



SME FINANCE
FORUM

IMMERSION PROGRAM 2020



WELLS FARGO

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 term loan and business line of 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

PRELIMINARY 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: 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

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