



National Investor Relations Institute | Orange County

## **Private vs Public: To Be or Not to Be** **A Panel Discussion About Private Market Liquidity**

As companies are staying private longer, they need to find new solutions to provide interim liquidity to their shareholders and employees before a traditional exit. Many private companies are now choosing to facilitate company-controller private liquidity programs that allow existing share and option holders to sell a portion of their equity to company approved investors. Come learn from our panel about recent trends in secondary liquidity for private companies and best practices for these types of programs.

### OUR PANEL OF SPEAKERS:



**Nils Erdmann** has been a professional involved in investor relations, corporate finance and communications of leading media and technology companies since 2000. Prior to joining Battery East, he led the investor relations efforts for Twitter, Pixar Animation Studios, and Sonic Solutions. As head of IR at Twitter, Nils facilitated its capital raising efforts, including Twitter's 2013 initial public offering, as well as secondary placements and tender offers. Nils is also an alumnus of equity research at both Robertson Stephens and CIBC Oppenheimer. Nils has a bachelor's degree from Yale University.



**Peter Oey** joined LegalZoom in December 2014 as Chief Financial Officer. Peter comes to LegalZoom from MyLife.com where he served as their Chief Financial Officer from 2012 to 2014. At MyLife.com Peter was responsible for corporate & financial strategy, accounting, reporting, treasury, tax, risk management, investor relations, and customer care. Prior to MyLife.com Peter had spent over 12 years with Activision Blizzard, the world's leading publisher of interactive entertainment software, where he was VP, Corporate Controller and had served as the Head of Finance for Activision Europe and also Asia Pacific. Peter has a bachelor's degree from the University of Sydney, Australia and is a licensed CPA registered in Australia.



**Jeff Thomas** heads up liquidity solutions at NASDAQ Private Market. He and his team help private companies provide liquidity to their shareholders before an initial public offering through company-controlled Structured Liquidity Programs. Prior to NASDAQ, Jeff was Vice President of Business Development at Owlz, a crowdsourced database of private company information. From 2010 to 2013, he led SecondMarket's West Coast office as Senior Vice President where he helped to pioneer the secondary market for private company stock. Previously, he was a Vice President at Gerson Lerman Group, and a sales manager at Altera Corp. Jeff received his bachelor's degree in Electrical & Computer Engineering from Carnegie Mellon University. He holds FINRA Series 7, 24 & 63 licenses.

### OUR PANEL MODERATOR:



**Navid Alipour** is Co-founder & Managing Partner at Analytics Ventures. He is also the founder of La Costa Investment Group. Navid looks to address the need between angel investors and big venture capital funds. He plays an active role in building amazing teams and advisor boards that can raise money, generate revenue, and tackle their respective verticals from Healthcare to Internet of Things. Previously, he has managed approximately \$100 million at Fortune 500 financial services companies. He is a Business Advisor at CONNECT and advisor to several other San Diego startups. Navid is often a panelist, judge, speaker, and moderator on the topics of venture capital investing and entrepreneurship.

**Tuesday, November 3, 2015**

Registration: 3:45 pm

Begins at 4:00 pm thru to 6:30 pm

**Center Club**

650 Town Center Dr., Costa Mesa, CA

(714) 662-3414

**Members - \$45, Non-Members - \$60**

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