



Finance Symposium 2027 Call for Presentations

Purpose: Use this document to draft and save proposal responses before entering them in the Smartsheet submission form. Required fields are marked with an asterisk (*).

Important: This document is a planning template only and does not submit the proposal. Review all responses and transfer them to the online form.

Section 1: Presenter Information

Your Name * (First & Last)

Your Email *

Organization *

LinkedIn Profile * (Enter the complete URL.)

Biography * (Maximum 300 words.)

Qualifications * (Maximum 100 words. Summarize relevant experience, credentials, and prior speaking engagements.)

Past Conference Where Information Was Presented * (Maximum 100 words. Identify prior conferences or events where this information was presented.)

Have You Previously Attended the NVSBC-EF Finance Symposium? *

Yes ☐ No ☐

Have You Previously Presented at the NVSBC-EF Finance Symposium? *

Yes ☐ No ☐

Have You Previously Presented at an NVSBC Event? *

Yes ☐ No ☐



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Section 2: Session Presentation

Submitting to Speak in Manner * (Select the applicable presentation format. If presenting with another presenter or panel, list every co-presenter in Section 3.)

- ☐ Sole Presenter of Session
- ☐ Present with One Other Speaker
- ☐ Panel of Three or More

Attendee Profile * (Identify the attendee experience level that is the best fit for the session.)

- ☐ Start-Up (0-2 Years)
- ☐ Steady State (3-6 Years)
- ☐ Growth (7+ Years)

Attendee Market Alignment * (Indicate whether the session is best suited for commercial sales, government sales, or both.)

Commercial Sales ☐ Government Sales ☐ Both ☐

Training Tracks * (Select one primary track. If the session spans multiple tracks, choose the strongest fit.)

- ☐ Financial Readiness and Capital Access
- ☐ Growth, Scale, and Operational Excellence
- ☐ Strategic Growth, M&A, and Wealth Creation

Title of Session * (A catchy, compelling title of no more than 10 words.)

Full Presentation Description * (Target 200 to 400 words. Explain the presentation, attendee value, and at least one actionable takeaway or resource.)

Session Description for Program * (Target 50 words. Write an informative and engaging program summary that begins with an active, exciting sentence.)

Link to 1-2 Minute Video (Provide an accessible YouTube, Loom, or similar link available to NVSBC-EF and committee reviewers through December 18, 2026. Briefly explain the proposal, audience value, and who will present. The video does not need to be high-tech.)



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Learning Objectives * (List three objectives using action verbs that describe what attendees will learn or be able to do.)

Additional Comments (Do not include names of panelists or other speakers here. Use this space to clarify presentation points or proposed flow.)

Section 3: Panelists / Co-Presenters

If submitting a panel, list all panelists at the time of submission. Complete one block for each additional speaker. Leave unused blocks blank.

Speaker #2

First & Last Name

Email Address

Title & Organization

LinkedIn Profile URL

Biography

Speaker #3

First & Last Name

Email Address

Title & Organization

LinkedIn Profile URL

Biography

Speaker #4

First & Last Name

Email Address

Title & Organization

LinkedIn Profile URL

Biography