



SERGE 2022

BY INVITATION ONLY

Wednesday October 19, 2022

2:30 pm – 4:30 pm:	Registration Table Open	Hotel Lobby, The Ritz-Carlton
6:30 pm – 9:30 pm:	Welcome Reception and Buffet Dinner	Mercier Terrace, The Ritz-Carlton

Thursday October 20, 2022

7:15 am – 8:15 am:	Breakfast	Crescent View (12 th Floor), The Ritz-Carlton
8:30 am – 4:30 pm:	Learning Program	Mercier Terrace & Courtyard, The Ritz-Carlton
8:30 am – 9:45 am:	Welcome, SERGE program info & Retreat goals; Introductions (<u>Entrepreneurs + Spouses/Partners</u>)	
9:45 am – 10:00 am:	BREAK	
10:00 am – 12:00 pm:	Opening keynote session: Effective Use of Coaching Mickey Levitan Veteran coach and HR chief Micky Levitan will lead a two-part session on 1) the use of coaches for both ourselves and our team members and 2) better defining and executing on our #1 priority.	
12:00 pm – 1:00 pm	Lunch	Mercier Terrace & Courtyard, The Ritz Carlton
1:00 pm – 1:45 pm:	Session 1 – Bodymind Kate Mihevc Edwards Besides diet, exercise, and sleep, how can we maximize health as we age? How does the body-mind relationship affect our health and how can we use it to prevent disability and reduce pain? What we can do and how we can consistently motivate ourselves to do it?	
1:45 pm – 2:30 pm:	Session 2 – New models for supporting entrepreneurs Gwen Edwards The traditional VC model focuses on creating unicorns at the expense of good organizations that might never reach \$1B. Many of us would support companies with modest growth if risk were reduced and good exits more likely. How can we use our experience, money, and passion to generate solid returns while incenting entrepreneurship?	
2:30 pm – 2:40 pm:	Break	

Thursday October 20, 2022 (Continued)

2:40 pm – 3:40 pm:	Session 3 – Alternative investments	Ken Parlin
	Successful entrepreneurs often have the means to take on extra risk and meet thresholds for alternative investments. What should we know about investing in real estate, VC or PE funds, renewable energy, crypto, or creative approaches to increasing wealth? Wealth advisor Ken Parlin won't recommend specific vehicles but will lead a discussion on how you can benefit from new opportunities without going off the rails.	
3:45 pm – 4:30 pm:	Breakouts 1 and 2	
	Private Equity Practices	Martin Babinec
	What do PE firms most often change in companies they invest in and what can we learn from that? What makes companies attractive to potential investors? What should entrepreneurs look for in a PE investor-partner?	
	Better estate planning	Ken Greathouse
	Estate planning is complex legally and financially. Entrepreneurs should think through the key issues as early as possible since many decisions are irrevocable and have greater benefit when made earlier. What are the most important issues to keep in mind? What are the pitfalls and what new strategies are we using?	
6:20 pm	Meet in hotel lobby to depart for Arnaud's as a group [813 Bienville Street] 5 minute walk	
6:30 pm – 9:30 pm:	Cocktail Hour followed by seated dinner in small groups	Arnaud's

Friday – October 21, 2022

7:00 am – 8:00 am:	Breakfast	Crescent View (12 th Floor), The Ritz-Carlton
8:00 am – 11:30 am:	Learning Program	Mercier Terrace, The Ritz-Carlton
8:00 am – 8:45 am:	Session 4 - Supporting women and POC entrepreneurs	Elisa Miller-Out
	Entrepreneurs and funders are disproportionately white and male, with relatively few coming from disadvantaged backgrounds. Entrepreneurship has the potential to lift up women, people of color, and the economically depressed, but how can we make it more inclusive? What are the benefits of doing so? How can we identify, attract, develop, and manage women and people of color in our organizations and on our boards?	



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Friday – October 21, 2022 (Continued)

8:45 am – 9:45 am:

Breakouts 3 and 4

Prepping for Life Choices Post Exit

Mark Zitter

All entrepreneurs eventually exit their companies – and those who are already active in social causes/impact often leverage their financial freedom to make choices beyond just starting another company or taking a full-time role. This session will spark discussion around choices that come when income is no longer the driver. We'll explore and learn from each other about experiences or intentions on such things as moving to new geographies (or dividing time over multiple locations), keeping active in our industry, taking on leadership or board roles in existing non-profits, starting one or more new non-profit initiatives, advancing philanthropic interests or helping nextgen entrepreneurs to name just a few.

Travel for fun

Ralph Clark

SERGE members have had the good fortune of taking many fabulous trips. They've also had a few clunkers. In this session we'll share our favorite travel experiences, where and how we like to travel, tips for successful vacations, and what to avoid.

9:45 am – 10:00 am:

Break

10:00 am – 10:45 am

Needs and Leads/SERGE Feedback and Plans

Martin Babinec

Following our traditional Needs and Leads sharing, we'll gather comments and input for future SERGE planning and also announce our venue.

10:45 am – 11:15 am:

Session 5 Tales of New Orleans

Jim Letton

The Crescent City is the birthplace of jazz, a city bursting with personality and charm. Jim Letton, a history buff and community builder, has a deep understanding of the city's uniqueness and challenges. As the longest serving former US Attorney – appointed by successive presidents from different parties – who successfully prosecuted a Louisiana Governor, Jim will regale us with inside stories of this colorful town.

11:15 am – 11:30

SERGE Wrap Up

Martin Babinec/Mark Zitter



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The Ritz-Carlton, New Orleans LA
October 19 - 21, 2022

Friday – October 21, 2022 (Continued)

- 11:45 am:** Meet in hotel lobby to depart for lunch and Krewe of Boo Activities 5 minute walk [225 Decatur] House of Blues, Krewe of Boo Buffet Lunch (cash bar) Jazz Band and take part in the parade to Pat O'Briens
- 4:00 pm:** Everyone is on their own after the parade to enjoy the festivities and to be a part of the community.
- 5:15 pm – 6:15 pm:** SERGE book group (optional) Ritz Library Lounge Karen Drexler
- 6:20 pm** Meet in hotel lobby to depart for Galatoire's as a group for our reception [209 Bourbon Street] 5 minute walk
- 6:30 pm – 9:30 pm:** Cocktail hour followed by closing reception/dinner Galatoire's

CONTACT INFO FOR SUPPORT

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