



20-22 October 2015, Bathurst NSW

Host and Platinum Sponsor



# REGIONAL COLLABORATIVE INVESTMENT SUMMIT

MONDAY, 19 OCTOBER 2015 10:00AM – 4:00PM

James Hardie Dining Room, Centre for Professional Development  
Charles Sturt University, Bathurst

## Background

World-wide investment funding is operating more and more on a collaborative basis.

More partners are funding more projects, collaboratively. Be this Crowdfunding, Crowdfinance, Collaborative Investment or Capital Aggregation this area is becoming very topical and challenges our traditional approaches to investing in social and economic development projects.

Experience to date suggests that successful collaborative investment requires the project driver, the lead investor and co-investors to unite in pursuit of one common goal, the aggregation of funds in a compliant and transparent manner and the execution of a sound plan.

Governments, venture capitalists, social entrepreneurs, crowd funders, communities, families and individuals are all looking to work with like-minded others to achieve vision and funding for the future.

The capacity to efficiently and transparently manage collaborative projects with high levels of compliance, governance and accountability is presently lagging but internet based aggregation platforms are rapidly changing this.

## Australia's first National Summit on Collaborative Investment

On the 19<sup>th</sup> October 2015 at Bathurst NSW, a conversation will commence about how we can deliver the long term benefits of collaborative investment. The Summit will explore the opportunities that collaboration provides in reshaping the way we finance regional economic development.

## International Expert to Facilitate Summit

The Regional Collaborative Investment Summit will be chaired by Paul Niederer, one of the world's leading authorities on equity based crowdfunding investment. Paul speaks internationally on Collaborative Investment and has run a collaborative funding platform in Australia called ASSOBS.



Paul Niederer, Chair, CIM Australia

## Program Outline

The one day summit will consist of a series of morning panel discussions on the meaning of:

- collaborative investment,
- its characteristics,
- impacts of digital disruption on funding,
- new paradigms and
- what this means to creating an investable business case for regionally significant projects.

The afternoon sessions will feature:

- **Business Case Bootcamp:** a small group of projects to be pitched to the audience and a select panel for feedback
- a panel discussion on the need for transparency, independence and accountability in delivering collaborative investment projects
- an open discussion to identify key actions for progressing the investability of Collaborative investment projects.



*The world's first equity crowdfunding portal ASSOBS from Australia has been operating for 8 years and have raised \$135 million through their portal. Their high standards are apparent in the results they have achieved. To date they have had zero fraud and 85% of business invested in through their portal are still operating and successful. (Oscar Jofre Equity Crowd funding: 101, 2015 p21)*

**"Attend this benchmark event to discover the opportunities Regional Australia can secure from this new innovation in financing sustainable economic growth"**

**TO REGISTER VISIT: [www.segra.com.au/registration.php](http://www.segra.com.au/registration.php)**



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## Program for the Regional Collaborative Investment Summit

10:00am	Morning tea and welcome from Charles Sturt University
10:30am	Opening remarks from Kate Charters
10:35am – 10:50am	Context of Collaborative Investment
10:50am – 11:10am	Digital disruption, new technology and achieving project funding
11:10am – 11:30am	What is Collaboration?
11:30am – 11:50am	What is an investable Business Case?
11:50am – 12:20pm	What are the paradigm shifts e.g. shared values, revenue vs grants what are the blockers?
12:20pm – 12:30pm	Summary of morning session
12:30pm – 1:30pm	Lunch
1:30pm – 2:15pm	Pre-planned Pitches – Hypothetical Shark Tank
2:15pm – 2:45pm	Demonstrating transparency, independence and accountability
2:45pm – 3:45pm	How might you enhance the investability of a project in which you are involved?
3:45pm	Close

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