

The **SelectUSA Academy** is an optional pre-Summit orientation for participants from companies, state and local governments, and economic development organizations (EDOs) who want to make the most out of the SelectUSA Summit.

The SelectUSA Academy sessions will be presented in two tracks – **Investor** and **EDO** – and will include **concrete information and practical tips** on topics such as regulations and investment incentives, investor visas, and analytical tools to better understand current foreign direct investment (FDI) and reshoring trends.

- The **Investor Track** will be particularly useful for companies of any size that are considering their first investment in the United States.
- The **EDO Track** will focus on specific strategies for attracting FDI, as well as the latest economic development trends and resources.

This orientation will help participants gain **valuable, first-hand insight** from experienced investors, economic developers, and officials into techniques, tools, rules, and resources that can improve your investment strategy.

Following the Academy sessions, there will be a special **networking reception** for participating investors, economic development organizations, and speakers.

INVESTOR TRACK: Sunday, March 22, 2015

2:00 p.m. - 2:30 p.m. WELCOME REMARKS & ACADEMY KEYNOTE ADDRESS

The Honorable Arun Kumar, *Assistant Secretary, Global Markets*
Mr. Hal Sirkin, *Senior Partner & Managing Director, Boston Consulting Group*

2:35 p.m. - 3:35 p.m. The Investment Process From A to Z

Hear from world-class service providers about how to map the investment process, important concepts for structuring and financing an investment, steps to identify a location, important partners and resources to support business location and expansion, and the role of business incentives in investment decisions.

Moderated by Mr. Kevin McKervey, *CPA, President, Clayton & McKervey, P.C*

Mr. Patrick Ferron, *Co-Founder & President, ALTIOS International*
Mr. Elliot Feldman, *Partner, BakerHostetler*

3:35 p.m. - 3:50 p.m. BREAK

3:55 p.m. - 4:25 p.m. What Should International Firms Look for?

Hear from experienced managers from international companies about what they look for when they expand or relocate. How do industry clusters, supply chains, transportation, workforce issues, regulations, and incentives affect their decisions?

Moderated by The Honorable Vinai Thummalapally, *Executive Director, SelectUSA*

Mr. Frank Ervin, *Director of Government Affairs, Magna International Inc.*
Ms. Terry Jennings, *Head of Public Policy, RELEX Group*

**4:30 p.m. - 5:15 p.m. Economic Development Organizations (EDOs):
Your Partners on the Ground**

Economic development organizations (EDOs) at the state and local level offer essential support to firms. This panel will highlight their role in the investment process, the types of resources they can provide, and the questions firms often ask.

Moderated by Mr. Jeff Finkle,
*CEO & President, International
Economic Development Council*

Mr. Jason Hickey, *President, Hickey & Associates*
Mr. Kenny McDonald, *Chief Economic Officer,
Columbus 2020*

Ms. Jan Rogers, *Executive Director, Southern Idaho
Economic Development Organization*

5:15 p.m. - 5:45 p.m. Navigating Investor Visas

The United States offers an unparalleled investment climate for foreign investors of all sizes. With the wide range of business, employment-based, and investor visas available, participants will learn about the primary categories of each program, the steps to apply, and what factors may influence your determination of which type of visa is the right fit for your company. This session will feature experts from the State Department's Bureau of Consular Affairs and the private sector who will speak on the overall visa process.

Ms. Cathy McFarland, *Consular Affairs, United States Department of State*

Mr. John Meyer, *Partner, Foster LLP*

5:45 p.m. - 6:45 p.m. Networking Reception

EDO TRACK: Sunday, March 22, 2015

2:00 p.m. - 2:15 p.m. WELCOME REMARKS & ACADEMY KEYNOTE ADDRESS

The Honorable Vinai Thummalapally, *Executive Director, SelectUSA*

2:15 p.m. - 2:45 p.m. How Global Companies Approach Expansion to the U.S.

Mr. Kapil Sharma, *Vice President, Government and Public Affairs, Wipro*

Mr. Aaron Brickman, *Senior Vice President, Strategy & Development, Organization for International Investment*

The United States might be the leading destination for investment, but why would a company be interested in your specific location? What are companies looking to get out of an economic development organization (EDO)? This lively discussion will feature a foreign multinational's perspective on expansion strategy and tips for how an EDO can best prepare to meet an interested company.

2:50 p.m. - 3:35 p.m. Building, Executing, and Sustaining a Foreign Direct Investment (FDI) Attraction Strategy

Global investment is an essential component of an effective economic development strategy. This panel will examine how to create, manage, and implement a successful investment attraction strategy by building on strengths and opportunities and collaborating regionally.

Moderated by Ms. Rebecca Moudry, *Acting Director, Investment Promotion and Facilitation, SelectUSA*

Mr. Mark O'Connell, *CEO, OCO Global*

Mr. Sam Kaplan, *President of the Trade Development Alliance of Greater Seattle*

Mr. Peter Kaldes, *Executive Director & Head, Global Cities, Global Philanthropy, J.P. Morgan Chase & Co.*

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Mr. John Meyer, *Partner, Foster LLP*

4:30 p.m. - 5:15 p.m. Trends in Reshoring and Foreign Direct Investment

Reshoring, the winning back of manufacturing to the United States, is more than a passing trend. It is a key component in strengthening local economies and the U.S. industrial base. Learn about new analytical tools that are spurring U.S. companies and foreign companies alike to locate their operations close to U.S. consumers. This session will highlight different resources and approaches you can use to make the case for reshoring in your community.

Moderated by Mr. Phillip Singerman, *Associate Director, National Institute of Standards and Technology (NIST)*

Mr. Harry Moser, *Founder, Reshoring Initiative*
Dr. Suzanne de Treville, *Professor of Operations Management, Université de Lausanne*

5:15 p.m. - 5:45 p.m. EB-5: How Does It Fit With FDI Development?

EB-5 has been a hot topic in the development world as a means to raise project funding. This session will address best practices in establishing and engaging with EB-5 regional centers to support economic development objectives. Panelists will also discuss marketing and managing inquiries.

Moderated by Mr. Peter Joseph, *Executive Director, Invest in the USA (IIUSA)*

Ms. Angelique Brunner, *Founder & President, EB5 Capital*
Mr. Brent Raymond, *Director of International Trade, Vermont EB-5 Regional Center*

5:45 p.m. - 6:45 p.m. Networking Reception