



Your Path to Surety Bonds: What Small Businesses Need to Know

May 18, 2017

Hampden Hall @ the Englewood Civic Center
1000 Englewood Pky., 2nd Floor
Englewood, CO 80110

PROGRAM AGENDA

- 8:00 – 8:30am** **Participants Arrive/Registration**
- 8:30 – 8:35am** **Welcoming Remarks and Overview of Program**
David Castillo, Vice Chair, NASBP Small and Emerging Business Committee and Jennifer Vigil, OSG Denver Area Office Director
- 8:35 – 9:05am** **Bonding and Insurance**
Various types and purposes of surety bonds and how small, emerging, and underserved contractors can begin the process of obtaining bonding.
Don Appleby, Holmes Murphy
Michael Lischer, IMA
- 9:05 – 9:15am** **Perspective of a Surety Underwriter**
Bill Barbour, RLI Insurance Company
- 9:15 – 9:45am** **Banking & Finance**
How to obtain a loan and business lines of credit, and establish a working relationship with a banker.
Steve White, SBA Lead Lender Relations Specialist
- 9:45 - 10:15am** **Risk Management and Legal Concerns**
Performance risk, construction law, contracting issues, including change orders and equitable contract price adjustments, and remedies available to contractors involved in legal disputes.
Jay Labe, Allen Curry
- 10:15 - 10:20am** **Break/Mid-morning Networking**

- 10:20 – 10:50am** **Construction Accounting**
Construction accounting principles and financial systems that every small, emerging, and underserved contractor must know and adhere to for successful bonding relationships and business operations.
Bill Tourtillott, CPA, Quest Accounting, Inc.
- 10:50– 11:20am** **Federal Assistance Programs**
SBA Surety Bond and Loan Program staffs will discuss their expertise concerning bond and loan guarantees to assist small, emerging, and underserved contractors.
10:50 am – 11:05 am: *Steve White, SBA Lead Lender Relations Specialist*
11:05 am – 11:20 am: *Tamara Murray, OSG Denver Area Office Marketing Specialist*
- 11:20 – 11:35am** **Small Contractor Success Story**
A local small construction business will provide its story of obtaining financial and surety credit and building its resources network.
Bud Withrow, CoWest Insurance Associates
Keith Lightfield, Lightfield Enterprises, Inc.
- 11:35 – 11:55am** **Local Procurement Opportunities**
The Federal procurement process, as well as ways that a small business can access state, local, and private contracting opportunities.
Kathryn Lobdell, Colorado PTAC Counselor
- 11:55 – 12:00pm** **Concluding Remarks: Wrap-Up/Additional Resources**
Tamara Murray, OSG Denver Area Office Marketing Specialist
- 12:00 – 1:00pm** **Network with a Surety Professional**



U.S. Small Business Administration

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