

CEO

Edison
VENTURES

SUM

MIT

MAY 11 - 12, 2011 | THE BORGATA HOTEL & CASINO | ATLANTIC CITY, NJ

Edison Ventures has the vision to see your dream and the imagination to maximize its potential. Forget about achieving goals....

Instead, surpass them.

AGENDA HIGHLIGHTS

DAY 1: WEDNESDAY, MAY 11

- 11:00 AM Arrival/Registration
- 12:00 PM Lunch
- 12:30 PM Welcome Remarks from Edison
- 12:45 PM Seminar: Blueprint to Hyper Growth
- 1:30 PM Panel: Ingredients for Success
- 2:15 PM 7 Essentials Scorecard
- 2:30 PM Speed Gambling: "Good strategy, good fortune or both?"
- 3:45 PM Break
- 4:15 PM Seminar: Accelerating Integration in M&A
- 5:00 PM Panel: Acquisition Case Studies
- 5:45 PM Cocktail Hour/Wine Tasting
- 6:45 PM Awards
- 7:00 PM Dinner
- 8:30 PM Evening Entertainment

DAY 2: THURSDAY, MAY 12

- 7:30 AM Breakfast: Facilitated Networking by Industry
- 8:30 AM Edison's Best Practices on Strategic Planning
- 8:50 AM Case Discussion: Strategic Decision Making: A Practical Approach
- 9:45 AM Break
- 10:15 AM Seminar: Disciplined Dreaming
- 10:45 AM Team Activity: Exercise on Innovation
- 11:30 AM Debrief
- 11:45 AM Lunch, Edison Closing Comments
- 12:30 PM Ground Transport to Golf
- 1:45 PM Golf Outing (Atlantic City Country Club)
- 5:45 PM Cocktails & Hors D'oevres
- 6:30 PM Departure

DAY ONE:

WEDNESDAY, MAY 11

11:00 AM Arrival/Registration

12:00 PM Lunch

12:30 PM Welcome Remarks

12:45 PM **Seminar: Blueprint to Hyper Growth**

Facilitated by David Thomson, Author Blueprint to a Billion
Blueprint to a Billion approach provides the first quantitative assessment of the success patterns common across a distinct group of 387 fastest growing companies in America. The book identifies 7 essential patterns among these companies which can help shape business model, organization and team to produce exponential growth.

1:30 PM **Panel: Ingredients for Success**

Moderator: David Thomson
Jim Foster, The Neat Company
Glenn Stevens, Gain Capital
Jim Walker, Octagon Research
Ted Werth, PlumChoice

2:15 PM **7 Essentials Scorecard** and Wrap-up

2:30 PM **Speed Gambling: "Good strategy, good fortune or both?"**
Players staked by Edison, grand prize awarded to winner.

3:45 PM Break

4:15 PM **Seminar: Accelerating Integration in M&A**

Facilitated by Mark Feldman, Author Five Frogs on a Log
Most mergers and acquisitions fail because those responsible are not decisive enough to integrate distinct entities. Feldman will walk through his trademarked technique "The Accelerated Transition" to focus on optimizing performance and shareholder value.

5:00 PM **Panel: Acquisition Case Studies**

Moderator: Mark Feldman
Dan Hoffman, M5
Mike Leo, Operative
Al Subbloie, Tangoe
Brian Twibell, Redvision

5:45 PM Cocktail Hour/Wine Tasting

6:45 PM Awards

7:00 PM Dinner served

8:30 PM Entertainment/Open

BLUEPRINT TO HYPER GROWTH



David G. Thomson
Author, [Blueprint to a Billion](#)

David is the Founder and Chairman of The Blueprint Growth Institute, a specialized management-consulting firm focused on helping companies develop growth strategies and execute the 7 Essentials. His insights that identified the quantitative success pattern of America's highest growth companies—which he wrote about in his best-seller *Blueprint to a Billion* and *Mastering the 7 Essentials of High-Growth Companies*. Thomson's Blueprint and 7 Essentials have been featured in media globally from Investor's Business Daily to the Korean Economic Times. Thomson is best known by management teams for his 7 Essentials Scorecard and Workshops to help companies grow.

Thomson has been studying and leading business growth for twenty years in general management and executive sales/marketing at Nortel Networks and Hewlett-Packard and as an Associate Principal during his five years at McKinsey & Company. Thomson graduated with an electrical engineering degree from the University of Waterloo and an MBA from the University of Western Ontario. Thomson is applying the Blueprint as the Managing Director of Blueprint Growth Investors, LLC and the CEO of a new software startup ActivDox. Visit www.blueprintgrowth.com for more information.

PANEL: INGREDIENTS FOR SUCCESS

Jim Foster
*CEO & Director
[The Neat Company](#)*

As CEO, Jim oversees corporate strategy and manages all operating functions of the company including finance, technology, marketing, sales and administration. Jim has over thirty years of experience in computer application software and services, specializing in technology, sales, marketing, and the management of computer software organizations.

Prior to joining The Neat Company Jim was a senior executive at several successful software companies. In 2000, Jim was named Sage Software's Chief Technology Officer for North America operations after spending six years leading their mid-market division. While in that role, he

coordinated six company acquisitions and participated in one of the largest mergers in the mid-market accounting software industry.

Prior to its acquisition by Sage Software, Jim was responsible for Product Strategy and Technology at Best Software, where he lead a team that created one of the first robust web-based applications for payroll and human resource processing.

Before joining Best Software in 1992, Mr. Foster held several sales and technology management positions with firms such as Dun and Bradstreet Software, Computer Science Corporation, and CompuServe.

Jim also serves on the Board of NJ-based CheckPoint HR, an Edison portfolio company.



PANEL: INGREDIENTS FOR SUCCESS



Glenn Stevens

*Co-founder, CEO & Director
GAIN Capital*

Glen is a financial industry veteran with more than 25 years trading and foreign exchange (FX) experience at some of Wall Street's most prestigious financial institutions.

Mr. Stevens drives the strategic goals of the company and oversees all of its business units. He joined GAIN Capital in February 2000 as a founding partner and managing director, and assumed the CEO role in June 2007. In addition to his corporate responsibilities, Mr. Stevens is an active leader in the retail forex industry. He serves on the National Futures Association's FX Advisory Committee and is a founding member of the Foreign Exchange Dealer's Coalition (FXDC).

Previously, Mr. Stevens was managing director, head of North American sales and trading at Natwest Bank.

In this role, Mr. Stevens directly managed a staff of more than 50 trading and sales professionals and also served as a senior member of Natwest's North American Management Committee. From 1990 to 1997, Mr. Stevens was at Merrill Lynch and Co., where he was hired as a USD/JPY trader and was eventually promoted to managing director and chief dealer for spot and forward FX. While at Merrill Lynch, Mr. Stevens developed the investment bank's emerging markets currency trading desk and increased profitability threefold in two years. During this time, he also served as the Federal Reserve Bank's FX representative for investment banks. Mr. Stevens' Wall Street career began in 1984 at Bankers Trust Company.

He is a sought after FX market commentator and spokesperson for the retail FX industry, frequently appearing in financial news outlets. Mr. Stevens holds a B.S. in finance from Bucknell University and an MBA in finance from Columbia University.

PANEL: INGREDIENTS FOR SUCCESS

Jim Walker

*Founder, CEO & Director
Octagon Research Solutions*

Jim Walker built Octagon into software and services leader for FDA submission. Octagon achieved run rate of \$80M bookings and \$50M revenue.

Jim has been working in the pharmaceutical industry for 17 years. Prior to founding Octagon, he worked as the Senior Manager of Worldwide Regulatory Affairs for the Schering-Plough Corporation. Jim worked across multiple therapeutic areas in the Regulatory Affairs and Clinical

Quality Assurance at R.W. Johnson Pharmaceutical Research Institute (PRI). Jim has extensive experience in all phases of clinical research including European regulations. He is skilled at process improvement and providing insight across multiple disciplines within drug development.

Jim serves on the Board of PA-based Cadient, an Edison portfolio company.

Jim holds a B.S. in Biological Sciences from Villanova University, Masters in Environmental Sciences from Rutgers University, and M.B.A. from Duke University.



PANEL: INGREDIENTS FOR SUCCESS



Ted Werth

*Founder, CEO & Director
PlumChoice*

PlumChoice is the first remote services offering for the consumer and small business markets, founded in 2001. With the fast-growing adoption of broadband Internet, and increasing complexity of technology in everyday lives, Ted realized that the online, desktop sharing methods used in the enterprise were exactly the kind of quick, convenient and effective services the home and small office markets needed. From that, PlumChoice was born.

Prior to PlumChoice, Ted held various management and operating roles with data networking companies such as Chipcom and 3-Com. He led the creation and market delivery of an online collaboration service and a marketing portal for small businesses prior to starting PlumChoice. Ted started his career working as an engineer for Westinghouse.

Ted is now pursuing his life's passion — helping people of all ages and skill level use technology safely, securely and effectively so that it may be a source of help and enjoyment in their lives, not a hindrance. Ted is forever challenging the status quo in technology services, raising the bar before others have recognized the need and refusing to compromise. Frequently quoted in the media and the author of several patents, Ted remains the foremost expert in the exploding technology services market. Ted currently serves on the Board of Boston-based Sonicbids, an Edison portfolio company.

Born and raised outside the nation's capital in Chevy Chase, MD., Ted has always had an eye for engineering and technology. Ted studied at Lehigh University, earning his B.S.E.E., and earned an MBA from Northeastern University.

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Mark Feldman

Author, Five Frogs on a Log

Mark is the CEO of Destiny Bay Wine Imports, an exclusive importer and distributor of luxury, Bordeaux-style blends from Destiny Bay Vineyards, an artisan winery on Waiheke Island, New Zealand.

Earlier, Mark was a partner and global practice leader for merger and acquisition consulting at PricewaterhouseCoopers and president of the Rubicon Group, specializing in transactions and trade between US and Asian companies. In his over 25 years experience in international mergers and acquisitions, he worked with such diverse global corporations as Adobe Systems, Microsoft, Barclays Group, DaimlerChrysler, Hewlett Packard, Pearson plc, Alcoa, JDS Uniphase, Global Crossing, McDonnell-Douglas and Goodyear.

Formerly CEO and present board member of Space-Time Insight, the software leader in real-time

visual analytics, he was a founding partner of Startup Farms Inc., a startup Software incubator and AlertEnterprise, specializing in real-time IT and physical security. Prior to that Mark was Senior Vice President of Strategy at Virsa Systems, formulating product and market strategy and implementing product acquisitions and partnerships with some of the largest professional service and software development firms in the world. After negotiating the SAP acquisition of Virsa Systems, he became a Senior Vice President in the Product & Technology Group at SAP Labs, tasked with formulating strategies to market the SAP product portfolio to C-Level executives.

Mark is a frequently quoted speaker who has addressed audiences throughout the world on industry transforming events. His best-selling book on accelerating mergers and business transitions, *Five Frogs on a Log*, has sold over 65,000 copies and remains a business favorite in six languages.

Dan Hoffman

*CEO & Director
M5*

Dan joined M5 in early 2001 with more than 11 years of experience managing service providers.

Prior to M5, Hoffman co-founded Global Internet Group where he served as President before selling the company to Asia Online, an ISP holding company based in Hong Kong. As Executive Vice President of Operations, Hoffman grew Asia Online to a major pan-Asian Internet services firm with over 1000 employees.

Previously, Hoffman advised management teams at several service providers including Interport Communications. Before that he ran operations at Education Loan Services, Inc.

Hoffman graduated magna cum laude from Harvard College and received an MBA from the Wharton School of Business and a Masters of International Studies from the Lauder Institute at the University of Pennsylvania. In addition to his work at M5, Hoffman is the Board President of WIBO and was recognized as one of Crain's New York Top Entrepreneurs.



PANEL: ACQUISITION CASE STUDIES



R. Michael Leo *CEO & Director Operative*

In Michael's role as CEO and President of Operative, he has utilized his entrepreneurial drive and vision to spearhead corporate growth. With Mike at the helm, Operative has experienced revenue growth for the past six consecutive years and recruited some of advertising's most recognizable talent. Mike's leadership style and industry perspective is based on more than 17 years at the executive level at some of the most prestigious marketing and media companies in the digital world. He is consistently cited by interactive media and marketing industry publications such as BusinessWeek, DigiDay and iMedia Connection on trends, best practices and cutting-edge innovation in digital advertising.

Mike is also a regular speaker at IAB, iMedia, AdMonsters, Venture Capital and DM2Pro conferences, where he lends his passion for the space and perspective on disruptive, bleeding-edge solutions for media companies and their partners.

Prior to Operative, Mike cofounded aQuantive, a digital marketing organization now owned by Microsoft that became one of the industry's biggest success stories. He assembled the team that helped to grow aQuantive to one of the best and largest interactive agencies in the world.

Silicon Alley Insider ranked Mike as one of the top 100 most influential New Yorker's in digital media for two consecutive years, and *AlwaysOn* and KPMG named Mike as one of the ten executives in the first annual Madison Avenue IT list.

PANEL: ACQUISITION CASE STUDIES

Albert Subbloie *Founder, Director & CEO Tangoe*

Recognized as a telecommunications technology and Internet pioneer, Al Subbloie brings a visionary approach to Tangoe. As president and CEO of Tangoe, Al has led the company to become the leading software provider in the Telecom Expense Management (TEM) space. Tangoe has filed an S-1 for an IPO on NASDAQ under the symbol TNGO.

In 1984, after leaving Andersen Consulting, Al co-founded and served as CEO of Information Management Associates (IMA). Al was among the first to develop and market both call center voice and data solutions for integrated sales, marketing, telemarketing, and customer service activities. He guided the growth of this market leading company to more than \$50M in sales, and more than 300 customers in seven offices worldwide.

In 1997, Al co-founded Buyersedge.com, an Internet company in the field of reverse auction. Al is credited with one of the patents for reverse auction theory, the leading Internet paradigm in most shopping sites today (Ensera acquired Buyersedge.com.) Al also founded Freefire, a web enabled e-CRM customer interaction software, supporting email response, chat, and remote telephony in an ASP model involving complex data distribution requirements (Freefire was subsequently acquired by Teletech Holdings).

Al served on the board for Acsis, Inc., the leading provider of RFID device management technology solutions (which, under Al's leadership, was sold to Safeguard Scientific in Dec. 2005) and currently serves on the Board of NYC-based Operative Inc. Al has also served as Chairman of the Connecticut Technology Council (CTC) and now serves as a Board member for the CTC. Al received a degree with honors in Economics from Trinity College.



PANEL: ACQUISITION CASE STUDIES



Brian Twibell

*Co-founder, CEO & Director
RedVision*

Brian is one of the original investors and co-founders of the RedVision and was instrumental in creating the business plan that is the foundation for RedVision's success. He assumed the role of chairman and managing director in 2002 focusing most of his attention on strategic planning and business development. Brian assumed the position of Chief Executive Officer in 2006 to lead RedVision's rapid growth as an independent provider of technology-enabled solutions for the real property marketplace nationwide.

Prior to RedVision, Brian was President and CEO of Microbank Software, a firm he founded in 1984.

Microbank grew to 200 employees with major divisions in New York, London, and Singapore, and satellite sales offices in Amsterdam, Sydney, Tokyo, and Zurich. By 1999, Microbank had over 1,100 systems installed in more than thirty countries. Its customers included sixty of the world's top 100 financial services organizations. SunGard acquired Microbank in 2000. After the acquisition, Brian served as SunGard's Managing Director for Strategic Acquisitions.

Prior to Microbank, Brian spent two years running sales and marketing for a software company focused on banking applications. He started his career in banking operations with Manufacturers Hanover Trust (now JP Morgan Chase).

From
rule breaker

to rising
star

to game
changer.



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DAY TWO:

THURSDAY, MAY 12

- 7:30 AM Breakfast: Facilitated Networking by Industry
- 8:30 AM **Edison's Best Practices on Strategic Planning**
Chris Sugden, Edison Ventures
- 8:50 AM **Case Discussion:**
Strategic Decision Making: A Practical Approach
Edison All-Stars discuss their approach to strategic planning along with 2 defining moments in the road to their company's success. Session will conclude with 20 minute group discussion.
- John Bailye, President & CEO, EKR Therapeutics,
Founder & Former CEO Dendrite*
- Rick Rudman, President & CEO Vocus*
- 9:45 AM Break

- 10:15 AM **Seminar:** Creating Culture of Innovation.
Facilitated by Josh Linkner: Author Disciplined Dreaming
Discussion of how to create new ideas, empower employees to be creative and take risks, and sustain your competitive advantage over the long term. Discussion of 5-step process to ignite creativity across organization.
- 10:45 AM **Team Activity:** Exercise on innovation using Linker's 5 step framework.
- 11:30 AM Debrief
- 11:45 AM Lunch: Edison Closing Comments
- 12:30 PM Ground Transport to Golf (optional)
- 1:45 PM Golf Outing (Atlantic City Country Club)
- 5:45 PM Cocktails & Hors D'oevres
- 6:30 PM Departure



John E. Bailye *Executive Chairman & CEO EKR Therapeutics*

Previously, John Bailye founded, chaired and served as CEO of Dendrite, a pioneer in the development of software applications for pharmaceutical sales force management. Under his leadership, Dendrite grew from \$175,000 in annual sales in 1987 to more than \$420 million in 2006. The company received wide industry acclaim and was ranked 44 among the 100 fastest growing companies in the United States by Fortune Magazine in 2000. In May 2007, Dendrite was sold for nearly \$800 million. At that time Dendrite was a publicly traded global company that employed nearly 3,000 people in approximately 60 countries, and

its client base included the world's top 20 pharmaceutical companies.

Originally from Australia, John has been a leading supporter of entrepreneurship and technology growth in New Jersey, having served as a founding member of the New Jersey Technology Council. He received the Golden Door Award from the NJ International Institute and was twice honored with Ernst & Young's New Jersey Software and Technology Entrepreneur of the Year® award. In 2003, Business Review Weekly named him as one of the top 20 influential Australians in the United States.

John is a graduate of the University of New South Wales. He holds a Bachelor of Commerce degree in finance, marketing, and business.

Rick Rudman *Chairman & CEO Vocus*

Vocus, (Nasdaq:VOCS), is a leading provider of cloud-based marketing and PR software. Rick has over twenty years of experience in the software industry and is one of the early pioneers in what is now known as cloud computing or software-as-a-service (SaaS).

Under Rick's leadership, Vocus has grown from a start-up to one of the leading public SaaS companies. Vocus software helps organizations reach and influence buyers across social networks, online and through the media.

Prior to Vocus Rick was a senior executive at Dataway Corporation, a privately held software company developing mission critical software applications for KPMG, Booz Allen, U.S. Navy and other large companies and government agencies. Before Dataway, Rick worked as a computer programmer for the Barlow Corporation, a privately held company specializing in a real estate

development and retail businesses. Rick started work at Barlow Corporation as a staff accountant.

Rick began his career in the United States Air Force, enlisting after high school and rising to the rank of Sergeant during a four year tour of duty. He was stationed in the US and Germany, as part of a forward Air Support Operations Center. He received advanced training in electronics, computers and ground radio equipment, and was awarded medals for good conduct, expert marksmanship, and humanitarian service.

Rick received his Bachelor of Science degree in accounting from University of Maryland, and is a Certified Public Accountant. In 2003 Rick was selected as Ernst and Young's Entrepreneur of the Year in the software category for the Washington, D.C. region, and in 1999 Rick was named the High Tech Council of Maryland's Entrepreneur of the Year. He currently services as Vice Chairman of the Board Directors for the Baltimore Symphony Orchestra.



DISCIPLINED DREAMING



Josh Linkner *Author, Disciplined Dreaming*

Josh is the New York Times Bestselling author of *Disciplined Dreaming: A Proven System to Drive Breakthrough Creativity*. He is the CEO and Managing Partner of Detroit Venture Partners, a venture capital firm helping to rebuild urban areas through technology and entrepreneurship.

Josh is the Founder, Chairman and former CEO of the ePrize, the largest interactive promotion agency in the world providing digital marketing services for 74 of the top 100 brands.

Prior to ePrize, Josh was the founder and CEO of three other successful technology companies. He has been named the Ernst & Young Entrepreneur of the Year, the Automation Alley CEO of the Year, and the Detroit Executive of the Year. Josh's writings are published frequently by *Fast Company* and *Forbes* and he's been featured in the *Wall Street Journal*, *Inc. Magazine*, *USA Today*, and on CNBC. Josh is also a professional-level jazz guitarist performing regularly in jazz clubs throughout the United States.

Most importantly, Josh is on a mission to make the world more creative.



1 No matter what stage you're at, no matter what industry you're in, no matter how big the next step is, you all have 1 thing in common.

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EVENT ORGANIZERS

MICHAEL KOPELMAN, PARTNER Joined Edison in 2005. Leads eCommerce and Consumer sector and is a member of financial technology practice. Guides investment team in Pennsylvania and Ohio. Serves on board of four companies. Led 12 financings and championed 5 new investments. Co-President of Wharton's private equity alumni association. Began career at Credit Suisse where he advised numerous financing and M&A transactions. Launched E*TRADE's online investment bank which was acquired by SoundView. *BA University of Pennsylvania, MBA Wharton*



EDISON INVESTMENT TEAM

JOHN MARTINSON, FOUNDER/MANAGING PARTNER 32 years of venture capital experience. John organized 150 equity financings, raised 10 venture pools and served on Board of Directors of 45 companies. Past Chairman of National Venture Capital Association, PACT (MAC Alliance) and NJ Technology Council. Guides Edison's investments in healthcare and education information technology. John is currently director of four Edison companies. *BS USAF Academy, MS Purdue, MBA Southern Illinois*



CHRIS SUGDEN, MANAGING PARTNER Joined Edison in 2002. Chairs Edison's Investment Committee and leads the firm's financial technology practice. Guides firm strategy and operations. Led 19 initial investments including Operative, Billtrust, Scivantage, and FolioDynamix. Currently director of eight Edison companies. Instrumental in three premium exits including the recent IPO of Gain Capital (NYSE: GCAP). Previously \CFO and COO at Princeton eCom and CFO of two print and online magazine startups. Began his career as an auditor with PWC. *BS Michigan State, CPA*



JOE ALLEGRA, GENERAL PARTNER Joined Edison in 2001 and heads Edison's NJ team. Responsible for interactive marketing, HR and infrastructure investments, wireless applications and human resource software investments. Led 26 financings, served as a director of 21 companies and guided five to exit, including 7X return by VirtualEdge. Director of eight Edison portfolio companies. Successful entrepreneur with 20+ years of software industry experience. Co-founder and CEO of Princeton Softech. Former Chairman of New Jersey Technology Council. *BA Rutgers, MBA NYU*



EDISON INVESTMENT TEAM

MICHAEL BALMUTH, GENERAL PARTNER

25+ years technology and finance experience; 15+ years in venture capital. Joined Edison in 2008 and focuses on healthcare IT. Leads New England investment team. Serves as director of seven Edison portfolio companies. At Summit Partners he was responsible for 14 financings in 10 growth equity businesses. Achieved three IPOs and six M&A exits at gains. Realized proceeds returned over \$300 million, representing 3.5X invested capital and 43% IRR. Prior M&A experience at Broadview and operating roles at IBM. *BA Dartmouth, MBA Harvard*



EDISON INVESTMENT TEAM

ROSS MARTINSON, PARTNER 20 years venture capital experience. Serves as Edison's exit leader. Director of eight portfolio companies. Previously, Principal at Kidder Peabody and Vice President of two start-up companies. Advisory Board Member of the Private Equity CFO Association and New Jersey Technology Council CFO Board. *BA Yale, MBA NYU*



GARY GOLDING, GENERAL PARTNER 20+ years venture capital experience, joined Edison in 1997. Gary serves on the board of six companies. Directs Edison's regional investment team covering VA, MD and DC. Leads Edison's investments in communications and government IT. Originator and director of Edison's most recent IPO, Vocus (NASDAQ:VOCS), achieving 12X return. Co-founder of Pittsburgh Tech Council and past president of Pittsburgh Venture Capital Association. *BS Boston College, MA University of Pittsburgh*



TOM VANDER SCHAAFF, PARTNER Leads Edison's Analysis Team. Involved in over two dozen initial investments and more than fifty total investments since joining Edison in 2003. Serves as director of two Edison portfolio companies. Ten years of private equity experience and three years of investment banking experience. *BSE, Princeton University*



EDISON INVESTMENT TEAM

MICHAEL CICHOWSKI, PRINCIPAL Originates, evaluates and leads investments in financial technology. Focuses on innovative technology and business models in securities/capital markets, payments, banking and real estate. Supports NY and NJ activities. Joined Edison in 2007 and previously covered financial technology in Edison's Business Development group for over 3 years and originated several investments. Prior to joining Edison roles at Merrill Lynch, Monitor Group and venture-backed startup. *BS Rutgers University, MS Columbia University*



MICHAEL MADDEN, PRINCIPAL Identifies investments in Interactive Marketing, eCommerce and Consumer Technologies. Joined Edison's New England team in 2011. Previously principal at Polaris Venture Partners where he was responsible for building and leading outbound deal-sourcing effort. Sourcing and investment experience with Summit Partners and investment banking with Hambrecht & Quist. *AB Harvard University, MBA Stanford*



EDISON INVESTMENT TEAM

LENARD MARCUS, PRINCIPAL Identifies and evaluates investment opportunities in VA, MD and DC. Focuses on Healthcare IT and Security sectors. Serves as director of three companies. Operational experience in development and finance at IBM. Delivery and managerial roles at Princeton eCom. Joined Edison in 2005 as Business Development Associate. *BS Stanford, MBA Columbia*



SEVER TOTIA, PRINCIPAL Leads investments in education, business intelligence, mobility and application software companies primarily located in VA, MD and DC area. Joined Edison in 2007. Serves as director of four Edison portfolio companies. Investment experience with Lazard Technology Partners and operating experience with Thomson Financial. 15 years in technology industry. *BS Virginia Tech, CFA*



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