



March
15-17

Training 7(a), 504, Community Advantage, and Secondary Market lenders in the Pacific, Rocky Mountain and Pacific Northwest Regions to become higher volume lenders.

MARCH 15-17

Loews Coronado Bay Resort & Spa
San Diego, California

AmericaWestConference.com

ABOUT THE CONFERENCE

After successful conferences in California in 2018 and 2019 and smaller roadshow formats in Denver and Salt Lake City in early 2020, America West returns to **California** this year in its traditional conference format... better than ever!

This is the **ONLY** regional conference of its kind in the West. Don't miss this opportunity to learn and network **In-Person**.

Join us for **2.5 days** as we bring you unique and interactive educational workshops with practical takeaways (not your typical breakouts – get ready for something DIFFERENT), general sessions that include timely **updates directly from SBA Headquarters on the New SOP**, and amazing networking events!

Our Welcome Reception on the Bay Terrace will offer scrumptious bites and beverages under twinkling lights with **waterfront views**, while our March Madness lunch in our exhibit hall will provide chances to get up and get moving, play games and win prizes. Finally, our Thursday evening event will take you on a short bus ride over to downtown San Diego to Punch Bowl Social for more games, food, and fun!

Our commitment to **low-cost registration** provides an **opportunity to train your Entire Team!** Bring your underwriters, closers, BDOs, department managers, etc., Workshops will be geared toward every role and level of SBA lending from those newer to the industry to seasoned 20+ year veterans.

TRAVEL

The closest airport is San Diego International Airport (SAN), located within just 16 minutes from the **Loews Coronado Bay Resort & Spa**. Rental cars, Uber and Lyft are all available. The gated resort includes a private marina, water-sport activities, yoga classes, three heated pools with cabana rentals, a beachfront and Sea Spa, as well as three onsite dining options. Complimentary shuttle service is provided to Silver Strand Beach or downtown Coronado Village.

Our group rate is offered at a \$100+ discount off published rates and the nightly \$36 resort charge has been **WAIVED** for our group, so reserve your room before our block sells out! **Reserve at www.AmericaWestConference.com**.

Discounted Group Rate of \$269 until Sold Out!

CONFERENCE AGENDA

Wednesday, March 15th

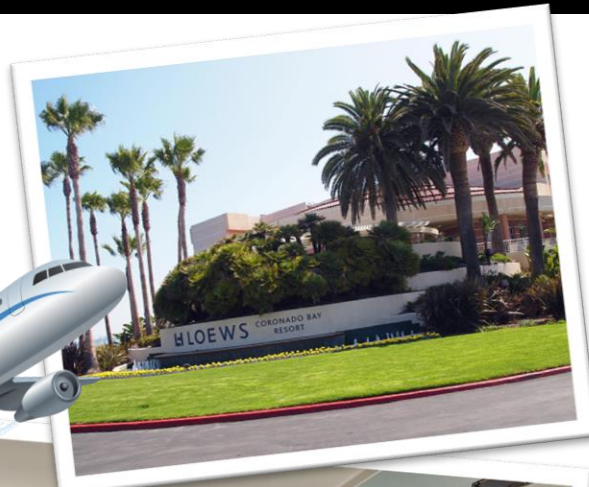
1:00 pm – 7:00 pm	Conference Check-In Available
12:30 pm – 4:00 pm	SBA Lending A to Z for New Lenders
2:00 pm – 3:30 pm	Sponsor/Exhibitor Workshop
4:00 pm – 6:00 pm	Exhibitor Setup
5:30 pm – 7:30 pm	Welcome Reception

Thursday, March 16th

7:30 am – 8:30 am	Breakfast
8:30 am – 10:15 am	Opening Session: The New SOP
10:15 am – 10:45 am	Break
10:45 am – 12:00 pm	Educational Workshops
12:00 pm – 1:15 pm	March Madness Lunch
1:30 pm – 2:45 pm	Educational Workshops
2:45 pm – 3:15 pm	Break
3:15 pm – 4:30 pm	Educational Workshops
5:00 pm – 5:30 pm	Buses Depart for “BBB” Event
5:30 pm – 8:30 pm	Bowling, Baskets & Brews (“BBB”) Event
8:30 pm – 9:00 pm	Buses Return to the Loews

Friday, March 17th

8:15 am – 10:00 am	Luck o’ the Irish Awards Breakfast & Closing Session
10:00 am – 11:45 am	Exhibitor Breakdown
10:15 am – 11:30 am	Educational Workshops
11:30 am – 12:00 pm	Conference Adjourned/Hotel Checkout
11:30 am – 12:30 pm	Optional: StandUp for Kids Pack Assembly



TRAINING OPPORTUNITIES



Our conference offers a well-rounded itinerary with topics that cover the entire lending lifecycle for all types of SBA lenders. Our sessions are engaging and interactive, and provide practical takeaways that can be implemented easily and quickly. Focusing on relevant topics, our goal is to provide not only knowledge but actionable understanding. Whether you are a growing SBA lending department or a well-seasoned team of two, our tracks will be applicable to you, from SBA department managers and Bank CEOs to underwriters, closers, servicers and BDOs.

Educational Workshop Topics:

Below is a list of topics that may be included in our educational workshops, subject to speaker availability and change until finalized.

- 7(a) Lending Policy Updates & Hot Topics
- 504 Lending Policy Updates & Hot Topics
- Credit Underwriting
- Loan Servicing Best Practices
- Preparing for PARRIS Reviews & Audits
- Secondary Market – Marketing your SBA Program
- International Trade Program
- Portfolio Management
- Environmental Due Diligence
- Microlending Oversight & Best Practices
- Disaster Recovery
- Liquidation & Litigation Responsibilities
- SBA Express
- SBA Eligibility
- Creating and Managing a Thriving SBA Lending Team
- Managing the 504 Approval Process: Avoiding Common Pitfalls to First Pass Approvals
- Navigating Common 7(a) Loan Issues: Avoiding Ineligible Loans & Delayed Closings
- Construction Funding
- Business Acquisitions & Change of Ownership

Opening & Closing Sessions

Each year, our opening and closing sessions deliver timely and relevant SBA Headquarters updates, and this year will be no exception! On the heels of the new SOP being released, our opening session will cover all the details you need to know, followed by deep dive interactive workshops to address all your questions and practical use case scenarios. Friday's closing session & breakfast will honour some of our local small businesses and the lenders who contributed to their success, as well as top performers and new growth from each region. If you missed the 2022 national conferences, this is your opportunity to meet and talk with invited SBA Headquarters team members from the Office of Capital Access, as well as our national trade associations, NAGGL and NADCO!

Registration Add-On: Training Class

SBA Lending A to Z for Newer Lenders

An optional training class will be offered prior to the conference on Wednesday from 12:30pm-4:00pm. This class will be focused on newer SBA lenders wanting to gain more foundational knowledge of the overall SBA lending process prior to attending conference workshops. Additional details, class title, full description and speakers forthcoming. **Cost is just \$49 with full conference registration and class size is limited to 25.**

WHAT PAST ATTENDEES HAD TO SAY

"Very well run, high energy conference."

"I think it was great and the content was fabulous! I learned a lot and was able to network."

"The 1.5 hour sessions were nice and allowed for a less rushed format, which I appreciated."

"This is something we should support...I like the educational opportunity it provides to our staff."

"I really enjoyed and appreciated the real life case scenarios and best practice tips."

"The Case Study format was perfect...very knowledgeable facilitators."

CONFERENCE NETWORKING HIGHLIGHTS



Welcome Reception

WEDNESDAY, 3.15 5:30-7:30 pm

Join us on the expansive Bay Terrace for heavy hors d'oeuvres and cocktails to celebrate our conference kick-off and network with colleagues while enjoying live music. Gorgeous waterfront views and twinkle lights included! Event included for all conference attendees and pre-registered non-industry guests.

March Madness Lunch

THURSDAY, 3.16 12:00-1:15 pm

Join us for Day 1 of March Madness, as we watch Round 1 games from screens placed throughout the exhibit hall, enjoy a tasty lunch and the opportunity to win prizes by shooting baskets and playing various games throughout the exhibit hall. Included for conference attendees only.

AMERICA WEST GIVES BACK

For each basket scored during lunch, America West will donate \$.50 to StandUp for Kids – San Diego.



Bowling, Baskets & Brews

THURSDAY, 3.16 5:30-8:30 pm

Let loose and have fun at our **Bowling, Baskets and Brews** event! We'll bus everyone over to **Punch Bowl Social** in downtown San Diego where we'll enjoy a private karaoke room, bowling lanes, foosball, arcade games and more amidst a host of televisions tuned into the evening's final March Madness round one games. Atmosphere is fun and casual so come as you are. Dinner and drink tickets provided with cash bar also available. Buses depart the hotel between 5:00-5:15 pm and return starting at 7:30 until 9:00 pm. Event included for all conference attendees and pre-registered non-industry guests.



AMERICA WEST GIVES BACK

America West has a long-standing tradition of giving back to the local communities we serve. Past recipients have included the EOD Warrior Foundation, CAST (Coalition for the Abolition of Slavery & Trafficking), The Denver GIVE Center, and The Elizabeth Smart Foundation. **We are proud to say that since 2018, America West and our attendees have donated over \$12,000 to these important causes!**

This year's chosen charity organization is **StandUp for Kids – San Diego**.

Teen homelessness rates are on the rise. Homeless kids are the most likely target of human traffickers, pornographers and gangs. These vulnerable kids are forced to endure unimaginable horrors, just to survive. In 2019, StandUp for Kids – San Diego served over 320 duplicated youth with volunteers donating over 9,000 hours of service. StandUp for Kids San Diego's main focus is on prevention; providing an array of resources and services to help homeless youth on their journey to self-sufficient adulthood. StandUp for Kids - San Diego opened its doors in 1990 as the first StandUp for Kids chapter and now operates four core programs across 17 locations in 11 different states: Outreach Drop-In Center, Street Outreach, Mentoring and Housing Support.



Ways YOU Can Help

1. **Bring any of the items listed below to our donation bin** located in the conference foyer at any time throughout the conference OR
2. **Participate in our March Madness Lunch** by shooting baskets to earn a \$.50 donation for each basket scored OR
3. **Make a monetary donation** to the campaign at any time [HERE](#) (be sure to indicate "America West" in the Comments field) and America West will MATCH your donations up to \$2,000 OR
4. **Volunteer to assemble donation packs** from donated supplies – meet us in the conference foyer from 11:30 – 12:30 pm on Friday!

Requested Donation Items:

- Small shampoo/conditioner (2 in 1)
- Handy-wipes
- Small Travel Deodorant
- Comb/brush
- Toothpaste/Toothbrush (travel size)
- Disposable Razor
- Small bottles of water
- Small tubes of lip balm
- Small tubes of sunscreen
- Sewing kits
- Napkins
- Plastic ware
- Juice boxes
- Granola/energy bars
- Pop top pudding/fruit cups
- Small boxes of raisins
- Small pop-top Chef Boyardee type meals
- Small bags of chips
- Assorted sized Band-Aids
- Individually wrapped alcohol prep pads
- Individually wrapped gauze pads
- Small first aid cream tubes
- Tents
- Sleeping Bags
- Blankets
- Winter hats/beanies
- Hoodies

Don't miss our announcement of our donation total during Friday's "Luck o' the Irish" Breakfast & Closing Session

HOW TO REGISTER

www.AmericaWestConference.com



LENDER REGISTRATION

Early Bird Lender/Sponsor \$499

Through December 15th

Regular Rate Lender/Sponsor \$599

Through February 15th

Late Rate Lender/Sponsor \$699

February 16th until Sold Out

REGISTRATION CLOSES
MARCH 5*

**Or Once we SELL OUT*

Attendance is IN-PERSON only. Virtual attendance is not offered for this year's conference.

Walkup registration will NOT be available. Substitutions always accepted. See full refund/cancellation policy at the end of this document and on our website.

Other Ticket Types:

Non-Lender/Non-Sponsor \$850

For non-sponsoring non-lending organizations. This includes all industry service providers that do not expressly loan funds to small businesses. Examples may include training and recruiting organizations, LSPs, environmental firms, business valuation firms, FinTech, Insurance providers, etc. Rate of \$850 applies at all times regardless of registration date.

Government Attendee \$299

Applies for only those that are employed by a government agency such as U.S. Small Business Administration.

Guest Ticket \$175

This ticket is for NON-INDUSTRY professionals only, such as spouses, family members, etc. Lenders and service providers must purchase a full conference ticket. Guest ticket includes both evening events (Wednesday Welcome Reception and Thursday Bowling, Baskets and Brews event at Punch Bowl Social). Guests must check in at conference registration desk to collect their badge prior to attending either evening event.

Additional Sponsor or Exhibitor Attendee Same as Above Lender/Sponsor Rates

To add more attendees from your already registered sponsoring organization, select the "Lender/Sponsor" ticket type. Pricing follows the rates above, based on date of registration.

www.AmericaWestConference.com

SPONSORSHIP OPPORTUNITIES



We want YOU to join us as one of our premier Sponsors. We are limiting exhibit tables to 40 and expect to sell out, so be sure to register early. Exhibitor Only level opens January 15th ONLY if booths have not yet sold out from higher levels. Register early for maximum brand exposure before, during and after the conference! *Details for all items are listed on the following pages.*

Sponsor at: www.AmericaWestConference.com

	Diamond	Platinum	Gold	Silver	Exhibitor Only*
	\$8,500	\$4,500	\$3,000	\$2,000	\$1,450
Exclusivity	Limited to 2 Sponsors in Non-Competing Categories	Unlimited	Unlimited	Unlimited	Space Limited – opens 1/15/23 based on availability*
Exhibit Space/Table*	Oversized Space Included	Included	+\$500	+\$500	Included
Exhibit Space Location	Choice of Location	Choice	Choice	Assigned	Assigned
Sponsor/Exhibitor Workshop	Included	Included	Included	Included	Included
Tech Add-On Option (limited to 4)**	Included - \$0 Added Cost	+\$500	+\$750	+\$750	N/A
Included Attendees	4	3	2	1	1
Speaking Opportunity	5 Mins at Opening or Closing Workshop Moderator	Workshop Moderator	N/A	N/A	N/A
Featured Sponsorship(s)	Welcome Reception Thursday Lunch Thursday “BBB” Event	Thursday Lunch Friday Breakfast	Breaks	Thursday Breakfast	N/A
Use of Presidential Suite	Yes Wednesday or Thursday	N/A	N/A	N/A	N/A
Logo on Conference Materials	Badges/Lanyards Attendee Bags Power Point Footer Conference Banners Mini Agenda	Conference Banners Mini Agenda	Conference Banners Mini Agenda	Conference Banners	N/A
Conference Email Promotion	Logo w/Link to your website (1) Featured Article, Ad or Video	Logo w/Link (1) Featured Article, Ad or Video	Logo w/Link	Logo w/Link	Name with Link
Conference Website Promotion	Logo w/Link to your website	Logo w/Link	Logo w/Link	Logo w/Link	Name with Link
Mobile App	Sponsor Listing Event Game	Sponsor Listing Event Game	Sponsor Listing Event Game	Sponsor Listing Event Game	Event Game
Rotating Digital Ad at Registration Desk	Yes	Yes	Yes	N/A	N/A
Verbal Recognition	Opening Session Thursday Lunch Thursday “BBB” Event Closing Session	Opening Session Thursday Lunch Closing Session	Opening Session Closing Session	N/A	N/A
Attendee List Availability	3 Weeks Prior 1 Week Prior 1 Business Day After	3 Weeks Prior 1 Week Prior 1 Bus. Day After	1 Week Prior 1 Bus. Day After	1 Week Prior 1 Bus. Day After	1 Bus. Day After

* Exhibitor Only level will ONLY be available as of 1/15/2023 if booths are not yet sold out as of January 14th, 2023.

** Tech Add-On is limited to the FIRST four sponsors to select it. Though included at no extra cost for Diamond, it must be selected prior to selling out.

Sponsorship Details



Exclusivity indicates whether there are limited sponsorships available in a particular level. All levels other than the Diamond level are unrestricted. The Diamond level is limited to just TWO sponsors in non-competing categories. The Exhibitor-only level will open as of January 15th, ONLY if we have not yet sold out of the 40 available booths. If all booths have sold prior to January 15th, the Exhibitor Level will not be made available.

Exhibit Space/Table and Location indicates whether an exhibit space/table is included for each sponsor level. An additional fee of \$500 applies to add an exhibit booth for Gold and Silver levels. Each exhibitor space is approximately 8'x8' and includes a table with skirting, and 2 chairs. An oversized 10'x10' booth area is provided to Diamond level sponsors with prominent placement. Booth locations are chosen in order of sponsor level and then date of registration; thus the Diamond sponsor that registers first, receives first choice, followed by the second Diamond to register, followed by the first Platinum to register and so on. Locations are chosen once all booth spaces have been sold out. Locations are assigned to Silver and Exhibitor only levels.

A Sponsor/Exhibitor Workshop will be offered on Wednesday afternoon FREE OF CHARGE to all sponsors and exhibitors. These workshops will focus on Ways to Maximize your Sponsorship Benefits, along with Marketing & Networking Best Practices for Increasing ROI. Additional details and speaker information will be made available closer to the conference. Plan your travel accordingly so you don't miss this important session JUST for our sponsors and exhibitors!

Tech Add-On Option is included with Diamond sponsorships and available to Platinum, Gold and Silver sponsors for an additional fee. The tech add-on includes the opportunity to setup a tech demo station in the foyer (privacy drape included) throughout the entire conference from 4:00 pm Wednesday through 12:00 pm Friday, just outside the ballroom in the main traffic area, where you can provide product demos to attendees. It includes promotion within a pre-conference email blast about the Tech Demos, inclusion within an attendee handout about the tech demos, and demo signage with your logo. Limited to the first 4 tech companies to register (though included with Diamond at no added cost, it must be selected prior to selling out of all four spots). Tech-Add on is unavailable to Exhibitor-only sponsors.

Included Attendees are listed for each sponsor level – Diamond includes 4, Platinum 3, Gold 2, Silver and Exhibitor 1. All persons attending any portion of the conference including exhibitors must be pre-registered and paid. Additional attendees may be added at the current Lender/Sponsor rate as applicable.

Speaking Opportunities are provided to both Diamond level sponsors. During registration, choose either Opening Session or Closing Session to receive a 5-minute timeframe to provide remarks to our full conference audience. Choice of session is first come, first served to the first Diamond sponsor to register.

Featured Sponsorships

- **Welcome Reception** – includes entrance signage with logos and named specialty cocktails with bar signage
- **Thursday Breakfast** – Includes entrance signage with logos
- **Thursday “March Madness” Lunch** – includes entrance signage with logos, opportunity to “host” a basketball shootout game (game provided) at your exhibit booth, and make prize announcements to the full group during the lunch
- **Thursday “Bowling, Baskets and Brews” (BBB) Event** – includes entrance signage with logos, bus signage with logos, sponsored bowling lanes, signage in karaoke room, and on bar tops with opportunity to make a brief announcement during the event.
- **Friday “Luck o’ the Irish” Breakfast & Closing Session** – includes entrance signage with logos and opportunity to announce prize winners on stage.

Use of Presidential Suite is offered complimentary to both Diamond level sponsors for one day/night each. Each sponsor, upon registering, will choose to either use the suite on Wednesday or Thursday from 4:00 pm through 11:00 am the following day. The suite is 1750 square feet and is ideal for entertaining with a marble entranceway, an outdoor patio with 3 furnished balconies with panoramic views of the Bay and San Diego skyline, spacious living room and dining room with fireplace, full size refrigerator, wet bar, and Peloton bike. Includes separate King bedroom and full bath that can be locked during hosted events. Living area includes separate half bath.



Logo Inclusion includes your logo on each item listed. Tote bags will be supplied for attendees to use to collect items from exhibitors and will not be pre-assembled with promotional items. Conference banners are vertical retractable banners displayed in the registration and foyer areas. Stage banner/background will include Diamond sponsor logos only.

Email & Website Promotion includes your logo linked to your website listed at the bottom of each conference email as well as on the “Sponsors” tab of the conference website. Exhibitor-only level includes name and link only (not logo). Diamond and Platinum sponsors receive (1) feature within one conference email of their choice to include a short article, advertisement image or 30-second video (must be shot horizontal orientation). Content must be provided no later than 6 weeks prior to conference start date to guaranty inclusion.

Mobile App includes a sponsor profile listing within the “Sponsors” feature to include content of your choice (i.e., logo, contact information, website, company description/services provided, links to attachments, websites, etc.) and listing in Event Game (if your company has an exhibit table). Exhibitor only level will only be listed in Event Game feature.

Rotating Digital Ad includes a slide or ad of your choice which loops continuously with other Diamond, Platinum and Gold sponsor logos at the conference registration desk from Wednesday through Friday during conference hours.

Verbal Recognition includes the reading of your logo within the context of a sponsor recognition slide for your particular sponsor level during the Opening and Closing sessions in front of the full conference audience for Diamond, Platinum and Gold sponsors. Diamond and Platinum will also be recognized during Thursday’s lunch, and Diamond will be recognized during Thursday evening’s “BBB” event.

Attendee List Availability includes an emailed list of all attendee contact information with job titles and years in SBA lending. Diamond and Platinum sponsors are provided the list 3 weeks prior, while all sponsors other than Exhibitor-only are provided the list one week prior, with a final listing provided the Monday following the conference to all sponsors including Exhibitor only level. A listing of attendees is available via the conference mobile app for download throughout the conference as well.

To register your sponsorship, go to www.AmericaWestConference.com

Sponsorships close February 15th, 2023, or Once SOLD OUT!

Diamond sponsors are limited to the first two non-competing industry sponsors to register. Non-exclusive sponsorship levels are unlimited. Exhibit hall is limited to 40 booths. Subsequent to booth space selling out, any sponsorships purchased after that time will not receive a refund or credit for unavailable booths. Please see our terms and conditions including cancellation and refund policy located on our website.

Conference Questions

For all questions, please contact us by email at AmericaWest@eventfullyyourz.com or by phone at 844.887.6477 and our EventfullyYourz event team will be happy to help.



America West 2023 Terms & Conditions:

Please review the policies below prior to registering.

IN-PERSON ATTENDANCE ONLY: The 2023 America West Small Business Lending 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 EventfullyYourz. Note that credit card statements may reflect "EventfullyYourz Event Management" or similar description as the merchant name. America West reserves the right to cancel any registration or sponsorship that is not paid timely according to payment due dates, retaining any funds already received. For conference or payment related questions, please contact AmericaWest@eventfullyyourz.com or call 844-887-6477.

COVID-19 RELEASE WAIVER: I understand that my in-person attendance at the 2023 America West Small Business Lending Conference in Coronado, California March 15-17, 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 West Small Business Lending Conference and its 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 West Small Business Lending 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 West Small Business Lending Conference may result from the actions, omissions, or negligence of myself and others, including, but not limited to, the Loews Coronado Bay Resort & Spa staff, Punch Bowl Social staff, America West committee members, EventfullyYourz staff, or other 2023 America West Small Business Lending Conference attendees, speakers or other groups or persons present in the associated conference venues unrelated to the America West Small Business Lending Conference. I hereby release, covenant not to sue, discharge, and hold harmless the EventfullyYourz, the Loews Coronado Bay Resort & Spa 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 West Small Business Lending Conference. I understand and agree that this release includes any Claims based on the actions, omissions, or negligence of EventfullyYourz, the Loews Coronado Bay Resort & Spa and its employees, its agents, and its representatives, whether a COVID-19 infection occurs before, during, or after participation in the 2023 America West Small Business Lending Conference.

CANCELLATION & REFUND POLICY:

SPONSORS must pay in full within 30 days of registration date, or by February 15th, 2023, whichever is sooner, to avoid loss of sponsorship benefits. Sponsors may request to cancel in writing via email to AmericaWest@eventfullyyourz.com up until January 15th, 2023 to receive a 50% refund via the original payment method, at which time all sponsor benefits are then forfeited. If request to cancel is received on or after January 16th, 2023, no refunds can be given, and sponsor may choose to retain all benefits if desired. Partial refunds cannot be applied if physical attendance or use of any included benefits are not desired. Included sponsor attendees may be substituted up until March 5, 2023.

ATTENDEES/GUESTS may request cancellation of attendee, guest, or pre-conference training tickets via email to AmericaWest@eventfullyyourz.com by February 1, 2023 for a full refund via the original payment method. Cancellation requests for any reason on or after February 1, 2023 will not receive a refund of any amount. Substitutions permitted through March 10th, 2023.