



Business Acceleration Summit:

Empowering Connections, Workforce,
and Capital for Sustainable Growth

October 8, 2024

Let's celebrate the transformative impact of HR 5050 at the Business Acceleration Summit hosted by NAWBO Silicon Valley Education Group, sponsored by Bank of America and Merrill Lynch. This event commemorates the anniversary of the Women's Business Ownership Act of 1988. The founding members of NAWBO played a pivotal role in collaborating with Congress to pass this monumental law that revolutionized opportunities for women entrepreneurs. This summit highlights several organizations that have been essential in the role of networking, capital, and retirement planning in driving sustained business success. This is your opportunity to connect, learn, and accelerate your business locally and globally. Don't miss out!

Main Session: Driving Business Forward: Leveraging Connections for Growth and Success

We open the summit with an engaging exploration of how strategic connections drive business growth and success. Industry leaders will offer insights into the pivotal role of technology in accelerating business innovation, with a special contribution from the Technology Incubator at San Jose State University.

This session will also highlight perspectives from the City of San Jose's Office of Economic Development, along with key insights from two distinguished women from the country of Turkey to discuss the WELEAD Project, a groundbreaking initiative launched in 2021 by TÜRKONFED in collaboration with UN Women in the United Nations Entity for Gender Equality and the Empowerment of Women. Together, these experts will provide valuable perspectives on both local and global strategies for fostering growth in today's rapidly evolving business environment.

Moderator:

Karina Dominguez, City of San Jose Office of Economic Development

Panelist:

Gloria Maceiko, Silicon Valley Advantage Accelerator & San Jose State University StartUp Incubator

Panelist:

Professor Yasemin Açıık, TÜRKONFED Turkey

Panelist:

Nazlı Coşkun, İsbank Turkey

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Session 1:

Capital Catalyst: Elevating Business Growth & Financial Mastery

Learn essential financial strategies, including cash flow management, tax strategies, and alternative capital access. Gain insights into Bank of America's initiatives to help secure the financial resources your business needs to grow.

Moderator:

Jennifer Rivera, Bank of America

Panelist:

Wendy Roberts, NorthStar Strategic Partners

Panelist:

Cecy Valencia, Working Solutions

Panelist:

Stephanie Chung, Business Finance Capital

Session 2:

Building Your Workforce: Retirement Planning, Compliance, and Tax Strategies for Business Growth

Focus on workforce resilience through retirement planning and compliance. Explore business retirement planning, the CalSavers program, tax credits, and regulatory requirements to ensure your business stays compliant and supports employee well-being.

Moderator:

Miggie Trevino, Leavitt Pacific Insurance Brokers

Panelist:

Melissa Martin, ADP Retirement Services

Panelist:

Chanda Léger, Workplace Benefits, Bank of America

Panelist:

Lauren Gray, Merrill Lynch Wealth Management

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AGENDA

4:00-4:30 PM

Registration & Networking

4:30-4:35 PM

NAWBO Welcome by sponsors, Jennifer Rivera Velazquez,
Bank of America and Lauren Gray, Merrill

4:35-4:40 PM

Opening Remarks by Griselda Quezada-Chavez,
Chair, NAWBO SV Education Group

4:40-5:15 PM

Main Session: Driving Business Forward:
Leveraging Connections for Growth and Success

5:15-5:50 PM

Session 1: Capital Catalyst:
Elevating Business Growth & Financial Mastery

5:50-6:05 PM

Break

6:05-6:40 PM

Session 2: Building Your Workforce:
Retirement Planning, Compliance, and Tax Strategies for Business Growth

6:40-6:45 PM

Closing Remarks

6:45-8:00 PM

Networking

Main Session: Driving Business Forward: Leveraging Connections for Growth and Success

Moderator

Karina Dominguez is a seasoned expert in developing strategic frameworks that uplift immigrants, underserved communities, and businesses. A graduate of the University of Notre Dame with a degree in Psychology, she has been with San Jose's Office of Economic Development since 2023, leading community outreach and initiatives that support women, small businesses, and entrepreneurs. Karina is dedicated to supporting women facing health challenges like endometriosis and cervical cancer. She believes in the power of sisterhood and is committed to empowering women to take control of their own stories, inspiring others to do the same and create lasting impact for future generations.



Panelist

Gloria Maceiko is the CEO and Founder of Silicon Valley Advantage, a BioTech Accelerator that has created \$1.4 billion in equity value and graduated over 80 startups. With 25+ years of Silicon Valley experience, she has held leadership roles at AT&T and innovative startups. Gloria also serves on multiple boards and co-founded FinnSourcing and DirectNu Energy. She holds degrees in engineering and has been recognized with several industry awards. Fluent in three languages, she mentors women in tech and advises global startups.



Panelist

Prof. Dr. Yasemin Aık, born in Elazığ, is a prominent Turkish entrepreneur and the Chairperson of Women in Business Commission at TURKONFED. She founded Seza Cement in Eastern Anatolia, and established ELİKAD in 2008 to support women entrepreneurs. A professor since 2005, Aık has worked internationally at Nottingham University and is active in numerous NGOs. Recognized among Turkey's top women entrepreneurs by Fast Company and Fortune, she was named one of the "48 Most Influential Women in Turkey" in 2018.



Panelist

Nazlı Coşkun has built a distinguished career at Türkiye İş Bankası A.Ş. since 2004, playing a key role in developing SME banking strategies, AI-driven pricing models, and CRM systems. She currently leads teams within the SME Banking Marketing Department, focusing on innovative solutions for sustainability and digitalization. Nazlı has represented İşbank in initiatives on green transformation, gender equality, and Industry 5.0, while spearheading projects like WeLead, empowering women entrepreneurs, and the Twin Transition Journey for SMEs.





Business Acceleration Summit: Moderators and Panelists

Session 1: Capital Catalyst: Elevating Business Growth & Financial

Moderator

Jennifer Rivera Velazquez has six years of experience in business banking. She supports small businesses in Silicon Valley by helping them access capital and manage finances. Starting as a personal banker at Bank of America, Jennifer now serves as a small business banker in the Silicon Valley market. She is a board member of the NAWBO Silicon Valley Education Group and is involved with the Hispanic Latino Business Council, promoting diversity and fostering partnerships.



Panelist

Wendy Roberts, CPA, is an experienced entrepreneur and financial executive with a BS in Accounting from Indiana University and MBA coursework from the University of Tampa. She excels in corporate finance, strategic leadership, and developing innovative financial strategies to drive client growth and profitability. As a CFO, Wendy specializes in financial systems, risk management, and strategic planning, consistently delivering effective solutions. Her expertise and commitment make her a valuable asset in any corporate environment.



Panelist

Cecy Toro joined Working Solutions in 2022 as Business Development Officer and brings over 15 years of mortgage lending experience to her role. She is a small business owner who is passionate about educating people about finance and helping them get access to affordable capital. Cecy holds a Bachelor of Science degree in Business with a concentration in Communications.



Panelist

Stephanie Chung is Vice President at Business Finance Capital (BFC), a leading Certified Development Company specializing in SBA 504 loans to help small and medium-sized businesses acquire real estate. With 17 years of experience in commercial real estate, Stephanie is the 2024 President of CREW East Bay, a CCIM board member, and a certified SBA underwriter. She holds a degree from UC San Diego and previously worked for a national environmental firm.



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Session 2: Building Your Workforce: Retirement Planning, Compliance, and Tax Strategies for Business Growth

Moderator

Miggie Trevino is an employee benefits producer at Leavitt Pacific Insurance Brokers with over 20 years of experience. She specializes in helping employers design cost-effective health and welfare benefit programs, focusing on self-funded and fully insured models, FSAs, HSAs, and wellness programs. Miggie is known for her consultative approach and dedication to client service, providing expert support in benefits administration and compliance.



Panelist

Melissa Martin is a Retirement Plan Specialist at ADP Retirement Services with over 15 years of experience. She specializes in new plan sales, conversions, and mergers, focusing on business development and retirement strategies. Melissa holds FINRA Series 6 and 63 licenses and is dedicated to transparent pricing, strategic plan design, and ongoing client support.



Panelist

Chanda Léger is the Director and Workplace Benefits Specialist for the Retirement and Personal Wealth Services Division at Bank of America. Since joining the bank in 2012, she has delivered integrated benefit solutions and programs to employers and employees. With over 20 years of experience in financial services, including previous roles at Wells Fargo and Bank of America Merchant Services, Chanda has a strong background in retirement plan services, benefits, and banking.



Panelist

Lauren Mader Gray is a Vice President and Senior Financial Advisor at Merrill Lynch Wealth Management, holding the Certified Plan Fiduciary Advisor and Sports & Entertainment Accredited Wealth Management Advisor designations. She specializes in holistic financial planning, helping business owners and high-net-worth individuals diversify assets and access liquidity in a tax-efficient manner. Lauren primarily assists clients with equity-based compensation, business owners, and women navigating transitions like divorce or retirement.

