

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

DATE: Tuesday - June 11, 2019
Location: L.A. Grand Hotel Downtown
333 S Figueroa St
Los Angeles, CA 90071

DRAFT PROGRAM AGENDA

- 8:00 – 8:30am** **Participants Arrive**
Refreshments
- 8:30 – 8:35am** **Welcoming Remarks and Overview of Program**
Welcoming Remarks – *Victor Parker, LA District Office Director*
– 3 minutes
Program Overview – *Catharine Powers, Western Area Director, SBA* – 2 minutes
- 8:35 – 8:45am** **Small Contractor Success Story**
A local small construction business will provide its story of obtaining financial and surety credit and building its resources network.
Mark Rosales, President – American Building Comfort Services, Inc. – Preferred Bonding and Insurance Services, Inc. / 8(a) graduated
- 8:45 – 10:00am** **75 minutes on Bonding and Insurance**
Various types and purposes of surety bonds and how small, emerging, and underserved contractors can begin the process of obtaining bonding. Construction, accounting principles, and financial systems that every small, emerging, and underserved contractor must know and adhere to for successful bonding relationships and business.
Lourdes Landa, BB&T Insurance Services of California, Inc.
- 10:00 – 10:30am** **30 minutes on Banking & Finance**
How to obtain loans and business lines of credit, establish a working relationship with a banker and access SBA loan programs.
Israel Nery, Asst. District Director (Lender Relations) , SBA
- 10:30 - 10:35am** **Break/Mid-morning Networking**
- 10:35 – 11:05am** **30 Minutes on 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.

Colin K. McCarthy, Lanak & Hanna, P.C.

11:05– 11:20am

Federal Assistance Programs

SBA Surety Bond Guarantee Program and other SBA resources available to assist small, emerging and underserved businesses.

Aubrey Lavitoria, Lead Business Opportunity Specialist, SBA and Kevin Valdes, Underwriting Marketing Specialist, SBA

11:20 – 11:50am

Local Procurement Opportunities

The Federal procurement process, as well as ways that a small business can access state, local, and private contracting opportunities.

Enrique Gonzalez, PTAC Program Manager, County of LA Dept. of Consumer and Business Affairs

11:50 – 12:00 pm

Other Resources

12:00 – 12:10 pm

Producer Insights for Success

12:10 – 12:15pm

Concluding Remarks: Wrap-Up/Additional Resources

Kevin Valdes, UMS – SBA

12:15 – 1:00pm

Network with a Surety Professional