



SME FINANCE
FORUM

IMMERSION PROGRAM 2020



WELLS FARGO

January 22nd

The SME Finance Forum invites you to take part in an upcoming immersion program hosted by WELLS FARGO, in San Francisco, California, United States. Wells Fargo has been a leader in most of the US SME financing league tables, developing numerous innovations using data to drive new products and customer delivery channels. Wells Fargo calls itself “America’s leading small business lender”, and they’ve been particularly innovative in the unsecured business credit markets – thanks to their data edge. During the program, participants will learn how Wells Fargo learned to partner with fintech to offer valuable services for SME clients.



Location: Wells Fargo Conference Center
Date: January 22nd, 2019
Time: 8:00 – 17:00
Address: 333 Market Annex Bldg.: 2nd Floor, San Francisco, CA, 94105

AGENDA

08:00-11:00	Wells Fargo Small Business Lending Overview	Marc Bernstein and Xiao Bing – Wells Fargo
11:00-12:00	Small Business Risk Management	Senior risk manager (TBD)
12:00-13:00	<i>Lunch Break</i>	Location TBD
13:00-17:00	Fintech Presentation Size Up: Small Business Banking- New Customer Demands and Digital Expectations	Anatalio Ubalde, CEO & Founder, SizeUp

Additional information

For additional information, please send an email to [Tarun Srdihar](mailto:Tarun.Srdihar).

About SIZE UP

[SizeUp](#) helps banks better serve their small business customers. It empowers banks to help their SME customers succeed, increase engagement with SME customers, introduce banking products/services to SMEs at strategic decision-making moments in the business' lifecycle, increase acquisition of new customers, and retain existing customers. SizeUp is big data for small businesses. It provides business intelligence and market research to SME companies so they can make smarter decisions through data. SizeUp is licensed by large enterprises/organizations (such as banks) as a value-added service differentiator given to help their business customers succeed and grow. SizeUp currently provides competitive benchmarks; find customers, suppliers, and competitors; and best locations to advertise.

Presentation Topics

1. Small businesses want more than banking
2. What small businesses want from their banks
3. Interactive case study- Wells Fargo SizeUp

Social Media hashtag: #SMEFFStudyVisit #smefinance

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EXPERIAN

January 23rd

The SME Finance Forum invites you to take part in an upcoming immersion program hosted by EXPERIAN, in San José, California, United States.

Experian is a global leader in consumer and business credit reporting and marketing services and a constituent of the United Kingdom's FTSE 100 index, with total revenue for the year ended March 31, 2016, of US\$4.6 billion. They support clients in more than 80 countries and employ approximately 17,000 people across 44 countries.



Location: San José, California

Date: January 23rd, 2019

Time: 8:00 – 17:00

Address: TBC

Content Overview

The study visit will start with an introduction on the Story of Data Sophistication (Transforming a sea of disparate data sources including alternative data into insightful intelligence, automation for decisioning, and optimized customer experience), presented by our Senior Vice President Brian Bond. Participants will then have the chance to choose three consecutive break-out sessions. Each session will be focused on a relevant and compelling aspect on the power of data and/or analytics and led by one of Experian's subject matter experts. The four break-out sessions will feature demos of our latest innovations and solutions. After these break-outs, we will gather for closing remarks from Shelly Lummus, Experian Sales Vice President, followed by networking drinks. This stimulating, fun, and educational visit will put you at the forefront of the latest ideas, challenges, and innovations in the world of data and analytics.

Agenda

Introduction: Story of Data Sophistication- Transforming a sea of disparate data sources including alternative data into insightful intelligence, automation for decisioning, and optimized customer experience.

Breakout Sessions

1. New generation machine learning models for regulatory compliance
2. The role of alternative data sources in the current digital landscape
3. How to fully leverage your data and gain actionable insights using an intelligent on-demand analytics environment
4. Fulfilling the demand to integrate small business credit education into member experiences

Additional information

For additional information, please send an email to [Tarun Srdihar](mailto:Tarun.Srdihar).

Visit to fintechs: VEEM - KOUNTABLE

January 24th

Veem is a global payments network trusted by over 150,000 small businesses around the world. We let businesses pay their vendors, suppliers and contractors anytime, anywhere with our easy-to-use service. Using our proprietary multi-rail technology, businesses can send or receive money in a click, track their payments end-to-end, and even connect to their favorite accounting software – Quickbooks, Xero, or NetSuite.

Brief agenda:

- * Intros and presentations by Frederick Crosby
- * Global Payments Digital Transformation
- * Veem and Network Payments
- * Demonstration
- * Q&A

Kountable is a global trade and technology platform that delivers trust, transparency and auditability with data driven insights and real-time information from transactions where small and medium sized enterprises (SMEs) work with enterprise level suppliers and buyers. It facilitates business between qualified SMEs and multinational suppliers in order to efficiently complete large-scale projects for governments, NGOs and corporates. Launched in 2015, Kountable's global presence currently includes offices in San Francisco, Nairobi, Kigali and The Hague.

[Read more>](#)



Location: San Francisco, California
Date: January 24th, 2019
Time: 10:00 – 10:45
Address: 345 Broadway San Francisco, CA 94133



Location: San Francisco, California
Date: January 24th, 2019
Time: 11:00 – 01:00
Address: 321 Pacific Ave, San Francisco, CA 94111