

*15th Annual*  
SILICON VALLEY  
**BOOMER VENTURE**  
*Summit*

\$10,000 BUSINESS PLAN COMPETITION

THE CLAREMONT CLUB & SPA BERKELEY, CALIFORNIA JUNE 20 & 21, 2018



**MARY FURLONG  
and ASSOCIATES**

Intelligence • Insight • Impact

EXECUTIVE PRODUCER

**WORKING  
TO ACHIEVE  
A BETTER,  
BRIGHTER  
FUTURE  
FOR 50+  
CONSUMERS**



**UnitedHealthcare proudly supports the  
2018 Silicon Valley Boomer Venture Summit.**



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MARY FURLONG  
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*15th Annual*

SILICON VALLEY  
BOOMER VENTURE  
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**\$10,000**  
BUSINESS PLAN  
COMPETITION


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We hope you will share insights and ideas from today's session:

 @SVBoomerVenture

 @SiliconBoomer  
#SVBoomer

CLAREMONT CLUB & SPA BERKELEY, CA JUNE 20 & 21, 2018

# ACKNOWLEDGEMENTS

We gratefully acknowledge the contributions of the following businesses and individuals for their invaluable assistance in creating such an exciting Summit.

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# RECOGNITION

## MARKETING PARTNERS

Aging 2.0  
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CALA

CITRIS  
HealthTech Capital  
Longevity Venture Advisors  
MedTech  
Parks Associates

Senior Housing News  
Start Up Health  
Stria

## EXHIBITORS

Aging2.0  
American Bone Health  
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FamilyGram Inc.  
Kytera Tech  
LifePod

LivPact  
Magnolia Prime  
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Motion Therapeutics  
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PhysioCue  
Senior Blue Book  
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uniper-care.com

## SUMMIT ORGANIZERS

EXECUTIVE PRODUCER: **Mary Furlong**, CEO, Mary Furlong & Associates

MANAGING PRODUCER: **Lori Bitter**, President & Senior Strategist, The Business of Aging

CO-PRODUCERS: **Susan Davis**, Susan Davis International and **Julia Rasooly**, CEO and Founder, PuraCath Medical Inc.; Venture Partner, Shikra Limited

MARKETING PRODUCER: **Michelle Maalouf**, Independent Consultant

MARKETING ASSISTANT: **Molly McMillan**

ONSITE OPERATIONS: **Jennifer Banta**

EXHIBITORS: **Jo Anne Morrison**

EXECUTIVE ADMINISTRATOR FOR MARY FURLONG & ASSOCIATES: **Annsley Hiles**

COMMUNICATIONS EDITOR: **Meaghan McMahon**, MBM Consulting

MFA: **Daniel Furlong**

MANAGEMENT OF CLIENT SERVICES: **Pat Stenson**

WEBSITE PARTNER: **Ryan McBurney**, Interactive Stategies

GRAPHIC DESIGN: **Barbara Lande**, Lande Design Studio

## REFRESHMENT BREAKS



## TRANSPORTATION SPONSOR



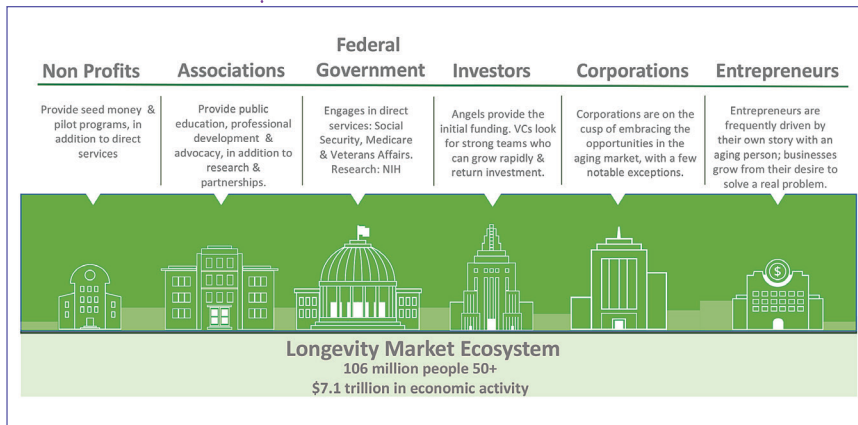
## WIRELESS SPONSOR



# WELCOME!

## Welcome to the 15<sup>th</sup> Annual Silicon Valley Boomer Venture Summit and Business Plan Competition.

We at **Mary Furlong & Associates** have made it our mission for the past 15 years to connect businesses, startups, entrepreneurs, nonprofits, and aging-industry experts by providing comprehensive education and networking opportunities led by professionals in these fields. We work to ally you with the right people and information that can propel your business to the next level. It is gratifying to see so many familiar faces return each year with their knowledge of the Longevity Marketplace and their interest in up-and-coming entrepreneurs. It is equally gratifying to see all the new faces attracted to this space, hoping to bring their ideas to fruition with the help of leading



industry thought leaders, venture capitalists, and other successful entrepreneurs. Former attendees know that this is the conference where deals get done.

This year's two-day conference is themed **Investment, Impact, and Opportunity in the Longevity Marketplace** and we have assembled more than 50 subject matter experts to help you navigate the path to success in the Longevity Marketplace. We are proud that so many alumni speakers and judges and past Business Plan

winner and participants have returned to contribute to our program.

**INVESTMENT** | Explore INVESTING PRIORITIES with **John Hopper**, The Ziegler Link•Age Longevity Fund, LP; **Scott Smith**, Viant Group; **Dr. Allison Sekuler**, Baycrest Health Sciences; **Kevin Qian**, Managing Partner of McDermott Will and Emery Shanghai; **Ranjeet Alexis**, Investment Director of Intel Capital; **Blake Wu**, Principal on the Med Team at NEA; and **Jill Ford**, Principal at Toyota AI Ventures will all be contributing to discussions on investing priorities and global investments.

**IMPACT** | Identify strategies that can make your product stand out from others in your niche. Find out why your target consumer decides to choose one innovation or technology over another and who or what influences that decision. Learn from companies that have learned from older adults themselves the best way to be successful in the longevity marketplace.

**OPPORTUNITY** | Meet people who can mentor you and help you advance your business. Pick the brains of some of the most successful executives in the Longevity Marketplace. Find out what type of investments or companies you can invest in and build your portfolio.

Take advantage of the opportunity to meet national media personnel from **MSNBC**; **NBC News**; **Forbes**; **The Economist**; and **The New York Times**, and media who cover the longevity, caregiver, and investment market.

**Dr. Charlotte Yeh**, Chief Medical Officer at AARP Services, Inc. will keynote the Summit with an aspirational look at life after 50, including a conversation on "The Voice of the Consumer" featuring Dr. Yeh with **Sherwin Sheik**, CareLinx; **Dan Trigub**, Lyft; and **Bill Yates**, GreatCall.

We are excited to host **AARP's Innovation Lab Pitch**, a new addition to the 2018 summit. Invited to pitch in this competition are companies who are focused on providing peace of mind to family caregivers through the use VR, AI and other disruptive technologies are invited to apply to pitch. The winner will be chosen by audience members through polling. The winning team will go on to the final **AARP Innovation Labs Pitch Event** in Washington, D.C. in the fall of 2018.


There are two additional opportunities to pitch, Pitch for Distribution and Growth Investor Pitch. These different pitch events serve companies in different stages of growth one is directed at companies whose product or service has produced a profit and are now looking for avenues of distribution and the other is for healthcare companies seeking a growth-equity investment and have revenue in excess of \$5M.

All three pitch panels, as well as the Business Plan Competition, boast judges that are highly regarded in their fields of expertise, including **Alisha Tharani**, Manager of Strategic Partnership, CABHI; **Jim Murphy**, Vice President of Innovation, UnitedHealthcare; **Martin Ng**, CIO, Sodexo; **Michael Skaff**, COO, Jewish Senior Living Group; **Clayton Yeko**, Business Development Strategist, CDW; **Sheri Rose**, CEO and Executive Director, Thrive Center, Inc.; **Robert Wray**, CEO, BlueStar SeniorTech; **Dan Hermann**, President and CEO, Ziegler; and **Michael Carroll**, Chief Marketing Officer, TripleTree.

According to AARP's 2016 Longevity Report, the 50-plus age group generates \$7.6 trillion in economic activity. By the year 2035, 21.4% of the population will be 65 and older and baby boomers are responsible for over half of consumer spending. Just imagine the countless opportunities to serve this population. Whether it is caregiving, healthcare, senior housing, technology, pharmaceuticals, transportation, home security, employment, financial planning and security, health and beauty, or petcare, we are all looking for the best approach to make a mark in this prosperous space. We are confident that each of you, as industry leaders and boomer marketing experts, will walk away from the Summit with insights and new connections that will undoubtedly bring your business to the next level.

Each year I look forward to the exchange of ideas and knowledge generated by this summit, but even more exciting is the energy and enthusiasm that comes from a shared sense of purpose and opportunity. I hope you discover new trends, gather new data about this demographic, and find new business models that can inspire your own vision. More than that, I hope you will engage this community of brilliant thought leaders and most importantly, that I see you here again in 2019!

All the best,



**Mary Furlong**

CEO Mary Furlong & Associates

Executive Producer, Silicon Valley Boomer Venture Summit

Dean's Executive Professor of Entrepreneurship, Leavey School of Business, Santa Clara University

Founder, SeniorNet.org (1986), ThirdAge Media (1996), Mary Furlong & Associates (2002)

# AGENDA

WEDNESDAY, JUNE 20, 2018  
8:00 AM – 5:00 PM

8:00 AM – 9:00 AM

Claremont Lobby

## REGISTRATION

REFRESHMENTS & COFFEE

9:00 AM – 10:15 AM

Rockridge A

## SESSION I

### LEVERAGING TODAY'S MEDIA LANDSCAPE FOR THE LONGEVITY ECONOMY

Today's 50+ consumers are a diverse population with a range of communications choices and preferences. In this session, we'll look at the current landscape of media serving older people, helping you navigate trends in mainstream, niche and social media. You'll learn how and where to best connect with your target audience, and how to leverage community, content and collaboration for maximum engagement.

#### MODERATOR:

**Susan Donley**, Publisher and CEO, *Stria*

#### PANELISTS:

**Paul Kleyman**, National Coordinator, *Journalist Network on Generations*

**Sherri Snelling**, CEO, *Caregiving Club*

**Lisa Sullivan**, EVP and Managing Director, *Ketchum NA Technology Practice*

Rockridge B

### NEXT GENERATION DESIGN IN SENIOR LIVING

Today's older adults are demanding more options, choices, and customization when it comes to living in senior housing communities or in their existing homes. These demands are challenging operators, regulators, and developers to rethink their existing programs, designs, and community options. As they prepare for the future, while baby boomers look for alternative solutions outside the traditional senior care continuum, industry leaders step up to address market demands. Hear from a panel of senior living experts on how they are addressing emerging trends, challenges, and opportunities and how entrepreneurs can leverage current demands for future success.

#### MODERATOR:

**George Yedinak**, Executive Vice President, Publisher and Founder, *Senior Housing News*

#### PANELISTS:

**Frank Rockwood**, Co-Founder and President, *Rockwood Pacific*

**Candiece Milford**, Managing Director of Marketing, *Rhoda Goldman Plaza*

**Michelle Moros**, Executive Director, *Belmont Village*

**Paul Gordon**, Partner, *Hanson Bridgett LLP*

Rockridge C

### FINTECH 101: FINANCIAL RESILIENCE ACROSS LIFE EVENTS

New financial planning tools are emerging that leverage technology and help to solve issues like assisting with finances in a caregiving role; helping young families fund education, pay back student loans, and more. To do that, financial services also needs to better understand populations typically underserved by the financial world—such as women—and better understand what's in their hearts and minds as they journey through key life stages. Meet the entrepreneurs solving these issues. Learn how younger generations are embracing fintech solutions and will influence their aging parents' adoption of new ways to solve old problems.

#### MODERATOR:

**Michelle Bartel**, Senior Financial Consultant, *Charles Schwab*

#### PANELISTS:

**YoonJin Chang**, Co-Founder and Director of Corporate Development, *LifeSite*

**Erin McInrue Savage**, Senior Vice President, *Age Wave*

**Cora Tellez**, CEO and Founder, *Amazing Care Network, Inc*

**Howard Tischler**, Co-Founder and CEO, *Eversafe*

**Chris Wong**, Chairman and CEO, *LifeSite*

# AGENDA

10:30 AM – 11:45 AM

Rockridge C

## SESSION II

### MAKING SALES AND MARKETING MORE EFFECTIVE

Value creation and consumer experience is at the heart of today's marketing. Everyone from Amazon and Apple down to mom and pop companies are in the content creation business. Join us to learn about content creation, social selling, and the continuing importance of video in marketing and search.

You will hear from experts in the field the importance of being a creator and how to use video to drive sales.

Understand the fundamentals of social selling and how it is working for successful companies. Gain insight into the latest tools for driving consumer engagement.

#### MODERATOR:

**Lori Bitter**, President and Senior Strategist, *The Business of Aging*; Co-Producer, *SV Boomer Venture Summit*

#### PANELISTS:

**Jay Grant**, Vice President of Marketing, *GreatCall*

**Brigit Hassig**, Managing Project Director, *Masterpiece Living*; President, *IntelligentAge LLC*

Rockridge B

### THE POWER OF PARTNERSHIP—HOW TO FUEL YOUR LONGEVITY BUSINESS ENGINE

Getting started with funding your longevity innovation product or service is one thing but finding the right roadway and the fuel to go the distance requires strong partnerships. At the intersection of aging, business, and technology is one sign in red lights: SCALE. These interesting partnerships explain what sparked their interest in each other, the challenges and advantages of fusing innovation and distribution, how they are testing their concepts for fast growth and why key partnerships are driving their business and their mission forward.

#### MODERATOR:

**Sherrri Snelling**, CEO, *Caregiving Club*

#### PANELISTS:

**Jeff Maltz**, CEO and Co-Founder, *SilverRide*

**Aaron McPherson**, Vice President of Operations, *Center for Elders' Independence*

**Sheri Rose**, CEO and Executive Director, *Thrive Center, Inc.*

**Robert Wray**, CEO, *Blue Star Senior Tech*

Rockridge A

### THE BLUEPRINT TO THE LONGEVITY ECONOMY: INVESTORS AND INFLUENCERS BREAK DOWN THE ECOSYSTEM FOR SUCCESS

Forward-thinking investors and leaders in the field of aging are critical partners in achieving significant impact and success in the longevity marketplace. This session brings together investors and influencers in aging to discuss the ecosystem, their role in a company's growth, and the intersection of interests. This session will explore what the venture capital and aging communities can learn from each other; where the opportunities are to collaborate to improve outcomes; and how we can work together to capitalize on the global demographic shift.

#### MODERATOR:

**Mary Furlong**, CEO, *Mary Furlong & Associates*; Executive Producer, *SV Boomer Venture Summit*

#### PANELISTS:

**Natasha Ashton**, Co-Founder, *Petplan*

**Mel Barsky**, Director, *Centre for Aging + Brain Health Innovation*

**Anne DeGheest**, Founder and Managing Director, *HealthTech Capital*

**Jack York**, President and Co-Founder, *ItsNever2Late*

12:00 PM – 1:00 PM

Meritage Room

### NETWORKING LUNCH

SPONSORED BY:



# AGENDA

1:15 PM – 2:30 PM

Rockridge A

## VIP BRIEFING: AN INSIDE LOOK AT INVESTING IN THE LONGEVITY MARKET

These investors and stakeholders will share their perspectives on the biggest market opportunities; the types of entrepreneurs they are working with and their investment stages. In this interactive session, the panelists will share what inspired them to move into the Longevity market and companies that are succeeding in the market. The audience will have an opportunity for questions and answers.

### MODERATOR:

**Mary Furlong**, CEO, [Mary Furlong & Associates](#); Executive Producer, [SV Boomer Venture Summit](#)

### PANELISTS:

**Mel Barsky**, Director, [Centre for Aging + Brain Health Innovation](#)

**Dan Gebremedhin**, Principal, [Flare Capital Partners](#)

**John Hopper**, Chief Investment Officer, [The Ziegler Link•Age Funds, LP](#)

**Martin Ng**, CIO, [Sodexo Global Home Care](#)

Rockridge C

## JOINTS AND JOINT HEALTH

This session will feature a panel discussion to highlight solutions that improve both the quality of care and the quality of life for our global aging population. Healthy joints are critical to maintain a mobile and active lifestyle. Wireless gait/balance assessments, range of motion testing, and a device that enhances bone health will be explored. Our panelists will also share perspectives on alternative wellness solutions such as the use of Cannabis (joints) including contrasting the impacts of medical marijuana versus CBD oil made from hemp. Can you experience the health benefits without the high?

### MODERATOR:

**John P. Reinhart**, Managing Director, [Innovators Alliance](#); Co-Founder, [Academic Platform](#)

### PANELISTS:

**Jeff Amrein**, CEO and Founder, [Extract Wellness LLC](#)

**Kathleen Cody**, Executive Director, [American Bone Health](#)

**Cynthia Gibson-Horn**, Co-Founder, [Motion Therapeutics](#)

**Peter Simonson**, President and Board Member, [Juvent Health](#)

**Carrie Tice**, CEO and Co-Founder, [Octavia Wellness](#)

2:30 PM – 5:00 PM

Rockridge A

## CHINA BRIEFING

The 21st Century has been dubbed “The Century of the Pacific” to describe booming trade between the world’s two largest economies, China and the United States. China’s aging population is now the largest in the world and will reach over 240 million older adults by 2028. Currently there are over 23 million Chinese over the age of 80. The burgeoning demand for services for older adults in China has become one of the fastest growing markets in the world, with the greatest expansion of residential and home and community-based services occurring in the private pay market. This briefing will provide insights from experts in the demography, investment, regulatory, and provider sectors regarding both the opportunities and challenges for engaging in the world’s largest aging market, including innovative strategies for investors and providers alike.

### INTRODUCTION AND WELCOME:

**Dr. David Lindeman**, Director of the [CITRIS Health Initiative](#), [UC Berkeley](#)

**John Hopper**, Chief Investment Officer, [The Ziegler Link•Age Funds, LP](#)

### OVERVIEW OF THE MARKET:

**Roseann Lake**, Author and Journalist, [The Economist](#)

**Rui Ma**, Founder, [Euzen Labs](#)

### DOING BUSINESS IN CHINA—MARKET, LEGAL, AND REGULATORY PERSPECTIVES:

**Kevin Qian**, Managing Partner, [McDermott Will and Emery Shanghai](#)

**TBD**, China Task Force, [Bay Area Council](#)

# AGENDA

## VIEW FROM THE VCS AND ANGELS:

**Chon Tang**, Fund Manager, [Skydeck Venture Fund](#), UC Berkeley

**Jing Ge**, Manager of Partnerships, [CITRIS](#), UC Berkeley

**Shan Lu**, Fund Manager, [LeaguerX](#)

**Ping Zhang**, Co-Founder, [Jintel Health](#)

## Q&A MODERATORS:

**David Lindeman**, Director of the [CITRIS Health Initiative](#), UC Berkeley

**John Hopper**, Chief Investment Officer, [The Ziegler Link•Age Funds](#), LP

2:30 PM – 3:30 PM

*Rockridge C*

## ENTREPRENEURS ON THE LEADING EDGE

Entrepreneurs are building innovative solutions for senior living including new advances in AI, therapy devices, and nutraceuticals. Our interactive conversation illuminates insights on success strategies for ground-breaking products and how to bring them to market creating health outcomes and business growth. We dive into what is working, not working, and how to realize the potential of leading edge innovations that positively transform our lives.

### MODERATOR:

**Catherine Calarco**, Executive in Digital Health, [AI and Robotics](#)

### CONNECTED CARE:

**YoonJin Chang**, Co-Founder & Director of Corporate Development, [LifeSite](#)

**Bryan Chasko**, Chief Technology Officer, [SameDay Security](#)

**Stuart Patterson**, CEO, [LifePod](#)

3:30 PM – 5:00 PM

*Rockridge B*

## LESSONS FROM THE WINNERS: WHAT ENTREPRENEURS NEED TO KNOW

Come learn from serial entrepreneurs and founders on how to start a business, how to find the right co-founder, hiring a managing a team, managing a board of directors and board of advisors, managing a clinical trial, setting timelines and expectations, and getting FDA approval for a medical device, managing investors and frequency of communication with them, derisking the business and product development, creating a strong IP portfolio, and much more.

### MODERATOR:

**Julia Rasooly**, CEO and Founder, [PuraCath Medical Inc.](#); Venture Partner, [Shikra Limited](#), and winner of the 2011 SV Business Plan Competition

# AGENDA

THURSDAY, JUNE 21, 2018  
8:00 AM – 6:00 PM

7:30 AM

*Claremont Lobby*

## REGISTRATION

*REFRESHMENTS & COFFEE*

7:30 AM

*Claremont Ballroom*

## EXHIBITS OPEN

8:00 AM – 9:20 AM

*Rockridge A*

## BREAKFAST WITH ANGELS

*CONTINENTAL BREAKFAST & PANEL*

Discover the priorities of Angel, Seed, and Social Impact investors as they describe the kinds of investments they are making in the longevity marketplace. Most entrepreneurs begin with angel investors who provide business development, sales, strategy and their networks and experience. Increasingly, entrepreneurs are turning to social impact investors who view aging as a triple bottom line opportunity—financial, social, and personal—particularly meeting the needs of the large under-served and financially challenged population.

The latest data and trends will be shared to inform the investment thesis of those planning to invest in the longevity market.

8:00 AM – 8:40 AM

*Rockridge A*

## MARKET OVERVIEW AND RESEARCH BRIEFING FROM THE EXPERTS

Leading analysts will share how to help shape growing and funding market priorities by sharing market data.

### MODERATOR:

**Lori Bitter**, President and Senior Strategist, *The Business of Aging*; Co-Producer, *SV Boomer Venture Summit*

### PANELISTS:

**Roseann Lake**, Author and Journalist, *The Economist*

**Erin McInrue Savage**, Senior Vice President, *Age Wave*

8:40 AM – 9:20 AM

*Rockridge A*

## ANGEL PANEL—SEED AND SOCIAL IMPACT INVESTORS

Leading analysts will share how to help shape growing and funding market priorities by sharing market data.

### MODERATOR:

**Paul Stich**, Angel Investor and Advisor

### PANELISTS:

**Sonia Arrison**, Co-Founder, *Unsweet Media*, Founder, *100 Plus Capital*

**Trish Costello**, CEO and Founder, *Portfolia*

**Anne DeGheest**, Founder and Managing Director, *HealthTech Capital*

**Ulya Ahmed Khan**, President and Managing Partner, *Wemanage Services*

**Julia Rasooly**, CEO and Founder, *PuraCath Medical Inc.*; Venture Partner, *Shikra Limited*

**Benjamin Reinhardt**, Entrepreneur in Residence, *Susa Ventures*

8:00 AM – 9:20 AM

*Rockridge A*

## BREAKFAST WAKE-UP SESSIONS: MARKETING AND TECHNOLOGY

*Continental Breakfast & Panel*

# AGENDA

8:00 AM – 8:40 AM

*Rockridge B*

## TECH COMPANIES INVESTING INTO THE LONGEVITY MARKET

This panel will discuss promising areas of innovation including Wearables, Internet of Things, and the growing range of integrated services in healthcare that will help drive the industry from episodic care to more continuous care, and help older adults safely live independently longer.

### MODERATOR:

**Michael Skaff**, COO, [Jewish Senior Living Group](#)

### PANELISTS:

**Dr. David Lindeman**, Director of the CITRIS Health Initiative, [UC Berkeley](#)

**Stuart Patterson**, CEO, [LifePod](#)

**Dor Skuler**, CEO and Co-Founder, [Intuition Robotics](#)

8:40 AM – 9:20 AM

*Rockridge C*

## WAKE-UP SESSION MARKETING

Learn how to build your brand and scale your business in the longevity marketplace. Discover the best strategies for using Google search and YouTube; find out how to grow your revenue to the 'double digits' with Facebook advertising and how one of the largest home care agencies attracts new customers with a multichannel approach to marketing.

### MODERATOR:

**Grace Zavolock**, Performance Marketing Manager, [Home Care Assistance](#)

### PANELISTS:

**Erika Feinberg**, Multi-Channel Marketing and Operations Officer, [Growth Accelerator, ApexOutcomes](#)

**Nicole Franz**, Account Manager, [Google](#)

**Darren Lancaster**, Partner, [Marketing and eCommerce Strategic Partnerships](#)

9:20 AM – 9:30 AM

## BREAK—MEET THE EXHIBITORS

9:30 AM – 9:33 AM

## WELCOME REMARKS

*Empire Ballroom*

**Mary Furlong**, CEO, [Mary Furlong & Associates](#); Executive Producer, [SV Boomer Venture Summit](#)

9:33 AM – 10:05 AM

## ELEMENTS: NEW TED-STYLE TALKS

### APARTMENTS FOR LIFE (A4L); EXPANDING ALTERNATIVES FOR SENIORS

Serving seniors in a multi-family setting in which services are effectively unbundled provides a more affordable alternative for seniors who can't afford or don't need the services included in typical independent living settings. This talk assesses the opportunities and challenges of Apartments for Life (A4L), a promising and emerging subcategory within senior living.

**Frank Rockwood**, Co-Founder and President, [Rockwood Pacific](#)

### DELIGHT BY DESIGN

Step into a world where fashion, form, and function thrive at every age. An inspiring review of cutting-edge designs that are transforming how we view products, places, and people.

**Sarah Thomas**, Executive-in-Residence, [Aging2.0](#); Vice President of Product, [Seismic Holdings, Inc.](#)

TBD

10:05 AM – 10:45 AM

## PITCH FOR DISTRIBUTION TO THE CORPORATIONS AND ORGANIZATIONS INVESTING IN THE LONGEVITY ECONOMY

Watch companies pitch to investors! These companies are in the boomer, senior, or caregiver market space and have successfully developed their product or service to produce a profit. The next stage of growth is to provide distribution partners that help scale and build their enterprise.

(3 PITCHES WILL BE PRESENTED)

# AGENDA

10:45 AM – 11:15 AM

11:15 AM – 11:40 AM

*Empire Ballroom*

11:40 AM – 12:10 PM

*Empire Ballroom*

12:10 AM – 1:10 PM

*Empire Ballroom*

## MODERATOR:

**Eric Taub**, Contributing Writer, *The New York Times*

## CORPORATIONS:

**Alisha Tharani**, Manager of Strategic Partnership, Centre for Aging + Brain Health Innovation

**Jim Murphy**, Vice President of Innovation, UnitedHealthcare

**Martin Ng**, CIO, Sodexo Global Home Care

**Sheri Rose**, CEO and Executive Director, Thrive Center Inc.

**Michael Skaff**, COO, Jewish Senior Living Group

**Clayton Yeko**, Business Development Strategist, CDW

## PRESENTERS:

**Oliver Hersch**, CEO, Seniors Blue Book

**Robert Wray**, Rear Admiral USN (Ret.), CEO, BlueStar SeniorTech

TBD

## NETWORKING BREAK

## MORNING KEYNOTE

### INTRODUCTION:

**Richard K. Lui**, News Anchor, MSNBC and NBC News

### KEYNOTE

**Dr. Charlotte Yeh**, Chief Medical Officer, AARP Services, Inc.

## VOICE OF THE CONSUMER PANEL

Successfully engaging older adult consumers in the design of products and services meant to benefit them can be challenging. Product designers often struggle to understand why the mature consumer decides to adopt one innovation or technology over another and who or what convinces them to take that step. Learn from companies that have learned from older adults themselves the best way to be successful in the longevity marketplace.

### MODERATOR:

**Richard K. Lui**, News Anchor, MSNBC and NBC News

### PANELISTS:

**Sherwin Sheik**, Founder and CEO, CareLinx

**Dan Trigub**, Regional Vice President, Lyft

**Bill Yates**, Chief Consumer Officer and CMO, GreatCall

**Dr. Charlotte Yeh**, Chief Medical Officer, AARP Services, Inc.

## “LUNCH AND LEARN” WITH MARKET LEADERS, ANGEL INVESTORS, VENTURE CAPITALISTS, AND ENTREPRENEURS

These hosted tables give you the opportunity to connect with angel investors, corporate VCs, CEOs, research analysts, bloggers, and authors over a delicious lunch at the Claremont Hotel.

“Lunch and Learn” with the expert of your choice. This year’s Summit is packed with content! This special lunch session allows you to spend more time with Summit speakers in a small, conversational learning environment organized to build your skills.

**Mary Furlong**, CEO, *Mary Furlong & Associates*; Executive Producer, *SV Boomer Venture Summit*

**Lori Bitter**, President and Senior Strategist, *The Business of Aging*; Co-Producer, *SV Boomer Venture Summit*

**Ranjeet Alexis**, Investment Director, *Intel Capital*

**Fahad Aziz**, Digital Health Contributor, *Forbes Magazine*

**Anne DeGheest**, Founder and Managing Director, *HealthTech Capital*

# AGENDA

**Jennifer Draklellis**, Director of Innovation and Business Development, **UnitedHealthcare**  
**Chantalle Dumonceaux**, Co-Founder and Advisor, **WOMENA**  
**Erika Feinberg**, Multi-Channel Marketing and Operations Officer, **Growth Accelerator**,  
**ApexOutcomes**  
**Jill Ford**, Principal, **Toyota AI Ventures**  
**Dan Hermann**, President and CEO, **Ziegler**  
**Jody Holtzman**, Senior Managing Partner, **Longevity Venture Advisors LLC**; **Margaret Drumheller**,  
Managing Director, **Longevity Venture Advisors LLC**  
**John Hopper**, Chief Investment Officer, **The Ziegler Link•Age Funds, LP**  
**Ulya Ahmed Khan**, President and Managing Partner, **Wemanage Services**  
**Paul Kleyman**, National Coordinator, **Journalist Network on Generations**  
**Roseann Lake**, Journalist and Program Editor, **The Economist**  
**Candiece Milford**, Managing Director of Marketing, **Rhoda Goldman Plaza**  
**Jim Murphy**, Vice President of Innovation, **UnitedHealthcare**; **Cheri Geraffo**, National Account  
Director, **UnitedHealthcare**  
**Donnacha O'Sullivan**, Vice President, **TT Capital Partners**  
**Dr. Allison Sekuler**, Managing Director Rotman Research Institute, **Sandra A. Rotman Chair in**  
**Cognitive Neuroscience**; Managing Director, **Centre for Aging + Brain Health Innovation**;  
and Vice-President Research, **Baycrest Health Sciences**  
**Scott Smith**, Founder and Partner, Managing Director, **Viant Group**  
**Sherri Snelling**, CEO, **Caregiving Club**  
**Paul Stich**, Angel Investor and Advisor  
**Eric Taub**, Contributing Author, **New York Times**  
**Alisha Tharani**, Manager of Strategic Partnerships, **Centre for Aging Brain + Health Innovation**;  
**Mel Barsky**, Director, **Centre for Aging + Brain Health Innovation**  
**Blake Wu**, Principal on the Med Team, **NEA**  
**Dr. Charlotte Yeh**, Chief Medical Officer, **AARP Services, Inc.**

1:10 PM – 2:00 PM

*Empire Ballroom*

## CAREGIVING PITCH COMPETITION: AARP INNOVATION LABS

During this Competition, companies who are focused on providing peace of mind to family caregivers through the use of VR, AI, and other disruptive technologies will pitch. The winner will be chosen by audience members through polling. The winning team will go on to the final AARP Innovation Labs Pitch Event in Washington, D.C. in the Fall of 2018.

### EMCEE:

**Dr. David Lindeman**, Director of the CITRIS Health Initiative, **UC Berkeley**

### PANELISTS:

**Ted Fischer**, Co-Founder and CEO, **Ageless Innovation**

**Jill Ford**, Principal, **Toyota AI Ventures**

**Sherwin Sheik**, Founder and CEO, **CareLinx**

### FINALISTS TO BE ANNOUNCED

2:05 PM – 2:50 PM

*Empire Ballroom*

## WHAT ARE YOUR INVESTING PRIORITIES?

Investors in the longevity marketplace will talk about what trends will dominate the market in the coming year and where smart investors are putting their money.

### MODERATOR:

**Michael Carroll**, Chief Marketing Officer, **TripleTree**

**Mary Furlong**, CEO, **Mary Furlong & Associates**; Executive Producer, **SV Boomer Venture Summit**

### PANELISTS:

**Ranjeet Alexis**, Investment Director, **Intel Capital**

**John Hopper**, Chief Investment Officer, **The Ziegler Link•Age Funds, LP**

**Katy Fike, Ph.D.**, Partner, **Generator Ventures**

**Jill Ford**, Principal, **Toyota AI Ventures**

# AGENDA

2:50 PM – 3:50 PM

*Empire Ballroom*

**Dr. Allison Sekuler**, Managing Director Rotman Research Institute, **Sandra A. Rotman Chair in Cognitive Neuroscience**; Managing Director, **Centre for Aging + Brain Health Innovation**; and Vice-President Research, **Baycrest Health Sciences**  
**Scott Smith**, Founder and Partner, Managing Director, **Viant Group**  
**Blake Wu**, Principal on the Med Team, **NEA**

## BUSINESS PLAN COMPETITION

Three companies will be pitching for growth stage investing. Our three finalist entrepreneur groups will compete for the \$10,000 grand prize by presenting their boomer business plans before a panel of judges comprised of leaders in the field of aging and the venture capital community.

### MODERATOR:

**Michael Carroll**, Chief Marketing Officer, **TripleTree**

### JUDGES:

**Ranjeet Alexis**, Investment Director, **Intel Capital**

**Katy Fike, Ph.D.**, Partner, **Generator Ventures**

**Jill Ford**, Principal, **Toyota AI Ventures**

**John Hopper**, Chief Investment Officer, **The Ziegler Link•Age Funds, LP**

**Dr. Allison Sekuler**, Managing Director Rotman Research Institute, **Sandra A. Rotman Chair in Cognitive Neuroscience**; Managing Director, **Centre for Aging + Brain Health Innovation**; and Vice-President Research, **Baycrest Health Sciences**

**Scott Smith**, Founder and Partner, Managing Director, **Viant Group**

**Blake Wu**, Principal on the Med Team, **NEA**

### FINALISTS:

TBD

3:50 PM – 4:05 PM

## AFTERNOON NETWORKING BREAK

4:05 PM – 4:40 PM

*Empire Ballroom*

## GROWTH INVESTOR PANEL AND PITCH

Companies serving the longevity economy have started to scale, with some companies reaching the growth-equity investment stage (post angel/seed money and/or venture capital investment). On this panel you'll hear perspectives from both growth-equity investors and business leaders seeking their next round of capital. Panelists will share their investment theses and articulate the attributes that make companies compelling to this type of investor. Five companies will then pitch the panel for the opportunity to meet with their firm to explore a potential growth-equity investment. Each of the pitching companies has achieved an existing level of success, seeks additional capital to support continued growth, and meets the following criteria:

- \* Healthcare company with revenue of \$5 million+
- \* Serving a segment of the industry with a \$500 million+ addressable market
- \* Innovative category leader with proprietary technology, first-to-market advantage, and a strong management team

### MODERATOR:

**Fahad Aziz**, Digital Health Contributor, **Forbes Magazine**

### PANELISTS:

**Michael Carroll**, Chief Marketing Officer, **TripleTree**

**Dan Hermann**, President and CEO, **Ziegler**

**Jody Holtzman**, Senior Managing Partner, **Longevity Venture Advisors LLC**

**Donnacha O'Sullivan**, Vice President, **TT Capital Partners**

### PRESENTERS:

TBD

# AGENDA

4:05 PM – 4:40 PM

*Rockridge A*

## POWER "SPEED DEALING" SESSION

We all know the power of networking and building relationships. Most conferences will give you educational sessions to attend but don't allow for you to actually come home with qualified leads. Now you can meet those qualified leads at the Silicon Valley Boomer Venture Summit Speed Dealing session. Mingle in a minute with high-quality individuals, prospects, and leads and identify exactly who you would like to meet.

Whether you are an entrepreneur looking for investors, investor looking for deal flow, startup looking for distribution, or established companies and nonprofits looking for market innovations – join us for the ultimate speed networking session that will shine the spotlight on the most important brand in the room—yours! Come ready to speak efficiently and SPEEDILY about yourself, your company, and the deals you want to make.

### ORGANIZED BY:

**Caitlin Kaplan**, Co-Founder, Quality Start Consulting

SPONSORED BY:



4:40 PM – 4:50 PM

## BRIEF AFTERNOON BREAK

4:50 PM – 5:05 PM

## CLOSING SESSION

*Empire Ballroom*

## WRAP-UP

**Jeff Zimman**, Co-Founder and Chairman, Posit Science

## BUSINESS PLAN AWARD PRESENTATION AND CLOSING REMARKS

**Heidi Culbertson**, Founder and CEO, Marvee

**Mary Furlong**, CEO, Mary Furlong & Associates; Executive Producer, SV Boomer Venture Summit

**Julia Rasooly**, CEO and Founder, PuraCath Medical Inc.; Venture Partner, Shikra Limited

5:05 PM – 6:00 PM

*Meritage Room*

## NETWORKING RECEPTION

SPONSORED BY:



# SPEAKER BIOGRAPHIES



## **Ranjeet Alexis, Investment Director, Intel Capital**

Ranjeet's current focus is in the health, genomics and life sciences sector to identify disruptions through technology. Some of his notable investments in this area include Synthego, a CRISPR genome company, Echopixel, a 3D medical imaging company and Tobii, an eye tracking company for the disabled to help them interact with technology.



## **Jeff Amrein, CEO and Founder, Extract Wellness LLC**

Jeff Amrein is the CEO of Extract Wellness. Extract Wellness is a hemp extract products company, primarily serving the medical/natural healing community. Extract Wellness products have been very successful helping customers with serious illnesses such as Arthritis, Crohn's, Cancer and Pain.



## **Sonia Arrison, Co-Founder, Unsugarcoat Media and Founder, 100 Plus Capital**

Sonia Arrison is a best-selling author, analyst, entrepreneur, and investor. She is founder of 100 Plus Capital, co-founder of Unsugarcoat Media, and associate founder and advisor to Singularity University in Mountain View, California. Her research focuses on exponentially growing technologies and their impact on society.



## **Natasha Ashton, Co-Founder, Petplan**

Natasha Ashton is the co-founder of Petplan, a technology focused, data driven, customer centric pet insurance provider that today protects close to 200,000 pets nationwide and is projected to write over \$130 million in gross written premium for 2018.



## **Fahad Aziz, Digital Health Contributor, Forbes Magazine**

Fahad is a contributor to Forbes where he covers innovations that are reinventing and reshaping senior care industry. He is also CTO/Co-Founder of CareMerge, a digital health company ensuring the aging experience is filled with peace of mind and joy.



## **Jacqueline Baker, Innovation Program Manager, AARP**

Jacqueline M. Baker is the Innovation Program Manager for AARP Innovation Labs, where she is responsible for accelerating the AARP innovation ecosystem by curating programming and experiences for both startups and organizations to influence, shape and co-create products and services that empower people to choose how they live as they age.



## **Lori Bitter, The Business of Aging**

Lori provides strategic consulting, custom research programs, and business development opportunities for companies seeking to engage with mature consumers and their caregivers.



## **Catherine Calarco, Executive in Digital Health, AI and Robotics**

Over 20 years global leadership experience generating significant B2C/B2B revenue growth and developing innovative award winning technology products. Leadership includes Massachusetts Institute of Technology (MIT), Sabre, Applied Biosystems, HeartMath, Spire, eQuility, and several Digital Health & AI companies.



## **Michael Carroll, Chief Marketing Officer, TripleTree**

Michael Carroll leverages his 25+ years of healthcare, financial services and retail experience to advance Triple Tree's healthcare merchant banking platform.



## **YoonJin Chang, Co-Founder and Director of Corporate Development, LifeSite**

YoonJin Chang is a former partner of the first Korean startup accelerator, Kstartup investing and managing over 40 startups globally. Voted 2013's "Most Promising Female Entrepreneur" in Korea. She has had numerous TV shows in Korea.



## **Kathleen Cody, Executive Director, American Bone Health**

Kathleen Cody and American Bone Health are on a mission to engage, educate and activate individuals to build and keep strong bones for life through a network of trained Peer Educators. Kathleen received her BA from UNC-Chapel Hill and her MBA from the University of San Francisco.



## **Dave Coluzzi, CEO, Carlton Senior Living**

David Coluzzi, a senior care executive with more than 26 years of industry experience, joined Carlton Senior Living as president in 2015. Prior to joining Carlton Senior Living, Coluzzi served as Chief Executive Officer of the Esquire Group, a senior living and apartment company with 1,200 units in seven communities in New Jersey.



## **Heidi Culbertson, Co-Founder and CEO, Marvee**

Heidi Culbertson, co-founder and CEO of Marvee, and finalist in the 2016 Silicon Valley Boomer Summit Competition and AARP's 2017 Innovation@50 LivePitch event.



## **Anne DeGheest, Founder and Managing Director, HealthTech Capital**

Anne DeGheest pioneered the HealthTech or Digital Health space as a healthcare executive, an entrepreneur, angel investor, corporate advisor and mentor capitalist. She is the founder of HealthTech Capital and MedStars.



## **Susan Donley, Publisher and CEO, Stria**

Susan Donley is Publisher and CEO of Stria, a new media platform for the longevity market. Launched in March 2018, Stria (strianews.com) provides information, experiences and content that inspires

cross-sector solutions for our aging society. Previously Ms. Donley served as Publisher and Managing Director of Next Avenue.



## **Erika Feinberg, Interactive Public Speaker, Launch and Turnaround Specialist**

Erika has been CEO of three small businesses and grew all three into multi-million, market-leading and nationally loved brands in the software and medical products markets. Her latest business became one of the highest ranked multi-channel sales resources of cash-pay medical products and devices. The company helped generate billions in revenues for strategic partners and over \$90 million in revenue for the company before she sold it in 2014.



## **Katy Fike, Ph.D., Managing Director, Generator Ventures**

Katy Fike is a founding partner of Generator Ventures, a venture fund focused on the intersection of aging, senior care and technology, and the co-founder of Aging2.0, a global innovation network. Katy is a Ph.D. gerontologist, former investment banker and systems engineer. Recently named one of Fast Company's 100 Most Creative People in Business, Katy is a sought after speaker on topics related to innovation and aging.



## **Ted Fischer, Co-Founder and CEO, Ageless Innovation**

Ted Fischer is Co-Founder and CEO at Ageless Innovation. Ted, and his former Hasbro team, recently completed a collaborative management led spin-out of the Joy for All brand from Hasbro to focus 100% on growing and scaling impact in the older adult market.



## **Jill Ford, Principal, Venture Capitalist, Toyota AI Ventures**

Jill Ford is a Principal at Toyota AI Ventures in the investment team since December 2017. There she is focused on discovering investment opportunities and working closely with its portfolio companies.



## **Nicole Franz, Principal Account Manager, Google**

Nicole Franz is a Principal Account Manager at Google, inc. She has been in the digital marketing space for 11+ years working with clients across Healthcare, CPG and Finance to find their target audience and grow their businesses through digital.



## **Mary Furlong, Mary Furlong & Associates**

Mary is MFA's president/CEO, and an authority on the baby boom generation as they age. She is the executive producer of What's Next Summit.



## **Dan Gebremedhin, Principal, Flare Capital Partners**

Dan is a Principal at Flare Capital Partners, where he sits on the Board of Somatus, a Flare Capital portfolio company. Prior to joining Flare Capital, Dan served as a Medical Director at the Harvard Pilgrim Health Plan, leading Population Health Analytics, Value Based Purchasing, and General

# SPEAKER BIOGRAPHIES

Strategy. Dan is a practicing Internal Medicine Physician on the Faculty of the Massachusetts General Hospital, and has an appointment as an Instructor at Harvard Medical School.



## **Paul Gordon, Partner, Hanson Bridgett LLP**

Paul has represented hundreds of seniors housing and care companies and investors since 1975 and practices exclusively in the area. He is the author of *Seniors' Housing and Care Facilities: Development, Business and Operations*, 3rd edition (Urban Land Institute, 1998)—a 600-page volume with over 1,000 additional pages of business forms on CD-ROM.



## **Jay Grant, Vice President of Marketing, GreatCall**

Jay Grant is the Vice President of Marketing for GreatCall, the leader in connected health for active aging. Jay joined GreatCall in 2015 with the goal of accelerating the digital transition of the customer lifecycle and driving customer growth. Prior to GreatCall, he served as VP Marketing for CBS Sports' digital and mobile presence. He has more than 20 years of agency and consultancy experience managing consumer and B2B marketing for global brands such as Microsoft, McAfee, and Symantec. Jay holds an MBA from The Fuqua School of Business at Duke University.



## **Brigit Hassig, Managing Project Director, Masterpiece Living; President, IntelligentAge LLC**

IntelligentAge LLC is a firm and partner directed to creating lifestyle products and services, training and marketing strategies for those engaging with an older adult market and longevity economy. She is directing an initiative with Masterpiece Living that will create a web-based experience supporting and challenging older adults to live to their potential physically, spiritually, intellectually and socially regardless of their socio-economic status.



## **Oliver Hersch, Chief Executive Officer, Seniors Blue Book**

Oliver Hersch is the Chief Executive Officer of the Seniors Blue Book. The Seniors Blue Book is a complete resource guide for seniors, caregivers and professionals printing 2.73M Guides annually in 27 markets. Oliver has 20+ years of marketing and industry expertise.



## **Paula Hertel, Founder, Senior Living Consult and Co-Founder, Connected Horse**

Paula has 30 years in the senior living industry. She currently is the founder of Senior Living Consult and co-founder of Connected Horse, an equine assisted program for people affected by dementia. Paula is also the co-chair of the California Assisted Living Association (CALA) education committee and is an active board member.



## **Jody Holtzman, Senior Managing Partner, Longevity Venture Advisors LLC**

At Longevity Venture Advisors, Jody works with entrepreneurs, venture investors, public companies, and non-profit

organizations to leverage business and investment opportunities in the \$7.6 trillion Longevity Economy. Jody is a recognized expert, thought leader, frequent public speaker and writer on innovation for products and services relevant to an aging population.



## **John Hopper, Chief Investment Officer, Ziegler Link•Age FUNDS, LP**

John Hopper is the Chief Investment Officer of the Ziegler Link•Age Funds (the "Funds"). The Funds are two private equity funds investing in technology and tech enabled services in the post-acute and aging spaces. The investors in the Funds are primarily providers and other strategic investors in the post-acute and again markets. John has extensive experience in investment management. He received his MBA from the University of Pittsburgh and his J.D. from The Ohio State University.



## **Cynthia Gibson-Horn, Co-Founder, Motion Therapeutics**

Cynthia Gibson-Horn is the Co-Founder of Motion Therapeutics, a company that provides unique technology combined with, balance-enhancing, wearable products for seniors and others that improve balance and quality of life. Motion Therapeutics provides products, education, and training of BalanceWear® Technology.



## **Ulya Ahmed Khan, President and Managing Partner, Wemanage Services**

Ulya Khan is a healthcare and information services executive with 25+ years of national and international experience. Most recently, she was the Chief Operating and Product Officer at Tivity Health, where she managed a P&L of \$550MM and her product portfolio included SilverSneakers. Ulya is now the Phoenix Ambassador for Aging 2.0, working with innovators and entrepreneurs to develop disruptive solutions in the "Healthy Aging" space. She is also a strategic adviser to several venture and PE groups.



## **Paul Kleyman, National Coordinator, Journalist Network on Generations**

Paul Kleyman is National Coordinator of the Journalists Network on Generations, which he co-founded in 1993. He edits its e-newsletter, Generations Beat Online (GBONews.org). Kleyman directed the Elders Newsbeat at New America Media and previously edited the American Society on Aging's *Aging Today*. Among his honors, he was a 2016 PBS Next Avenue "Influencer in Aging."



## **Roseann Lake, Author and Journalist, THE ECONOMIST'S**

Roseann Lake is the author of *Leftover in China: The Women Shaping the World's Next Superpower* (WW Norton). She currently serves as The Economist's Cuba correspondent, but was previously based in Beijing, where she spent time as a television reporter and journalist.



## **Darren Lancaster, Partner, Marketing and eCommerce Strategic Partnerships**

As a marketing and eCommerce strategic partner, Darren's team specializes in building direct-to-consumer relationships that engender trust, loyalty and lifetime value in combination with leveraging the latest social and digital marketing capabilities to cost-effectively acquire new customers. Darren's previous role was CMO and Head of eCommerce at ThinOptics.



## **Richard Lui, News Anchor, MSNBC and NBC News**

Award-winning journalist and anchor Richard Lui is a media content and digital-social storytelling specialist with 30 years of experience in network television, technology, and business. He has also launched six technology brands over three technology cycles, most recently a Silicon Valley artificial intelligence firm in 2016.



## **Rui Ma, Co-Founder, Transformative Technology Academy**

Rui is the co-founder of Transformative Technology Academy, focused on developing tech startups bringing wellbeing and joy to the world. She spent eight years working in China tech and now runs her own podcast, Techbuzz China, on the subject. She is a graduate of UC Berkeley, Tsinghua, INSEAD and UIUC.



## **Jeff Maltz, CEO and Co-Founder, SilverRide**

Jeff Maltz is the Co-Founder and CEO of SilverRide, the internationally recognized and only ride-hailing company (TNC) offering door-through-door assisted ride service to the 38.7% of seniors 65+ who need physical assistance when they travel. SilverRide is growing nationally, and is actively seeking community partners to help bring us to their communities.



## **Erin McInrue Savage, Senior Vice President, Age Wave**

Age Wave's SVP, Erin McInrue Savage, leads acclaimed national newsmaker studies to uncover consumers' preferences, attitudes and challenges regarding longevity. These surveys generated 10 billion media impressions and were featured in 1,500 articles, including the *Wall Street Journal*, *USA Today*, *CNBC* and more. Her training is in gerontology and epidemiology.



## **Aaron K. McPherson, Vice President of Operations, Center for Elders' Independence**

Dr. Aaron K. McPherson is the Vice President of Operations for Center for Elders' Independence. He continues to explore innovative ways to bring new ideas into the aging space with the goal to serve a greater portion of the East Bay's senior population.

# SPEAKER BIOGRAPHIES



**Candiece Milford, Managing Director of Marketing, Rhoda Goldman Plaza**

Candiece is the Managing Director of Marketing, a community designed to meet the physical and cognitive effects of aging through programming and architectural design. Her 10 year experience at a CCRC has informed seminars she gives on Retirement Living Options in the Bay Area, including how to retire at home.



**Michelle Moros, Executive Director, Belmont Village**

Executive Director of Belmont Village Albany, over 20 years, experience working in the field of senior housing. Licensed as an R.C.F.E. Administrator for the past 18 years. Cal State Chico Graduate with a degree in Recreation Administration and Latin American Studies. Michelle is an active member of the Californian Assisted Living Association and Alzheimer's Association.



**Jim Murphy, Vice President of Innovation, UnitedHealthcare**

Jim Murphy is an Innovation leader within UnitedHealthcare's Medicare and Retirement division. Jim has over 20 years of experience in product development and marketing of highly regulated products and services—with a focus on health care solutions for the 50+ population.



**Martin Ng, CIO, Sodexo Global Home Care**

Martin Ng is Chief Information Officer at Sodexo Global Home Care. He provides strategic direction and leadership in technology and innovation within the Home Care business line.



**Donnacha O'Sullivan, Vice President, TT Capital Partners**

Donnacha O'Sullivan is a Vice President at TT Capital Partners (TTCP). He is focused on investing in high-growth healthcare IT and service businesses. Donnacha has a broad experience developing and implementing strategic initiatives alongside management teams.



**Stuart Patterson, CEO, LifePod**

Stuart Patterson is CEO of LifePod Solutions. Stuart has successfully led high-tech ventures in a variety of markets including: virtual assistants, mobile/online/telephony services, and speech recognition/synthesis.



**Kevin Qian, Managing Partner, McDermott Will and Emery Shanghai**

Kevin Qian is a managing partner of McDermott China Office, leveraging more than 20 plus years' experience in PE/VC law to promote cross board investment in the longevity industry.



**Julia Rasooly, CEO and Founder, PuraCath Medical Inc.; Venture Partner, Shikra Limited; and winner of the 2011 SV Business Plan Competition**

Julia is the founder and CEO of PuraCath Medical, a venture backed medical device company spun out of Stanford University and focused on improving efficacy of catheter connection to enhance the quality of life for both patients and healthcare providers. She has over fourteen years of experience in R&D management in medical device and biotech industries.



**Benjamin Reinhardt, Entrepreneur in Residence, Susa Ventures**

Ben is the EIR at Susa Ventures and the founder of Fern—addressing caregiver shortages with technology. Previously, he did deep learning research, product, and computer vision at Magic Leap. He's a robot doctor, medieval historian, and thing-maker by training.



**John P. Reinhart, Managing Director, Innovators Alliance; Co-Founder, Academic Platform**

John P. Reinhart CPA, MBA is a serial entrepreneur that specializes in Longevity Economy innovation. He is a co-founder of CNAOnline, a platform technology company that partners with AHCA to certify licensed caregivers. John has co-founded three aging sector commercialization ventures.



**Frank Rockwood, Co-Founder and President, Rockwood Pacific**

Francesco "Frank" Rockwood is co-founder of Rockwood Pacific, a professional real estate advisory firm serving mission-based organizations committed to advancing wellness and longevity for older adults through better housing and better health care. Services provided include decision support, development services, financial advisory, and real estate transaction services.



**Sheri Rose, CEO and Executive Director, Thrive Center Inc.**

Sheri Rose is the CEO and Executive Director for the Thrive Center. Sheri had a 30 year telecom technology career and now runs the Thrive Center—a non-profit technology innovation center focused on wellness and aging.



**Dr. Allison Sekuler, Managing Director Rotman Research Institute, Sandra A. Rotman Chair in Cognitive Neuroscience; Managing Director, Centre for Aging + Brain Health Innovation; and Vice-President Research, Baycrest Health Sciences**

In Dr. Sekuler's current roles at Baycrest, she leads both the campus-wide research programs in aging, dementia, and brain health and wellness; and the strategic direction of the CABHI as it pursues its mission to accelerate innovative products, services, and best practices to support brain health and healthy aging.



**Sherwin Sheik, President and CEO, CareLinx**

Sherwin Sheik founded CareLinx, a nationwide professional caregiver marketplace, after witnessing his family's struggles with finding and managing care for his sister and uncle. In 2012, CareLinx won the Consumers' Award at the AARP Health Innovation@50+ Live Pitch Competition.



**Peter M. Simonson, President and Board Member, Juvent**

With 20 years of executive experience in sales, marketing, management, product development, engineering, business development, market research and consulting, Mr. Simonson holds a Mechanical Engineering degree from Georgia Tech. He has been awarded five patents for surgical products, with an additional seven patents pending. He is the inventor of the Medtronic's patented unique spinal implant a system, TSRH-3D®, which has sold in excess of \$1 billion in more than 30 countries. Mr. Simonson and the team developing his technology received Medtronic's global Technical-Contributor-of-the-Year award.



**Michael Skaff, Chief Operating Officer, Jewish Senior Living Group**

Michael Skaff is the COO of JSLG. Previously, Michael served as the COO for the Masons of California, which runs state-wide membership programs and long-term and post-acute care, integrated mental health and in-home services around California. Earlier in his career, Michael was the CIO of LesConcierges, and CIO of the venerable San Francisco Symphony. Michael serves as an advisor to technology, media, and venture capital firms.



**Scott Smith, Founder and Partner, Managing Director, Viant Group**

Scott Smith is the founder and Managing Partner of Viant Group, a Managing Director of Viant Capital and a founding member of Viant Green Capital. Mr. Smith also founded Neveric Capital, Viant's predecessor firm, in 1998 and has over twenty-five years of experience in investment banking, corporate law and company operations working primarily with technology, cleantech, media and healthcare companies.



**Sherri Snelling, CEO, Caregiving Club**

Sherri Snelling is founder/CEO of Caregiving Club, a strategic consulting, communications, connections and content company focused on the nation's 65 million family caregivers. She is the author of *A Cast of Caregivers - Celebrity Stories to Help You Prepare to Care* and is a contributing columnist on caregiving for PBS Next Avenue, Forbes.com, Huffington Post, *USA Today* and *Stria News*.



**Paul Stich, Angel Investor and Advisor**

Paul is an investor and advisor to several early stage companies. His career has been focused on building innovative high growth companies within the technology sector. He has built two successful

# SPEAKER BIOGRAPHIES

security companies, Counterpane and Dasient, which were acquired by British Telecom and Twitter. He also teaches Entrepreneurship at Saint Mary's College.



## **Lisa Sullivan, EVP and Director, Technology Sector, Ketchum**

Lisa Sullivan is a seasoned international communications strategist with deep background in bringing innovative and disruptive ideas and technologies to market. Her expertise spans enterprise technology, consumer electronics, mobility, connected home/car, IoT, transportation, wearable tech, marketing tech, health tech, security and startups.



## **Chon Tang, Fund Manager, Skydeck Venture Fund, UC Berkeley**

Chon Tang is the former founding partner of quant hedge fund firm Junzi Capital Engineering, and successful super-angel investor with a love for all things entrepreneurial. He has now proudly launched the Berkeley SkyDeck Fund in support of UC Berkeley's premier accelerator, and looks to help build Berkeley into a global nexus for entrepreneurship.



## **Eric Taub, Contributing Writer, The New York Times**

Eric Taub writes about digital health and technology for *The New York Times* and many other publications. He is also a business consultant, advising companies on new business development, and marketing strategies. His clients include AARP, Audi, Panasonic, and others.



## **Cora M. Tellez, Chief Executive Officer, Sterling Administration and Founder, Amazing Care Network**

Cora is CEO of Sterling Administration, a healthcare administrator based in Oakland; and is Founder of Amazing Care Network, an organization devoted to redefining aging.



## **Sarah Thomas, Executive-in-Residence, Aging2.0; VP of Product, Seismic Holdings, Inc.**

Sarah Thomas is the Genesis Executive-in-Residence at Aging2.0, headquartered in San Francisco, CA. Aging2.0 is a global organization on a mission to accelerate innovation to improve the lives of older adults. Sarah serves in an advisory capacity at Aging2.0 for startups, corporate partners and investors. Sarah is also VP of Product for the Silicon Valley startup, Seismic.



## **Carrie Tice, CEO and Co-Founder, Octavia Wellness**

Carrie Tice is the CEO and Co-Founder of Octavia Wellness, the premier direct-to-consumer cannabis company focused on seniors, the fastest growing and most underserved segment entering the cannabis market. Octavia is dedicated to providing seniors and cannabis beginners with customized education, easy-to-use products, and trustworthy delivery.



## **Howard Tischler, Co-Founder and CEO, Eversafe**

Howard Tischler is the founder and CEO of EverSafe, a technology company focused on enhanced financial monitoring and the prevention of fraud and identity theft in later life. A tool for seniors and the growing number of financial caregivers nationwide, EverSafe was founded after Howard's mother was defrauded and his research revealed no viable solution to this widespread problem.



## **Dan Trigub, Regional Vice President Healthcare, Transit, Education and Government Partnerships, Lyft**

Dan Trigub is Regional Vice President at Lyft. Dan leverages his 10+ years of healthcare, elder care, business, and entrepreneurship to advance Lyft focus in elder mobility and providing better access to healthcare via its platform.



## **Chris Wong, CEO and Co-Founder, LifeSite**

Chris Wong is a veteran entrepreneur and highly-regarded strategist in the enterprise software industry. From business planning to capital investing, he has advised some of Silicon Valley's most successful tech companies, and his leadership credentials include Ooyala, Agile Software, PeopleSoft and his first start-up SkillsVillage.com. Chris is committed to making LifeSite the trusted leader in delivering smart and safe digital solutions.



## **Robert Wray, Rear Admiral USN (ret), CEO, BlueStar SeniorTech**

Rob Wray is CEO of BlueStar SeniorTech. A retired Navy two-star admiral and nuclear engineer, his company provides technology services to help seniors age in their homes.



## **Blake Wu, Principal on the Med Team, NEA**

Blake is a member of NEA's healthcare investment team, where he is focused on opportunities in healthcare services, healthcare IT and biopharmaceuticals. He joined the firm in 2014 and has been involved with investments including Paladina Health, XOC Pharmaceuticals, Bright Health, Collective Health, Radiology Partners, AVEO Pharmaceuticals, etc.



## **Bill Yates, Chief Consumer Officer and CMO, GreatCall**

Bill Yates is Chief Consumer Officer and CMO at GreatCall. Bill has been the driving force behind the company's vision, successfully transitioning the venture-capital funded startup into a leader in connected health for active aging with a strong mobile health and safety product portfolio.



## **Clayton Yeko, Business Development Strategist, CDW Healthcare**

Clayton Yeko is a Senior Care Business Development Strategist at CDW Healthcare. He has nearly seven years of experience building technology solutions for seniors and senior living organizations.



## **Jack York, Co-Founder and President, It's Never 2 Late**

Jack York is the co-founder and president of It's Never 2 Late (iN2L), a company dedicated to helping older adults realize the full benefits of adaptive technology.



## **Grace Zavolock, Performance Marketing Manager, Home Care Assistance**

Grace Zavolock manages growth and performance marketing at Home Care Assistance, a fast-growing senior care service with over 150 locations worldwide. There, Grace is responsible for driving long-term growth, short-term experimentation, and in-quarter results for new client acquisition from paid traffic.



## **Jeff Zimman, Co-Founder and Chairman, Posit Science**

Jeff Zimman is the Co-Founder and Chief Dealmaker of Posit Science, the industry leader in scientifically-proven, brain fitness exercises. More than 100 articles in peer-reviewed journals have shown extensive benefits from using Posit Science exercises and assessments.



# IMMUNITY

CDW Healthcare helps you build a defense against the tech issues that get in the way of providing the best healthcare. Our knowledgeable experts will work with you to understand your needs and challenges and help you find the right technology to power your aging care.

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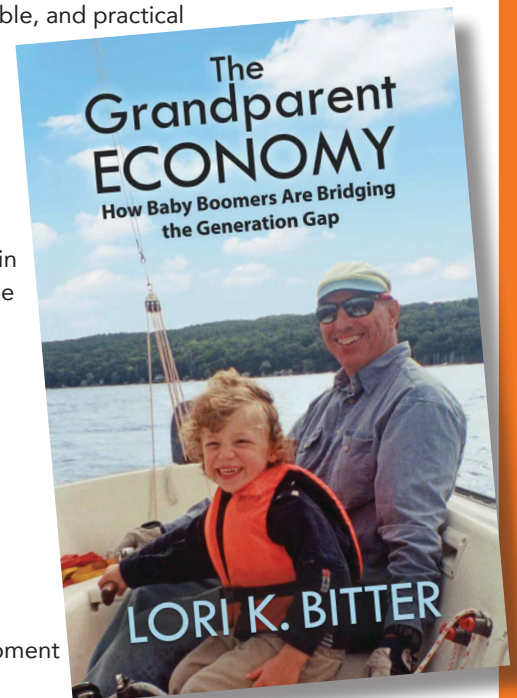
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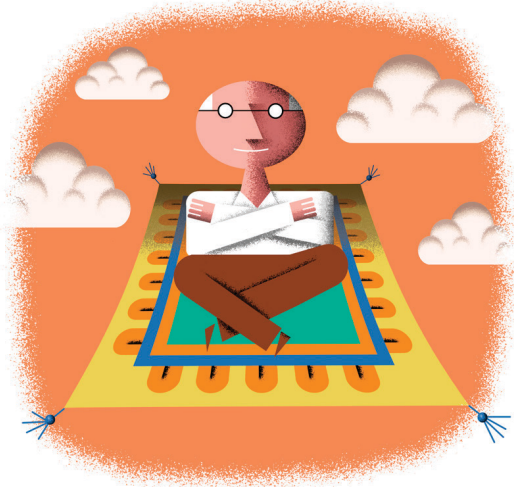
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