

**Bellingham**  
ANGEL GROUP

*Presents*



## **“Extending the Runway”**

*Leadership and Investment Strategies for the Current Economy*

**A New Advanced Workshop by Dave Berkus and Friends**

**Friday, March 27, 2009  
8 a.m. to 5 p.m.**

**Fox Hall at the Hampton Airport Inn, Bellingham, WA**

Online registration details at [www.bellinghamangels.com](http://www.bellinghamangels.com) or complete and mail in registration form on page 4 with payment

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### **Program Sponsors:**



## Who Should Attend?

This **New Advanced Full Day Workshop** is designed especially for **all** Angel Investors, high net-worth Individuals with senior business experience with an interest in investing, Entrepreneurs, Service Providers and Advisors who work with Entrepreneurs, or Economic Developers with some prior experience in private equity investing.

## What is the Content of This Workshop?

The purpose of this workshop is to address the following questions (and more) about portfolio strategy in the current economic downturn. Consideration will be given to investments already made and how to help build effective boards to protect your investment as well as subsequent exit strategies. In addition, advice on how to proceed with new investments in 2009, including **ten trends in technology for these tough times**:

- In what roles and responsibilities do angels and entrepreneurs serve during the course of the post-investment process including Board of Directors positions, observers of company operations, and advisors to company managers?
- What strategies exist for angel investors in offering mentoring, value-added services, and transitioning to leadership?
- Which are the best approaches for seeking and accepting follow-on funding and managing the relationships that arise from co-investments?
- What methods should be explored for selecting deal exit options, preparing to exit, and executing strategies?
- What are the resources and points of leverage that board members and angel investors can add to their portfolio companies?
- What are the legal, moral and practical limits upon board and angel involvement in operations?
- Stories of early stage portfolio company CEO's gone good and CEO's gone bad
- Workshop revolving upon issues of communication and alignment between CEO's and their boards

## Who is the Faculty for This Workshop?

This workshop will be led by **Dave Berkus, Tech Coast Angels** and will include members of the **Bellingham Angel Group, other Regional Angel Experts** and **Senior Executives** with diverse investment experience, legal and venture capital expertise.



**Dave Berkus** speaks with vast experience and deep insight about his involvement with small to medium company board and management issues, sharing great, epic stories about both good and bad entrepreneurial managers and their boards. His insight into the technology trends that shape corporate growth are in demand for informing and aiding groups of all kinds and sizes in their planning for the future. Dubbed the 'Uber Angel' by Frank Peters of the Frank Peters Show, Dave is an early stage venture capitalist with a hands-on background in technology. An entrepreneur for over fifty years, he formed and managed successful businesses in the entertainment and software arenas, and is a respected technology industry leader and spokesperson. Chairman of five early stage boards and member of four more, Dave's IRR is an enviable 97%. Honored as "Director of the Year" by the Forum

for Corporate Directors, Dave is a much-in-demand keynote speaker throughout the world, addressing technology trends for corporate planning. Here's what workshop attendees have to say about Dave:

"I thought the presentation was outstanding - a unique opportunity to acquire practical skills. Dave is a model to follow. He has done a masterful job of distilling decades of experience and knowledge into something we can immediately apply to our own pursuits." - *Doug Moskowitz - Mid-America Angels (Berkus Mid-America Angels Workshop, 2008)*

"Our portfolio company CEO's and their Directors effusively praised the takeaway value of your 'Building Effective Boards' workshop...a truly high impact event!" - *John Huston, Manager, Ohio TechAngels (Berkus Ohio Board workshop, 2008)*

Dave's new book "**Extending the Runway**" will be available and for sale at a specially discounted workshop price at the event and which you can order in advance



**Dr. Basil Peters** is Fund Manager for the angel fund: [Fundamental Technologies II](#). He also founded a venture capital firm and a hedge fund and has been a CEO in Vancouver and Silicon Valley. Basil is an active, early-stage, technology investor and writes a blog on best practices for entrepreneurs and angel investors at <http://www.AngelBlog.net>. He has a Ph.D. from the University of British Columbia in Electrical and Computer Engineering and has received the Entrepreneur of the Year Award, Canada Awards Silver Medal in Entrepreneurship, BC Science and Engineering Gold Medal and Business Leader of the Year Award. Basil is an [Entrepreneur in Residence](#) at Simon Fraser University where he helps students and faculty spin-off university research into promising technology companies. He is also on the Executive Board of the [Bellingham Angel Group](#).

Basil's new book "[Early Exits - Exit Strategies for Entrepreneurs and Angel Investors \(But Maybe Not Venture Capitalists\)](#)" will also be available and for sale at a specially discounted workshop price at the event.

### **Directions, Hotel Accomodation and Reservations**

**Fox Hall** is part of the **Hampton Inn Bellingham** complex located at 3985 Bennett Drive, Bellingham, Washington, USA 98225 (**Next to Bellingham Airport**)

**Special Overnight Hotel Group Rates for Workshop Attendees:** \$89.00 plus taxes

(Quote Group Code **BMA**)

Hotel Reservations: Tel: +1-360-676-7700 Fax: +1-360-671-7557

**Directions & Transportation** From I-5 N/S: Exit 258 Bakerview Road. From I-99 (Canadian Interstate-becomes I-5 as it crosses US): Go 25 mi south from I-5 25 miles south of Canadian Border (where I-99 meets I-5); I-90 90 miles north on I-5 Exit 258 (I-5) visible from Highway Bakerview Road Airport Exit. South: Turn right at exit to 2nd stop light, right on Bennett, hotel on left. North: Turn left at exit to 2nd stop light, right. Hotel bus from Bellingham International Airport is just three minutes to the hotel.