

# SMALL BUSINESS SUMMIT

## EXPLORING YOUR GROWTH OPTIONS



May 4-5, 2026

Nashville / JW Marriott Nashville

For more information, please email us at [info@bankdirector.com](mailto:info@bankdirector.com) or call us at **615.777.8465**.

You can also visit our website for agenda updates and to register online at: [smallbusiness-summit.com](http://smallbusiness-summit.com)

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Bank Director and Pinnacle Financial Partners are pleased to invite you to the inaugural Small Business Summit, taking place May 4–5, 2026, at the JW Marriott Hotel in Nashville, Tennessee. This two-day program is designed to equip small business owners and founders with actionable insights and growth strategies that can be applied immediately for both near-term execution and long-term success.

The Summit features expert-led sessions, unparalleled networking and practical tools to implement within your organization. In the agenda that follows you will notice sessions focused on the issues and opportunities shaping small businesses today — from the current state of our economy to in depth balance-sheet reviews — sessions focus on proven strategies for scaling operations and elevating business lines. As part of our programming, breakout sessions allow participants to tailor their experience by delving into critical topics such as selecting the right business structure, leveraging technology and AI effectively and responsibly, mitigating risk, accessing and raising capital, and building strong, high-performing teams.

Whether the priority is streamlining operations, preparing for future market shifts, or expanding into new geographies and segments, the Summit offers resources and connections that support each stage of the entrepreneurial journey. In addition to substantive programming, the event provides multiple opportunities to engage with peers and industry experts, exchange best practices and develop relationships that extend well beyond the conference.

We would be honored to welcome you to Nashville for this important gathering of business leaders and practitioners. To review the current agenda and to register online, please visit [smallbusiness-summit.com](http://smallbusiness-summit.com). If you have any questions or need additional information, please contact us directly at [info@bankdirector.com](mailto:info@bankdirector.com) or 615.777.8465.

Sincerely,



**Michelle King**

CEO | Bank Director

[mking@bankdirector.com](mailto:mking@bankdirector.com)



**Rob McCabe**

Chairman | Pinnacle Financial Partners

[rob.mccabe@pnfp.com](mailto:rob.mccabe@pnfp.com)

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**+ Hear From Industry Leaders**



**+ Collaborate + Share Best Practices With Peers**



**+ Create A Strategic Growth Plan**



**+ Consider New Technology Platforms**



**+ Prepare For Economic Uncertainties**



**+ Build Long-Term Value**



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# Sunday | May 3

5:00 PM – 6:00 PM

## **Welcome To Nashville! Networking Peer & Guest Reception**

Join us at the Pinnacle Tower at Nashville Yards to kick-off the inaugural Small Business Summit! Take time to network with your peers and industry experts as we prepare for the Summit that follows.

**LOCATION:**

**Pinnacle Tower at Nashville Yards  
21 Platform Way South  
Second Floor Amenities Terrace  
Nashville, TN**

Hosted by: **Pinnacle Financial Partners**



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**Monday | May 4**

DAY ONE

**EXPLORING YOUR  
GROWTH OPTIONS**

## CONFERENCE AGENDA

*\*Agenda subject to change*

**7:30 AM – 8:30 AM      Registration & Breakfast**

**8:30 AM – 8:35 AM      Welcome: Small Business Growth**

Michelle King, CEO, Bank Director

Rob McCabe, Chairman, Pinnacle Financial Partners

Small businesses nationwide drive market growth and prosperity within their communities. As this week kicks-off 2026 Small Business Week across the U.S., Pinnacle Financial Partners and Bank Director invite you to Nashville for our inaugural Small Business Summit. Connect with industry experts, discover growth strategies and embrace innovative ideas.

**8:35 AM – 9:15 AM      Economic Update**

Economic headwinds have impacted businesses across the country, from tariffs to the unforeseen impacts of climate events, from the use of artificial intelligence to inventory and supply chain management. During this session, we navigate the current economic landscape and explore trends impacting small businesses. Stay informed and gain the knowledge needed to thrive in a changing market. Prepare your business for an evolving future with actionable takeaways.

**9:15 AM – 9:55 AM      The Cost of Doing Business**

Rick Arthur, EVP, Consumer and Small Business, Pinnacle Financial Partners

Brian Moyer, Founder and Managing Partner, Moyer & Company LLC

Matt Proctor, Small Business Program Manager, Pinnacle Financial Partners

Moderated by: Michelle King, CEO, Bank Director

During this session, we hear from a panel of small business owners as we delve into critical expenses affecting small enterprises. Learn to manage operational costs, optimize budget strategies and boost profitability – all while meeting customer expectations. Gain practical insights to navigate financial challenges and ensure your business's sustainable growth in today's competitive landscape.

**9:55 AM – 10:35 AM      Financial Intelligence**

Join us for an in-depth session on mastering the key financial aspects of your small business. Learn to better manage your balance sheet, understand your financials, enhance your operational efficiencies and optimize your cash flow to drive real results to your top and bottom line.

**10:35 AM – 10:50 AM      Refreshment Break**

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## 10:50 AM – 11:30 AM **Breakout Sessions**

*(Breakout Sessions run concurrently and are not repeated; please select one to attend.)*

### **Breakout I: Business Structure Options**

Navigate the complexities of business structures in our comprehensive session. Understand the differences and benefits of LLCs, Subchapter S Corporations, C-Corps, S-Corps, charters and bylaws. Learn how to choose the right framework for your business needs to ensure optimal legal protection, tax advantages and operational efficiency.

### **Breakout II: Vision & Strategic Planning**

Craft your business's future with clarity and purpose. In this session, learn to define a compelling mission and vision, outline strategic objectives and set long-term goals.

### **Breakout III: Capital Raise – Making the Right Investments & Building Value**

Unlock financial growth in our session on building market value. During this session, we dive into money management strategies, explore insurance benefits and navigate potential M&A opportunities. We also explore effective capital raising techniques and how to enhance your business's liquidity.

## 11:30 AM – 12:30 PM **Networking Lunch**

During this time attendees enjoy a Nashville style lunch with all the southern delights!

## 12:30 PM – 1:10 PM **Utilizing Technology Effectively & Efficiently**

Position your business for success in our tech-driven world. During this engaging session, discover how to leverage technology and AI to boost your business's efficiency. Uncover cutting-edge tools and best practices for integrating technology seamlessly and learn how AI can streamline operations and enhance customer experiences to drive growth.

## 1:10 PM – 1:50 PM **Fraud & Cybersecurity**

Protect your business from emerging threats and learn essential strategies to safeguard your data, detect fraud and implement robust security measures. During this session, we provide information to allow you to stay ahead of cyber risks with expert insights and practical tools, ensuring your business's resilience.

## 2:00 PM – 2:40 PM **Breakout Sessions**

*(Breakout Sessions run concurrently and are not repeated; please select one to attend.)*

### **Breakout I: Providing THE BEST Customer Service**

Jeff Molyneaux, Co-Founder & Executive Producer, Riverside Entertainment LLC

Larry Whisenant, Client Services Group Manager, Pinnacle Financial Partners

Michael Shinn, Co-Founder & COO, The Sanctuary Golf and Social

Moderated by: Courtney Theis, SVP, Financial Advisor, Pinnacle Financial Partners

Elevate your customer service to the highest standard of excellence. Learn key principles for delivering personalized, exceptional experiences that foster loyalty and satisfaction. Gain insights into creating a service culture that exceeds expectations, ensuring your business stands out through its commitment to quality and attention to every customer detail.

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## **Breakout II: Business Systems & Processes**

Transform your business with streamlined systems and processes. This session focuses on optimizing workflows to reduce reliance on the owner, enhancing efficiency and scalability. Learn strategies to delegate effectively, automate tasks and build a self-sustaining operation, empowering your business to thrive independently and ensure long-term success.

## **Breakout III: Contracts & Agreements**

Master the art of crafting and managing essential contracts and agreements. This session covers leases, vendor contracts and agreements with customers and employees. Learn to protect your interests, ensure clarity and foster positive business relationships through well-structured legal documents. Equip your business with the tools needed for sustainable, secure partnerships.

**2:40 PM – 2:55 PM      Refreshment Break**

**2:55 PM – 3:35 PM      Breakout Sessions**

*(Breakout Sessions run concurrently and are not repeated; please select one to attend.)*

## **Breakout I: What Is Your Exit Strategy?**

This session guides you through creating a tailored exit strategy, exploring options like selling, succession planning or mergers. Learn to maximize value, ensure a smooth transition and secure your legacy, empowering your business journey's successful and rewarding next step.

## **Breakout II: Insurance & Risk Mitigation**

Navigate the complexities of business insurance and risk mitigation in this comprehensive session. Explore essential coverages, including General Liability, Professional Liability and Cyber Insurance. Learn to assess your risks effectively and select the right policies to protect your business against unforeseen challenges, ensuring long-term stability and peace of mind.

## **Breakout III: Family-Owned Businesses: The Next Generation**

Prepare your family-owned business for generational success. This session delves into strategies for smooth transitions, fostering leadership in the next generation and balancing tradition with innovation. Learn to create a sustainable legacy, ensuring your business thrives under future family stewardship while preserving core values and familial harmony.

**3:45 PM – 4:25 PM      Time Management & Productivity**

Discover how to achieve more in less time by enhancing your efficiency with proven time management and productivity techniques. During this session, participants discover tools and strategies to prioritize tasks, minimize distractions and optimize workflows.

**4:25 PM – 5:25 PM      Networking Peer & Guest Reception**

As we conclude day one of the Small Business Summit, join fellow business owners and industry leaders to connect and share best practices.

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**Tuesday | May 5**

**DAY TWO**

**DEVELOPING  
YOUR SHORT-  
AND LONG-TERM  
STRATEGY**

## CONFERENCE AGENDA

*\*Agenda subject to change*

**7:30 AM – 8:30 AM      Registration & Breakfast**

**8:30 AM – 8:35 AM      Day Two Welcome: Thinking Beyond Your Market**

Michelle King, CEO, Bank Director

As we kick off day two of the Small Business Summit, we share inspiring ideas for the audience to consider as they think about growth beyond their current markets.

**8:35 AM – 9:50 AM      General Session: Daymond John's 5 Shark Points:  
Fundamentals for Success in Business and Life**

Daymond John, The People's Shark

Daymond John has been a phenomenally successful business person for over 25 years. Along his entrepreneurial journey, through his many successes as well as failures, he has learned about getting the best out of business and life. He believes the keys to his success include establishing the right mindset and following a few fundamental principles, which he calls his five "S.H.A.R.K points."

Get ready! Daymond John is going to share his unique goal-setting and achievement strategies, which will empower audience members to make positive changes in every aspect of their lives.

**10:00 AM – 10:40 AM      Breakout Sessions**

*(Breakout Sessions run concurrently and are not repeated; please select one to attend.)*

### **Breakout I: Scaling and Growth Planning**

Unlock your business's potential as we explore strategies for sustainable expansion, from market analysis to resource optimization. Learn to set realistic growth targets, leverage technology and build scalable systems, ensuring your small business is prepared for successful and manageable growth in a competitive landscape.

### **Breakout II: Accounting Need-to-Knows**

Demystify essential accounting principles for small business owners. During this session, we cover key components of financial statements, cash flow management and tax basics. Gain the confidence to make informed financial decisions and strengthen your business's financial foundation.

### **Breakout III: Loans & Financing**

Tim McAuley, SVP and Small Business Lending Manager, Pinnacle Financial Partners

Hear from Pinnacle as they share best practices on how to secure loans, grants and build strong business credit. Learn strategies for managing debt wisely, enhancing financial stability and fueling growth. Equip your business with the knowledge to navigate financial resources effectively for sustained success.

**10:40 AM – 10:55 AM      Refreshment Break**

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**10:55 AM – 11:35 AM**

### **Mental Health & Work Life Balance**

Learn strategies to prevent burnout, manage stress and maintain healthy relationships. Discover practical approaches to balancing professional and personal demands, ensuring a fulfilling, harmonious life for success and happiness.

**11:35 AM – 12:15 PM**

### **Building A Strong Team**

**Kyle Chowning**, President, ROOTs Academy LLC

**Matthew Svoboda**, Founder, CFPO Consulting LLC

**Terry Turner**, CEO, Pinnacle Financial Partners

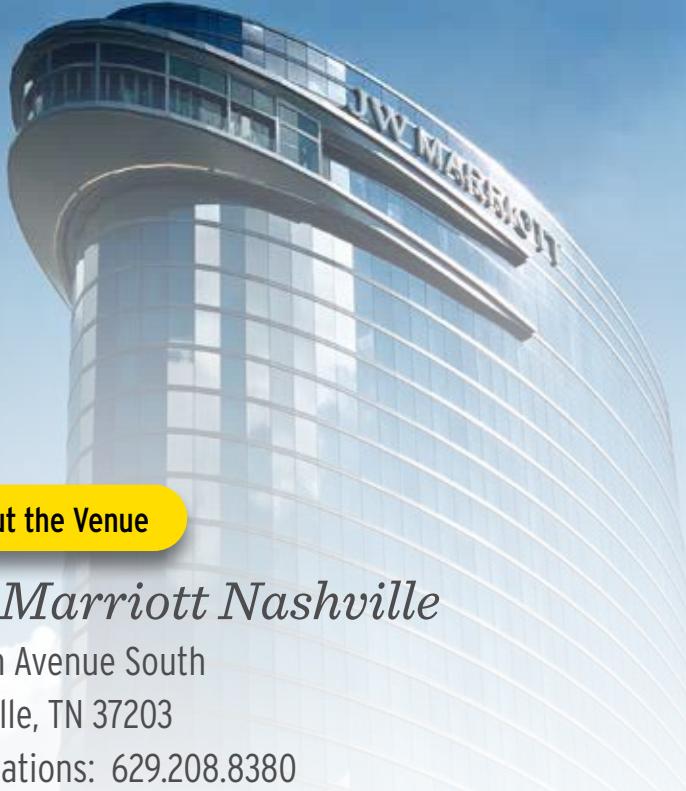
Moderated by: **Michelle King**, CEO, Bank Director

Explore strategies for nurturing talent, fostering a positive culture and optimizing organizational structure. Learn how to inspire leadership at all levels, leading to a cohesive and high-performing team poised for success and innovation in your business.

**12:15 PM – 12:20 PM**

### **Closing Remarks**

**Whether the priority is streamlining operations, preparing for future market shifts, or expanding into new geographies and segments, the Summit offers resources and connections that support each stage of the entrepreneurial journey.**



### About the Venue

## *JW Marriott Nashville*

201 8th Avenue South

Nashville, TN 37203

Reservations: 629.208.8380

The JW Marriott Nashville embodies the energy and eclectic spirit of downtown Nashville. Slip inside the soaring 33-story glass tower and discover a whole new way to experience the city. Peruse a contemporary art collection that pays homage to the capital city's musical heritage, savor prime ribeyes at Bourbon Steak by Michael Mina, and unwind in Nashville's most luxurious guest rooms. Inside and out, it just flows.

### **Discounted Hotel Rate**

There is a discounted hotel room rate available for conference attendees at the JW Marriott Nashville until Friday, April 3, 2026 or until all rooms are reserved. To reserve a room, please contact the hotel directly at 629.208.8380 and mention "Bank Director" to receive the discounted rate of \$339/night for a standard room. Rooms are limited, so please book early! For more information regarding registration, refunds, concerns and/or program cancellation policies, please contact us at 615.777.8465 or [info@bankdirector.com](mailto:info@bankdirector.com).

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## Frequently Asked Questions

### **Who should attend the Small Business Summit?**

The Small Business Summit was created specifically for CEOs, founders, owners and entrepreneurs of small businesses across the U.S. Those responsible for the operations and growth of the business are also encouraged to attend. From private, family owned companies to public companies, this event agenda was designed for all business types.

### **Why should I attend the Small Business Summit?**

The Small Business Summit brings together unparalleled insight from leading experts in accounting, finance, legal, risk management, technology and strategic planning to provide participants with both the foundational knowledge and the latest information on best practices as business owners look to grow in today's economic environment.

Whether you're seeking to streamline operations, prepare for the future, or expand into new markets, this event offers the resources and connections to support your journey. From economic updates and financial balance sheet reviews to scaling strategies, customer service excellence and succession planning, the agenda is packed with value-driven content tailored specifically for business owners and entrepreneurs alike. Breakout sessions delve into critical topics like business structures, leveraging technology and AI, risk mitigation, capital raising, and building strong teams.

### **How much does it cost to attend the Small Business Summit and what does the fee cover?**

The standard individual registration rate is \$495; however, attendees should contact our conference department at 615.777.8465 or visit us online at [smallbusiness-summit.com](http://smallbusiness-summit.com) for special early and group rates. This fee includes all conference activities, materials and meals at the event site. It does not include travel or hotel accommodations.

### **What if I need to cancel my in-person registration at the conference?**

Due to commitments and expenses, all cancellations after April 10, 2026 will be subject to a \$150 processing fee. We regret that no refunds will be given after April 20, 2026; however, substitute participants are welcomed. DirectorCorps, Inc. assumes no liability for any nonrefundable travel, hotel or related expenses incurred by registrants.

For more refund information, to register, concerns and/or program cancellation policies, please email [info@bankdirector.com](mailto:info@bankdirector.com) or call our events department at 615.777.8465.

### **Can I bring a guest?**

Yes, we do have a guest program. The guest rate of \$100 covers all evening receptions. Guests are not allowed to attend sessions. A guest is a spouse, significant other or friend who is not employed by the business represented at the Summit. A co-worker (even a spouse co-worker) or an associate within the business is not considered a guest.

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## Rates & Registration

**Early Individual Rate: \$395** (Expires January 9, 2026)

**Standard Individual Rate: \$495**

**Standard Group Rate: \$395** (For groups of 3 or more from the same business.)

The rate includes all conference activities, materials, meals and beverages at the event site.

The price does not include travel or hotel accommodations.

## Payments & Cancellation

Conference registration fees include admittance to all conference activities and access to the conference materials. Payment will be accepted by check, American Express, Visa, MasterCard or Discover. If paying by credit card, you can register online at the website listed above, email us at [info@bankdirector.com](mailto:info@bankdirector.com) or call us directly at 615.777.8465. If paying by check, please make payable to DirectorCorps, Inc. and include the attendee's name(s) and/or a copy of the registration form and mail to:

Conferences  
Bank Director  
201 Summit View Drive, Suite 250  
Brentwood, TN 37027

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