

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 or call us at **615.777.8465**.
- + Visit our website for agenda updates and to register online at: smallbusiness-summit.com

JOIN US IN NASHVILLE!

For the founders, entrepreneurs and CEOs of small businesses, the difference between stagnation and scale is rarely a lack of effort – it is a lack of strategic leverage. In an economic landscape defined by rapid technological shifts, fluctuating markets, and evolving labor dynamics, the modern business owner requires more than just passion; they require a masterclass in financial intelligence and operational efficiency.

The 2026 Small Business Summit brings together the financial expertise of Pinnacle Financial Partners and the governance leadership of *Bank Director* magazine. This is not a passive conference. It is a high-impact curriculum designed to equip entrepreneurs with the tools to secure capital, integrate artificial intelligence, protect their valuation and build a legacy.



- 
- A photograph of the Nashville skyline, featuring the prominent AT&T Building (Ryman Tower) in the center. The city is reflected in the water in the foreground. The image is overlaid with a blue gradient and a yellow circular graphic at the bottom left.
- + **Master the “Shark” Mindset: Strategic Vision**
 - + **Financial Intelligence: Capital, Cash Flow & Liquidity**
 - + **Future-Proofing Operations: AI & Technology**
 - + **Protecting the Asset: Risk, Legal & Cyber**
 - + **The Founder’s Life: Building A Strong Team**

The Network Effect

Beyond the curriculum, the Small Business Summit offers a curated environment for peer networking. Through the receptions and industry-specific breakout sessions, participants connect with fellow business owners facing the same hurdles. This is your opportunity to benchmark your growth, validate your struggles and find new partners in the vibrant economic hub of Nashville.

Pinnacle + BankDirector.
FINANCIAL PARTNERS

SMALL BUSINESS SUMMIT

EXPLORING YOUR GROWTH OPTIONS



For more information

please email us at 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

Sunday | May 3

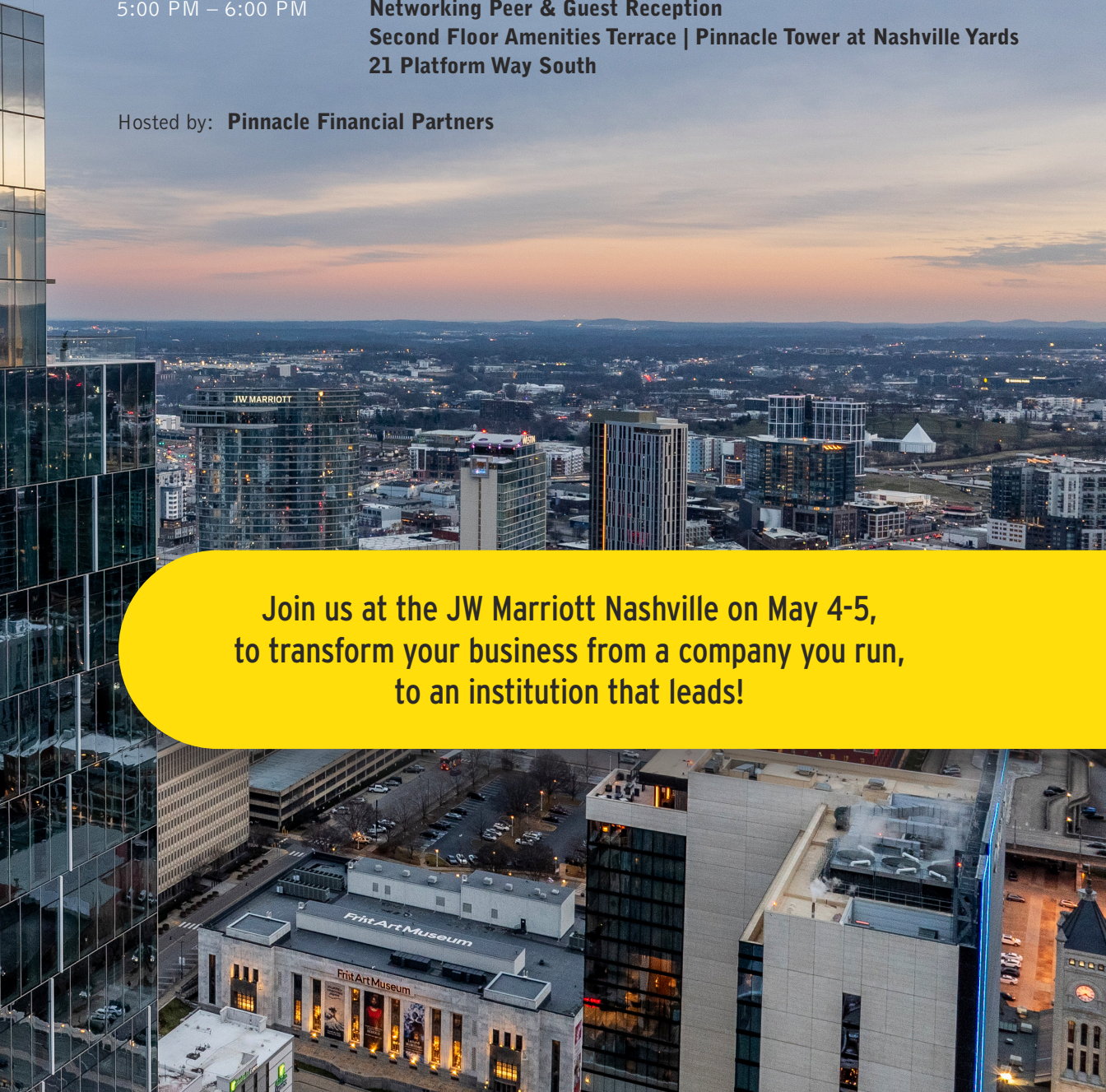
5:00 PM – 6:00 PM

Networking Peer & Guest Reception

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

Hosted by: **Pinnacle Financial Partners**

Join us at the JW Marriott Nashville on May 4-5,
to transform your business from a company you run,
to an institution that leads!



Pinnacle + BankDirector.
FINANCIAL PARTNERS

SMALL BUSINESS SUMMIT

EXPLORING YOUR GROWTH OPTIONS



For more information

please email us at 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

Monday | May 4

1
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, Chief Banking Officer & Vice Chairman of the Board, 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**

Peter Hansen, Director, Research and Policy Analysis, NFIB

Economic headwinds have impacted businesses across the country, from tariffs and the unforeseen impacts of climate events to the use of artificial intelligence and 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**

Bonnie Horton, Owner and Operator, Drybar

Tiny Irwin, Proprietor, Southern Whiskey Society

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

Matt Proctor, Small Business Program Manager, Pinnacle Financial Partners

Moderated by: Rick Arthur, EVP, Consumer and Small Business, Pinnacle Financial Partners

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**

Christine Lapps, Deputy Commissioner, Tennessee Department of Revenue

Speaker To Be Announced, CLA

Moderated by: Michelle King, CEO, Bank Director

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**

For more information

please email us at 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

10:50 AM - 11:30 AM **Breakout Sessions**

Breakout sessions run concurrently, participants select one of three sessions to attend.

Breakout I: Business Structure Options

Van East, Partner, Bradley Arant Boult Cummings LLP

Nathan Harris, Partner, Bradley Arant Boult Cummings LLP

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

Speaker To Be Announced

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

Speaker To Be Announced

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**

Sponsored by: **Bank Director**

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

Cory Kronheim, CEO, SM Advisors

Speaker To Be Announced, CLA

Moderated by: Michelle King, CEO, Bank Director

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**

Speaker To Be Announced

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 expert insights and practical tools to help you stay ahead of cyber risks, ensuring your business's resilience.

2:00 PM - 2:40 PM

Breakout Sessions

Breakout sessions run concurrently, participants select one of three sessions to attend.

Breakout I: Providing THE BEST Customer Service

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

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

Larry Whisenant, Client Services Group Manager, Pinnacle Financial Partners

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.

Breakout II: How To Prepare for an Audit

John Ricketts, Tax Audit Manager, Tennessee Department of Revenue

Michael Ward, Tax Auditor Supervisor, Tennessee Department of Revenue

Join tax auditors as they share need-to-knows and what to expect should your business be selected for an audit by the Department of Revenue.

Breakout III: Contracts & Agreements

Ann Cargile, Partner, Bradley Arant Boult Cummings LLP

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

Navigate the current economic landscape and explore trends. Prepare your business for an evolving future with actionable takeaways.

For more information

please email us at 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

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

Breakout sessions run concurrently, participants select one of three sessions to attend.

Breakout I: Developing AI Use Cases for Your Business

Cory Kronheim, CEO, SM Advisors

During this session, SM Advisors demonstrates how businesses can apply AI to unlock operational efficiencies and strategic growth. This interactive session explores practical, low-risk use cases with widely available, cost-effective tools. We'll collaboratively design new, audience-driven use cases for those in the room – showing leaders how to move from abstract AI concepts to concrete, value-creating initiatives.

Breakout II: Retail Accountability Program

Jeremy Baker, Tax Audit Supervisor, Tennessee Department of Revenue

Evgheni Cuzmin, Tax Audit Manager, Tennessee Department of Revenue

In an effort to ensure a level playing field, the Department of Revenue is constantly monitoring sales tax collected and remitted from all businesses. During this session, we discuss the importance and purpose of the Retail Accountability Program.

Breakout III: Family-Owned Businesses: The Next Generation

Speaker To Be Announced

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 **Data & Market Intelligence**

Martin Wise, Founder/CEO, RelPro

Discover how to leverage data and market intelligence to identify new opportunities, understand your competition and make informed business decisions. During this session, RelPro demonstrates practical approaches to gathering and analyzing market data, helping you target the right prospects, expand strategically and stay ahead in an increasingly competitive landscape.

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.

Pinnacle + BankDirector.
FINANCIAL PARTNERS

SMALL BUSINESS SUMMIT

EXPLORING YOUR GROWTH OPTIONS



For more information

please email us at 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

Tuesday | May 5

2
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**

John Michael Alday, Director of Business Development, 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

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, participants select one of three sessions to attend.

Breakout I: Scaling and Growth Planning

Speaker To Be Announced

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

Speaker To Be Announced, CLA

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.

For more information

please email us at 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

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

10:55 AM - 11:35 AM Beyond Work-Life Balance

Roger Johnson, Founder, Head of Consulting, Vivero Leadership

Work-life balance is a moving target you will never hit, and it's a distraction from the real issue: misalignment. Stop aiming for the "perfect balance" and start aiming for optimal impact. Learn how to locate your Leadership Sweet Spot and introduce a system that turns blind spots into competitive advantages.

11:35 AM - 12:15 PM Building A Strong Team

Kyle Chowning, President, ROOTs Academy LLC

Matthew Svoboda, Founder, CFPO Consulting LLC

Terry Turner, Chairman of the Board, 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

Michelle King, CEO, Bank Director

**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.

For more information

please email us at 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

Thank You to our Sponsors!



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 info@bankdirector.com or 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 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.

For more information

please email us at 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

Rates & Registration

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 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

NAME

NAME FOR BADGE

COMPANY

TITLE

EMAIL ADDRESS

PHONE NUMBER

MAILING ADDRESS

CITY

STATE

ZIP

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 information regarding registration, refunds, concerns and/or program cancellation policies, please contact us at 615.777.8465 or info@bankdirector.com.

Register Today!

For more information and to register, please visit us at smallbusiness-summit.com, call us at 615.777.8465 or email us at info@bankdirector.com.