



SME FINANCE  
FORUM

# IMMERSION PROGRAM 2020



## WELLS FARGO

January 22nd

The SME Finance Forum invites you to take part in an upcoming immersion program hosted by WELLS FARGO, in San Francisco, California, United States. Wells Fargo has been a leader in most of the US SME financing league tables, developing numerous innovations using data to drive new products and customer delivery channels. Wells Fargo calls itself “America’s leading small business lender”, and they’ve been particularly innovative in the unsecured business credit markets – thanks to their data edge. During the program, participants will learn how Wells Fargo learned to partner with fintech to offer valuable services for SME clients.



**Location:** Wells Fargo Conference Center  
**Date:** January 22<sup>nd</sup>, 2019  
**Time:** 8:00 – 17:00  
**Address:** 333 Market Annex Bldg.: 2nd Floor, San Francisco, CA, 94105

# AGENDA

08:00-11:00	Wells Fargo Small Business Lending Overview	Marc Bernstein and Xiao Bing – Wells Fargo
11:00-12:00	Small Business Risk Management	Senior risk manager (TBD)
12:00-13:00	<i>Lunch Break</i>	Location TBD
13:00-17:00	Fintech Presentation Size Up: Small Business Banking- New Customer Demands and Digital Expectations	Anatalio Ubalde, CEO & Founder, SizeUp

## Additional information

For additional information, please send an email to [Tarun Srdihar](mailto:Tarun.Srdihar).

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## About SIZE UP

[SizeUp](#) helps banks better serve their small business customers. It empowers banks to help their SME customers succeed, increase engagement with SME customers, introduce banking products/services to SMEs at strategic decision-making moments in the business' lifecycle, increase acquisition of new customers, and retain existing customers. SizeUp is big data for small businesses. It provides business intelligence and market research to SME companies so they can make smarter decisions through data. SizeUp is licensed by large enterprises/organizations (such as banks) as a value-added service differentiator given to help their business customers succeed and grow. SizeUp currently provides competitive benchmarks; find customers, suppliers, and competitors; and best locations to advertise.

## Presentation Topics

1. Small businesses want more than banking
2. What small businesses want from their banks
3. Interactive case study- Wells Fargo SizeUp

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Social Media hashtag: #SMEFFStudyVisit #smefinance

Twitter: @SMEFinanceForum

# Visit to fintechs: VEEM - KOUNTABLE

January 23th

**Veem** is a global payments network trusted by over 150,000 small businesses around the world. We let businesses pay their vendors, suppliers and contractors anytime, anywhere with our easy-to-use service. Using our proprietary multi-rail technology, businesses can send or receive money in a click, track their payments end-to-end, and even connect to their favorite accounting software – Quickbooks, Xero, or NetSuite.

## Agenda:

- \* Intros
- \* Global Payments Digital Transformation
- \* Veem and Network Payments
- \* Demonstration
- \* Q&A

**Kountable** is a global trade and technology platform that delivers trust, transparency and auditability with data driven insights and real-time information from transactions where small and medium sized enterprises (SMEs) work with enterprise level suppliers and buyers. It facilitates business between qualified SMEs and multinational suppliers in order to efficiently complete large-scale projects for governments, NGOs and corporates. Launched in 2015, Kountable's global presence currently includes offices in San Francisco, Nairobi, Kigali and The Hague.

[Read more>](#)



**Location:** San Francisco, California  
**Date:** January 24th, 2019  
**Time:** 10:00 – 10:45  
**Address:** 345 Broadway San Francisco, CA 94133  
**Contact:** Shaveta Sharma  
shaveta.sharma@veem.com



**Location:** San Francisco, California  
**Date:** January 24th, 2019  
**Time:** 11:15am – 02:30pm (TBC)  
**Address:** 321 Pacific Ave, San Francisco, CA 94111