeks Prior

\*If interested in being a host partner for one of our future locations, please contact us for more details at [AmericaWest@EventfullyYourz.com](mailto:AmericaWest@EventfullyYourz.com).



# REGISTRATION DETAILS



Attendee and sponsorship registration available online via our website at:

[www.AmericaWestConference.com](http://www.AmericaWestConference.com)

Attendee registration rates and deadlines for **LENDER ATTENDEES\*** are below. Don't delay – register today!

## Denver

Lender* Early Bird	\$249
Non-Lender Early Bird	\$349
Lender* Regular	\$349
Non-Lender Regular	\$449

## Salt Lake

Lender Early Bird	\$249
Non-Lender Early Bird	\$349
Lender Regular	\$349
Non-Lender Regular	\$449

## REGISTRATION CLOSES 2 WEEKS BEFORE EACH EVENT

*Training Summit ticket includes welcome reception the evening before, an entire day of training with breakfast and lunch, as well as an early evening mixer with hors d'oeuvres and drinks.*

*\*Lender attendees include 7(a) and 504 bank and non-bank lenders, CDCs, and Credit Unions.*

*Walkup registration may NOT be available. Cancellations with refunds accepted 30 days prior to each event; substitutions always accepted. Sponsorship fees are non-refundable and must be paid 30 days prior to each event to retain all benefits.*

## OTHER TICKET OPTIONS

- **Pre-Conference Training:** An optional 2.5-hour class offered prior to the main training day at a significant cost-savings to you at just \$49 when you also attend the main training summit. Classes will vary by location – visit our website or location pages earlier in this document for more details on each location's planned offering.
- **Offsite Activity:** Optional activity on the Friday following our trainings, with plenty of networking and fun, includes transportation, activity tickets and location-specific networking opportunities.

**DENVER:** Breckenridge trip includes bus transportation from the Embassy Suites downtown to the resort and food/drink meet-up opportunities. Group discounted lift ticket and ski rental may also be added to your package. Visit our [website](#) for more details!

**SALT LAKE CITY:** Park City trip includes bus transportation from the Marriott City Creek to the resort and food/drink meet-up opportunities. Group discounted lift ticket and ski rental may also be added to your package. Visit our [website](#) for more details!



## CONFERENCE QUESTIONS

For questions related to sponsorship or the conference in general, please contact us by email at [AmericaWest@eventfullyyourz.com](mailto:AmericaWest@eventfullyyourz.com) or by phone at **844.887.6477** and our event team will be happy to help.

## STAY CONNECTED

Keep up with event updates as they happen and share with your colleagues:



## AMERICA WEST STEERING COMMITTEES

### DENVER:

Amanda Peterson, *Colorado Lending Source*  
Chuck Evans, *Capital Growth Solutions*  
Jackie Gonzalez, *ABC Bank*  
Jennifer Fagan, *Nationwide Valuations*  
Marty Ferguson, *First Business*

Carrie Singer, *City of Denver*  
David Brooks, *Cirrus Secure*  
Jennifer Blumig, *EventfullyYourz*  
Kyle Gustafson, *PCFS Solutions*

### SALT LAKE CITY:

Blake Zumbrunnen, *Zions Bank*  
Jennifer Blumig, *EventfullyYourz*  
Ryan Hutchins, *Peak Business Valuation*

Chuck Evans, *Capital Growth Solutions*  
Kimberly Holley, *Mountain West Small Business Finance*

### AMERICA WEST 2021 SUMMIT:

Chuck Evans, *Capital Growth Solutions*  
Melissa Hopton, *CORPSMART*  
Nick Jellum, *Anastasi Jellum, P.A.*  
Kimberly A. Rayer, *Starfield & Smith, P.C.*  
Ken Rosenthal, *CDC Capital Markets*  
Paul Santomauro, *FRANdata*  
Kyle Gustafson, *PCFS Solutions*

Karen Bean, *Signature Bank*  
Joseph Bonin, *Partner Engineering and Science, Inc.*  
Lisa Preston, *The Preston Group, LLC*  
McKenna Weiks, *CORPSMART*  
Tom Hofstetter, *Schenck, Price, Smith & King, LLP*  
Brian Carpenter, *MassMutual*  
Jennifer Blumig, *EventfullyYourz*