

2027 NVSBC-EF FINANCE SYMPOSIUM

Speaker Resource Book

Call for Presentations and Speaker Guidance

Event Day: Wednesday, February 17, 2027 | FUSE Center at George Mason University | 8:30 AM - 3:30 PM

Table of Contents

1. [Overview](#)
2. [Timeline](#)
3. [Guidelines & Best Practices](#)
4. [Training Tracks](#)
5. [Evaluation Criteria](#)
6. [Submission Instructions](#)
7. [Speaker Agreement](#)
8. [Call for Presentations](#)

Overview

The **2027 NVSBC-EF Finance Symposium** is designed to deliver practical financial education, access-to-capital insights, and business growth strategies for Veteran-owned and small businesses professionals. The Symposium will be hosted at the FUSE Center at George Mason University on **Wednesday, February 17, 2027**. This year introduces a structured planning committee and a formal Call for Presentations process to curate a high-impact, relevant, and engaging program.

The program is intended to strengthen financial readiness, improve access to capital, support growth in federal and commercial markets, and connect attendees with credible experts who can provide actionable guidance across all stages of business development.

The primary audience will be **small business executives and finance professionals**, including owners, founders, CEOs, CFOs, controllers, finance managers, and operational leaders responsible for financial decision-making. The Symposium will also attract finance, procurement, supplier diversity, banking, lending, investment, and strategic growth professionals from medium and large businesses who work closely with small business partners and suppliers.

Attendees are expected to represent a broad range of business maturity levels, from emerging businesses focused on establishing financial foundations and accessing capital for the first time to established companies pursuing expansion, strategic partnerships, investment opportunities, succession planning, and mergers and acquisitions. As a result, speakers should strive to provide practical guidance that is relevant, actionable, and adaptable across multiple stages of business growth.

Successful sessions will go beyond theory and provide attendees with tools, frameworks, lessons learned, decision-making considerations, and real-world examples that can be applied immediately within their organizations. Speakers are encouraged to consider how their content supports financial readiness, growth, operational excellence, and long-term value creation for the businesses they serve.

Program Objectives

Objective	What strong sessions should deliver
Financial Readiness	Clear guidance on financial infrastructure, cash flow, accounting, capital planning, risk management, and operational readiness.
Access to Capital	Practical insight into lending pathways, alternative financing, investor perspectives, buyer expectations, and capital strategy.
Market Navigation	Tools for navigating both federal and commercial markets with stronger financial decision-making.
Actionable Learning	Takeaways attendees can apply immediately, including frameworks, case studies, checklists, sample decision points, or lessons learned.

Timeline

Date	Milestone	Speaker Impact
Thursday, October 1 – Wednesday, November 11, 2026	Call for presentations Open	Prospective speakers submit proposals
Monday, November 2, 2026	Registration Opens	N/A
Wednesday, November 18 – Friday, December 18, 2026	Presentation Review	Review of proposals completed
Friday, December 18, 2026	Program Finalized	Selected speakers confirmed
Monday, January 18, 2027	Draft Presentations Due	Speakers submit presentation drafts
Monday, February 8, 2027	Final Presentations Due	Speakers submit final presentations

Guidelines and Best Practices

- Submissions must provide professionally relevant, educational content and must not market a product, person, company, or paid service.
- Sessions should be practical, focused, and directly useful to small business professionals, especially Veteran-owned businesses.
- Panels, case studies, fireside chats, and interactive formats are encouraged when they create stronger learning value than a solo lecture.
- Speakers should be prepared to participate in person on February 17, 2027, at the FUSE Center at George Mason University.
- Submissions should identify all speakers or co-presenters by name, organization, role, and contact information. Do not list generic placeholders such as “representative from a lender.”
- NVSBC-EF does not provide speaker compensation, honoraria, travel reimbursement, or royalties for speakers selected through this process.
- Selected speakers will be expected to meet deadlines for session confirmation, biography, headshot, presentation materials, and final slide submissions.
- Speakers must use NVSBC-EF provided templates and should follow all program, A/V, branding, and handout guidelines.

Training Tracks

NVSBC-EF is seeking session proposals that align with one or more of the following Training Tracks. Topics may be refined with committee input as the CFP launches.

Financial Readiness and Capital Access

Audience: Early-stage and emerging businesses focused on building a strong financial foundation.

Description: This track focuses on helping businesses become financially prepared for growth, lending opportunities, and capital access. Sessions should provide practical guidance that attendees can implement immediately.

Sample Topics:

- Becoming lender ready
- Financial documentation and reporting
- Accounting fundamentals
- Building banking relationships before financing is needed
- Personal and business credit management
- Understanding financing options
- SBA lending programs
- Traditional vs. alternative financing
- Working capital fundamentals
- Financial readiness assessments and checklists

Growth, Scale, and Operational Excellence

Audience: Growing businesses seeking to strengthen internal financial operations and support expansion.

Description: This track focuses on helping business owners scale responsibly by developing the infrastructure, teams, systems, and financial strategies necessary for sustained growth.

Sample Topics:

- Managing rapid growth
- Scaling operations and infrastructure
- Building financial forecasting capabilities
- Cash flow planning during growth

- Strategic partnerships
- Growth capital strategies
- Managing risk during expansion

Strategic Growth, M&A, and Wealth Creation

Audience: Established companies focused on enterprise value, acquisitions, investment readiness, and long-term wealth creation.

Description: This track explores advanced topics related to business valuation, acquisitions, strategic partnerships, investment opportunities, and owner wealth creation.

Sample Topics:

- Mergers and acquisitions
- Preparing a company for acquisition
- Exit planning
- Building enterprise value
- Investor perspectives
- Buyer and lender expectations
- Wealth management for business owners
- Strategic growth planning
- Succession planning
- Corporate partnerships and joint ventures

Evaluation Criteria

Session Content

- *Alignment with theme, training tracks, and audience*
 - Does the session relate to the conference theme and designated focus areas?
 - Is it relevant to small business professionals, especially veteran-owned businesses?
- *Support for Veteran-Owned business growth*
 - Does the presentation proposal directly support growth in federal contracting and/or commercial markets?
- *Practical impact*
 - Will the session help attendees improve their company operations or strategy?
 - Does it provide tangible, actionable strategies attendees can implement immediately?
- *Breadth and relevance*
 - Does the topic resonate with a large percentage of attendees?
 - Are niche topics clearly justified and valuable?
- *Emerging trends*
 - Does the presentation proposal introduce novel approaches or innovative concepts?

Speaker Qualifications

- *Expertise and credibility*
 - Does the speaker demonstrate depth of knowledge and proven experience?
 - Is there evidence of strong delivery and training skills?
 - Will this session be presented as a panel?
 - Has the speaker presented at the Finance Symposium in the past?
- *Clarity and organization*
 - Is the presentation proposal well-written, with clear objectives and learning outcomes?
 - Does the presentation proposal show a logical structure?
- *Audience engagement*
 - Are there plans for Q&A, polls, case studies, or other engagement strategies?

Submission Instructions

- **Session title:** Use ten (10) words or fewer and clearly communicate the session's value.
- **Session description:** Provide a 200- to 400-word description that explains the problem, solution, audience value, and practical takeaway.
- **Promotional summary:** Provide a concise 50-word summary that can be used in marketing materials.
- **Learning outcomes:** List three specific outcomes attendees will be able to understand, decide, or do after the session.
- **Speaker biography & headshot:** Provide a 150- to 300-word biography and current headshot for each presenter.
- **Speaker qualifications:** Explain why each presenter is qualified to speak on the topic, including relevant experience, credentials, or prior speaking engagements.
- **Co-presenters:** Identify all co-presenters by name, organization, title/role, email, and phone number.
- **Presentation skills sample:** Include a short video (1-2 minutes) link demonstrating presentation quality and explaining the basis of the proposal. For panels, include all panelists when possible.

Speaker Agreement Summary

All selected speakers must electronically sign the Finance Symposium Speaker Agreement after their presentation has been selected. Do not submit a presentation if you are unable to sign the agreement.

- Comply with all program-related deadlines, including presentations, handouts, and A/V requests.
- Avoid promotional marketing, selling, or disparaging NVSBC-EF during the presentation.
- Notify the event director, Lauren Masters, at lauren.masters@nvsbc.org immediately if an emergency prevents fulfillment of speaker obligations.
- Use NVSBC-EF templates, logos, and provided guidelines for presentations and handouts.
- Confirm that presentation materials are accurate, lawful, and do not violate proprietary, copyright, trademark, privacy, or other rights.
- Authorize NVSBC-EF to use the speaker's name, likeness, photograph, and biography in connection with program promotion.
- Acknowledge that speakers will not receive royalties, honoraria, reimbursement, or other compensation from NVSBC-EF.

Call for Presentations

The Call for Presentations will be open October 1 - November 11, 2026.

Prospective speakers should:

1. Review this guide in full before beginning the submission form.
2. Draft responses in [this pdf template](#).
3. Copy responses from template into the [online form](#) to manage word count, quality, and spelling.

[CFP Form Link](#)

[Speaker Agreement Link](#)