

## Program Agenda 2017 Innovation & Asset Diversification March 28, 2017

Polls of investors and investment professionals have been conducted to determine their ideal investment scenario. One of the common responses is the goal of achieving a double-digit total return in all economic environments.

At this event, we are going to explore exciting 2017 Innovation & Investment diversification through asset class selection. Our programming features innovative leaders in fin-tech, robotics, med-tech, quantitative funds, real estate and social investing who will discuss what they do and how to achieve above average returns.

### Agenda

<b>5:00 PM</b>	Registration   Networking   Appetizers
<b>6:00 PM</b>	Welcome   Program introduction
<b>6:10 – 6:20 PM</b>	Simone Liu, Wells Fargo Advisors
<b>6:20 – 6:40 PM</b>	Presentation I – Med-Tech   Dr. Roger Wu   CEO   <i>Eyes 4 Lives</i> Q&A
<b>6:45 – 7:05 PM</b>	Presentation II – Real Estate   Ken Chong   EVP   <i>BRC Loans</i> Q&A
<b>7:10 – 7:30 PM</b>	Presentation III – Quantitative Fund   Gokham Kisacikoglu   CEO   <i>Quants, Inc.</i> Q&A
<b>7:35 – 7:45 PM</b>	VTeal Demonstration   Omkar Pallothu   Founder
<b>7:50-8:10 PM</b>	Presentation IV – Social Investing   Thomas Beattie   CFA & CEO   <i>Voleo</i> Q&A
<b>8:05- 8:25 PM</b>	Presentation V – Robotics   William Santana Li   CEO   <i>Knightscope, Inc.</i> Q&A
<b>8:30 PM</b>	Closing Remarks
<b>8:35 – 9:00 PM</b>	Networking   Meet the CEOs

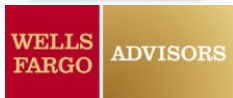
## Speakers & Presenting Companies

### Enzo Villani | CEO | *Equities.com*



- Entrepreneur in communications, digital, investor relations, media relations, capital markets, and retail/e-commerce. Built over eight companies and new business lines over the past 20 years utilizing funding from strategic, angel, private equity, venture capital, and debt sources.
- [Equities.com](http://Equities.com)® is a fintech company connecting emerging growth companies, global investors, executives, fund managers, financial experts, and industry professionals on one platform. They provide trading services, breaking editorial news coverage, and financial information on public and private companies

### Simone Liu | VP – Investments | *Wells Fargo Wealth Advisors*



- Simone's diversified international background serves as a solid foundation for her true understanding of the global markets. Born and raised in Brazil until the age of ten, Simone moved to Taiwan for seven years before living in the United States. She is a graduate of the University of California, Los Angeles (UCLA) economics department.
- Simone specializes in wealth management strategies and retirement planning helping individuals preserve their assets and increase their income. If you are planning on retiring, you have many decisions to make about the management of your retirement savings plan

### Dr. Roger Wu | CEO | *Eyes 4 Lives*



- Dr. Roger L. Wu is the founder and Chief Executive Officer of Eyes 4 Lives Inc. Roger Wu, O.D. graduated from the Pennsylvania School of Optometry in 1997 and was selected to be the first optometric intern for the 1996 Summer Olympic Games in Atlanta.
- Dr. Wu has spent the last 8 years focusing on the solutions, diagnosis and treatments for Computer Vision Syndrome, and developing the Dr. i-Coach® to reduce the growing prevalence of myopia. Dr. Wu has over 20 years of experience in the Optometry field diagnosing and treating patients with various ocular disorders, and he will continue to do so with innovations with Eyes 4 Lives.



**Kenneth Chong | EVP | BRC Loans**

- Ken is Executive Vice President with BRC Investment Company and oversees capital markets, with responsibility for raising investor funds for the commercial bridge fund.
- BRC Loans offers an alternative investment for investors seeking high-yield, monthly, passive income secured by a diversified portfolio of high interest rate, short term, first deed of trust mortgages.



**Gokhan Kisacikoglu | CEO | Quants, Inc.**

- Entrepreneur in risk management technologies and alternative investment products. Quantitative developer in alternative smart beta indices and products with financial derivatives for US index and sector portfolios. Software development for quantitative analysis, algorithmic asset allocation, and risk management strategies in US securities and commodities markets since 1998
- Specialist in alternative smart beta, quantitative finance, derivatives markets, business development and planning, computer simulations and visual effects development.



**Thomas Beattie, CFA | CEO | Voleo**

- Thomas Beattie is a former investment banker and returned to Vancouver, Canada in 2014 after spending seven years in London. Thomas is a CFA charterholder and holds a BComm (Finance) from Sauder School of Business at UBC.
- he Voleo platform enables users to form, fund and manage private investment club partnerships. The Voleo SimuTrader platform is available internationally; the live platform requires registration, approvals and/or exemption orders from applicable securities regulatory authorities in each jurisdiction. If you are a US resident, please visit [www.voleousa.com](http://www.voleousa.com) for details.





**William Santana Li | CEO | *Knightscope, Inc.***

- Bill Li has served as our Chairman and CEO since April 2013. He is an American entrepreneur with over 25 years of experience gained from several global assignments in the automotive sector and through founding and leading a number of startups
- Knightscope develops technology to predict and prevent crime utilizing autonomous robots, predictive analytics, and social engagement.



**Omkar Pallothu | Founder | *VTeal***

- Omkar is a Strategic Architect with an exceptional history of leading and implementing information delivery portals in Oracle Webcenter 11g, Oracle Portal 10g, Liferay Portal v6.2, Java, J2EE, SOA, BPM, Spring MVC, Hibernate, Ajax, JQuery and Angular JS. Over 18 years of experience in software design and development.
- Omkar is the founder of VTeal, which has a Cognitive AI Cloud that instantly creates a smart voice presence, The VTeal cloud can rapidly take the online services provided by your business and voice enable them through it Cognitive Engine.



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Contact: Brad Turner @ [brad@equities.com](mailto:brad@equities.com)



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Contact: Ken Chong @ [kchong@brcadvisors.com](mailto:kchong@brcadvisors.com)



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Contact: Bryan Lemster @ [bryan@halcyoninnovation.com](mailto:bryan@halcyoninnovation.com)





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Contact: Khris Thetsy @ [kthetsy@myicfos.com](mailto:kthetsy@myicfos.com)



The Medical Devices Group is largest medical device community in the world and the industry's only spam-free, curated forum for intelligent conversations with medical device thought leaders. Professionals in and serving the medical devices industry worldwide are invited to join the Medical Devices Group to help build their personal and corporate brands. <http://MedicalDevicesGroup.net>

Contact: Joe Hage @ [jhage@medicaldeviceevents.com](mailto:jhage@medicaldeviceevents.com)



**Med Tech Directory**

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Contact: Dan Golka @ [MedTechDirectory@gmail.com](mailto:MedTechDirectory@gmail.com)

**Thank you for attending the 2017 Innovation and Asset Diversification event**

**Name:** \_\_\_\_\_ **Email:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Company:** \_\_\_\_\_

1. Overall how would you rate the event:

\_\_\_ Very Satisfactory \_\_\_ Satisfactory \_\_\_ Neutral \_\_\_ Unsatisfactory

2. How was the venue?

\_\_\_ Very Satisfactory \_\_\_ Satisfactory \_\_\_ Neutral \_\_\_ Unsatisfactory

3. How was the format?

\_\_\_ Very Satisfactory \_\_\_ Satisfactory \_\_\_ Neutral \_\_\_ Unsatisfactory

4. How would you rate each speaker? (Circle on with 5 being the highest rating)

Dr. Roger Wu

1 2 3 4 5

Ken Chong

1 2 3 4 5

Gokhan Kisacikoglu

1 2 3 4 5

Thomas Beattie

1 2 3 4 5

William Santana Li

1 2 3 4 5

5. Please let us know how we could improve future events

\_\_\_\_\_  
\_\_\_\_\_

6. Would you prefer our events to be scheduled for Saturdays and weekends? Yes / No

7. Would you like to receive a follow up email with company presentations? Yes / No

8. What city do you live in? \_\_\_\_\_