

## SMALL BUSINESS CAPITAL FORUM

Thursday, November 10, 2022  
7:30AM-1:30PM  
Amegy Bank Tower

[CLICK TO REGISTER](#)

### ABOUT THE EVENT

The vision of the Amegy Bank Small Business Capital Resource Forum is to promote financial inclusion through a resource-intensive, solutions-oriented, free half-day event that brings together small business owners and industry leaders who understand the needs of minority, women, LGBTQ+ and veteran-owned business owners and entrepreneurs.

Participants will have the opportunity to provide information about their business needs during the registration process which will help to match them with the integrated network of business support organizations and an Amegy Relationship Manager who can begin to work one on one to address their individual business needs.

The event speakers and panelists will focus on topics such as:

- Top Challenges and Solutions for Business
- Capacity Building
- Mentorship
- Non-traditional & Micro Financing
- Financial Education

### WHY IS THIS EVENT DIFFERENT?

Amegy Bank launched the Small Business Diversity Loan Program<sup>1</sup> (SBDLP) in 2021 to provide access to capital to fuel underserved small business capital needs. The program is a natural extension of Amegy Bank's culture and commitment to ensuring that everyone counts.

To promote and leverage SBDLP, we identified the need for an event that could provide tangible resources and connections that directly benefit our underserved small business communities. Our investment in the Small Business Capital Forum is a long-term commitment. We care about the long-term success of our customers.

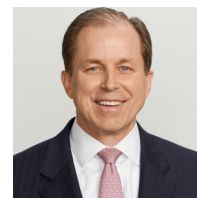
1. Subject to credit approval. Terms and conditions apply. See banker for details.

The University of Houston Texas Gulf Coast SBDC Network is a business advising and training center serving 32 counties in Southeast Texas. The SBDC program is funded in part through a Cooperative Agreement with the U.S. Small Business Administration.

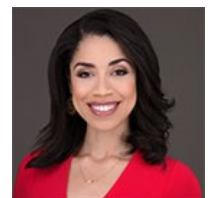
### SPONSORED BY:



### FEATURED SPEAKERS:



Laif Afseth  
President  
Amegy Bank



Amanda Edwards  
Co-Founder  
BEAMW



Amanda McMillan  
President & CEO  
United Way of  
Greater Houston



Andrew Moss  
Director of Minority  
Outreach  
National Director of  
Project REACH



Steve Stephens  
CEO  
Amegy Bank



Tené Thomas, CPA  
Partner,  
Tax & Accounting  
McConnell & Jones

## EVENT TOPICS

Amegy Bank acknowledges that businesses need more than financial capital to thrive. In addition, they need human and social capital. The Small Business Capital Forum will directly address small business owners' most common, and yet complex business needs and connect them with an integrated network of business support organizations. Topics that will be explored through presentations and panel discussions include:

### ACCOUNTING SERVICES

As small businesses experience growing demand for their services, they need investments in professional management to create focus on important functions such as financial reporting, tax planning, budgeting, cash flow forecasting. These important functions can be categorized into six Small Business Pillars of need. Engaging a diversified full-service accounting firm can help business owner prioritize their pillars of need that enable them to scale operations. Also, businesses that produce timely, consistent, quality financial reporting are more likely to gain and maintain access to credit markets throughout different business cycles.

Small Business Pillars of Need



### FINANCIAL EDUCATION

Business owners and entrepreneurs often describe periods of loneliness that heightens anxieties and limit growth. Professional coaching is a proven resource that may unlock untapped potential. Businesses that consistently apply financial principles over the long term tend to experience higher levels of success in accessing credit.

### COMMUNITY LENDING

Oftentimes, early-stage and growth capital is provided by mission driven community lenders. Community lenders often serve early-stage revenue generating businesses that are not quite ready for traditional financing. When an applicant is denied for traditional credit, these community lenders often serve to fill the gaps.

### MENTORSHIP

One important and less defined source of revenue are those opportunities that are created from mentor relationships between small and large businesses. The social networks that connect business developers of large businesses often do not extend to underserved businesses. As a result, underserved business owners that have equivalent capabilities are excluded from creating revenue opportunities through established relationships. Amegy Bank envisions an environment in which our small and large customers are networked together to develop mentoring relationships that are nurtured and spawn relationship-based business development opportunities.

## PARTICIPATING BUSINESS SUPPORT ORGANIZATIONS

