



Healthcare Impact Investing Summit

Agenda

Healthcare contains a high concentration of impact investing opportunities. However, investing in the sector requires specialized expertise to help source, analyze and support potential investments. For startups, the industry presents unique challenges that can be managed via assistance beyond capital investment.

Opening Remarks: Intro on why healthcare represents a great opportunity for impact investing - *Tobin Arthur, AngelMD*

Healthcare as Impact Investing

Of all sectors, Healthcare contains the highest concentration of impact investing opportunities. Further, it is a space that represents the first dollar spent on all of us and the last dollar spent on all of us. Most startups in the space are looking to generate positive social good whether by improved patient outcomes, a more egalitarian and efficient distribution of care or from reduced costs. Many of these companies are founded by individuals with personal connection to the problems addressed and are truly labors of love.

- 1) **10 minutes:** Investing beyond Dollars for returns beyond dollars -> Company Case studies: Hutchinson, Cubby Beds, Happyr, Risk LD, TQIntelligence, Recalibrate Solutions.
- 2) **20 minutes:** Family Office round table: *Katherine Hill Ritchie*, Nottingham Spirk Family Office, moderator. *Jamie Rhode*, CFA, Verdis Investment Management; *Kevin J. Schimelfenig*, McGeever Family Office
- 3) **5 minutes:** Roundtable Q&A
- 4) **7.5 minutes:** Impact investing in practice: *Jon Underkofler*, Alliance Bernstein.



Investment Beyond Capital

Startups are all at risk for implosion in the capital access cycle known as the “Valley of Death.” Healthcare startups battle an even more complex landscape than some on other verticals. The challenges include regulatory, insurance, distribution, compliance, and intellectual property rights issues. These hurdles often require assistance and investment beyond capital.

- 1) **10 minutes:** Healthcare Startup Challenges: *Unity Stoakes*, Startup Health
- 2) **10 minutes:** Our Shared Success - Re-Framing Health Care Innovation to Improve Outcomes: *Maura Little*, Cambia Grove
- 3) **15 minutes:** Incubator Investor round table: *David Carlebach*, WTCUtah, moderator. 3 Firms that support the companies beyond \$'s (*Mike Phillips*, Intermountain Ventures; *Ben Walker*, Innosphere; *Greg Jungles*, ATDC)
- 4) **5 minutes:** Roundtable Q&A

Investing in Healthcare

Family office investors are uniquely positioned as the top financiers of impact investing. They possess a fully funded capital base, direct investing authority; and often represent the personal interests of the family itself. Unfortunately, while healthcare presents compelling opportunities, it is also a difficult space for investors to properly value and manage. Investors need a way to better source and analyze potential investments.

- 1) **7.5 minutes:** Mistakes Family Offices make in Healthcare Impact Investing: *David Kunz* - Hall Investments
- 2) **7.5 minutes:** Tax optimization/Opportunity zones: *Matthew Van Dyke*, Hall Institute
- 3) **5 minutes:** Picking and Building winners: *Manish Bhandari, MD* – AngelMD
- 4) **20 minutes:** Doctor Investor round table - Perspectives on Innovation Trends: *Mike Schmanske*, AngelMD, moderator. *Greg Brown*, Gordion Capital, *Mark Froimson, MD*, AngelMD, *DJ Verret, MD* AngelMD.
- 5) **5 minutes:** Doctor Investor Roundtable Q&A