

FOOD & BEVERAGE
FARM ^{to} LABEL
SUMMIT



Collaborate • Innovate • Celebrate

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry, no matter how small, should be recorded to ensure the integrity of the financial data. This includes not only sales and purchases but also expenses and income. The document provides a detailed list of items that should be tracked, such as inventory levels, accounts payable, and accounts receivable. It also outlines the procedures for recording these transactions, including the use of double-entry bookkeeping to ensure that the books balance.

The second part of the document focuses on the analysis of the financial data. It explains how to calculate key financial ratios and metrics, such as the gross profit margin, operating profit margin, and return on investment. These metrics are used to evaluate the company's performance and identify areas for improvement. The document also discusses the importance of comparing the company's performance to industry benchmarks and competitors. This helps to provide context and identify trends in the market.

The final part of the document covers the preparation of financial statements. It provides a step-by-step guide to creating the income statement, balance sheet, and cash flow statement. It also discusses the importance of auditing the financial statements to ensure their accuracy and reliability. The document concludes by emphasizing the role of financial reporting in decision-making and the overall success of the business.

Thank you for coming.

Welcome to our 7th food and beverage executive summit. After a COVID-impacted 4 year hiatus, we are thrilled to present Farm to Label again this year, in person!

We are grateful for the high-caliber speakers, partners and guests who continue to support Farm to Label with their time and knowledge.

BETTER TOGETHER

Thoughtful panels will explore how we can work together to create better products, processes, and businesses to nourish a healthier and more sustainable future. From seeds to store shelves, and employees to consumers, strategic thinking about how we source our ingredients, pack our goods, and produce and sell our products in a pandemic-influenced and changed world. We invite you to share your own experiences, learn from others in the food and beverage industry, and leave committed to working better – together.

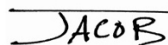
COLLABORATE. INNOVATE. CELEBRATE

As we aim to be better together, we focus on the areas where we can have a meaningful impact through collaboration and innovation. Our panels combine relevant business topics with timely perspectives regarding diversity, sustainability, food safety, novel ingredients and brand building. Your contribution to these topics is invaluable and should be celebrated as we explore and share best practices moving forward.

Thank you for your continuing support of outstanding food and beverage brands, from Farm to Label.



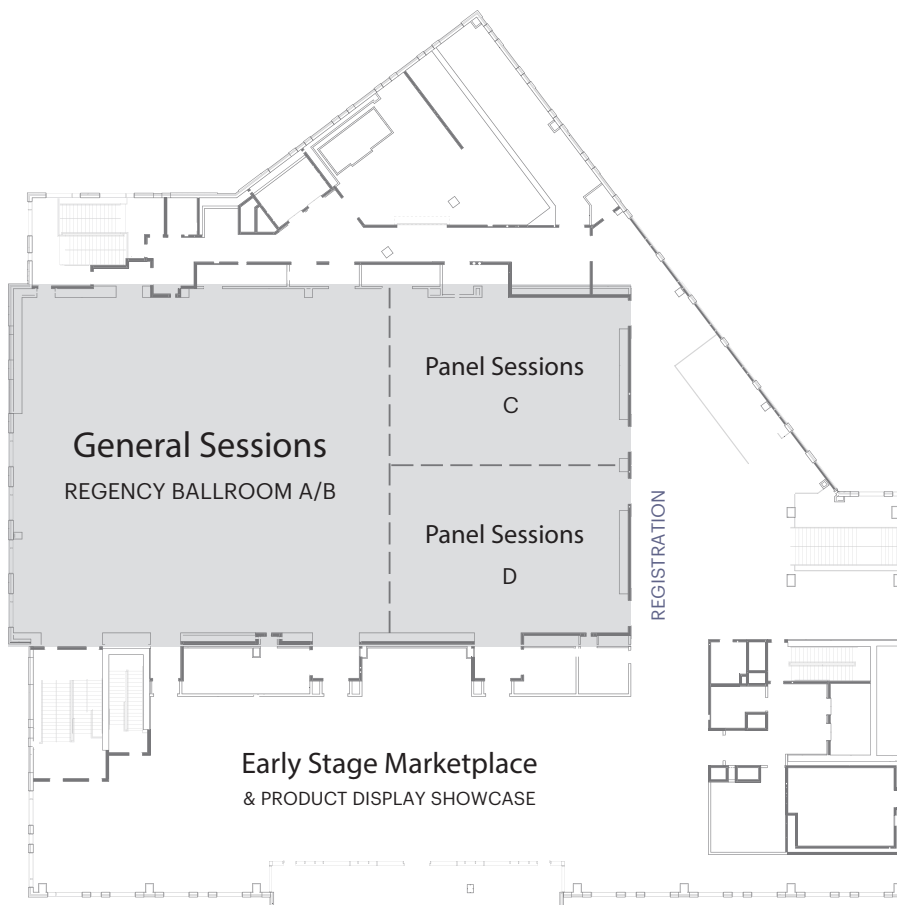
Jesse D. Lyon
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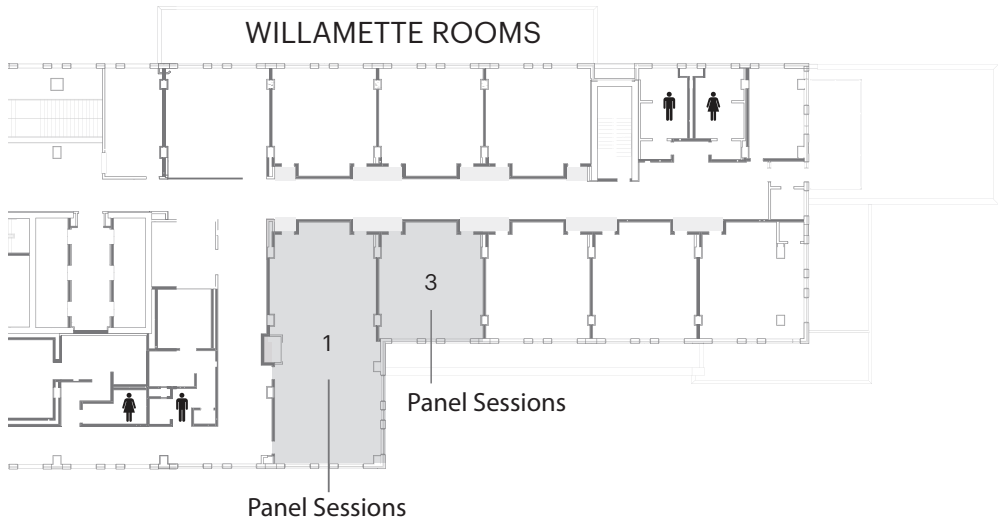
Jacob Harper
Partner & Co-Chair
Food + Beverage Industry Practice
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Map

Second Floor



WILLAMETTE ROOMS



Early Stage Marketplace

12:30 – 1:30 pm

Come meet a select group of early stage food and beverage companies with great people, products, and plans. Ideal for investors and potential strategic partners.

Boozy Jerky

Choi's Kimchi Co.

For Bitter For Worse

Ground Up

Hibisbloom

Hot Mama Salsa

Jøyus

Roseade

Secret Aardvark

Trail Butter

Product Display Showcase

All items will be donated to the **St. Andrew Emergency Food Pantry** following the event.



We are pleased to welcome Rob McMillan to impart perspective, wisdom and inspiration

Rob McMillan

EVP & Founder, Silicon Valley Bank Wine Division

LESSONS IN CRISIS MANAGEMENT

Room: Regency Ballroom A/B

Rob McMillan is one of the top wine-business analysts in the United States and the author of Silicon Valley Bank's highly regarded annual State of the *Wine Industry Report*, described by the New York Times as "... probably the most influential analysis of its kind."

With decades of experience researching the industry and working with winery clients, his views are sought after and trusted by winery owners, journalists, entrepreneurs, and investors. He is a prominent speaker, both domestically and internationally, and you will find him extensively quoted in national, regional, and trade press. He has also been named several times as one of the Top 50 Most Influential People in the US Wine Business.

Rob's banking career has spanned 35-plus years — more than 25 with Silicon Valley Bank. In that time, he has held many roles, including founder and division manager of the Wine Group, executive manager of the bank's Commercial Division, and several years as a member of Silicon Valley Bank's Managing Committee. He is currently responsible for establishing new winery relationships and offers private management presentations and strategic consulting to clients across the portfolio for Silicon Valley Bank, a division of First Citizens Bank.



Join the Conversation

Share your Farm to Label experience on Twitter, LinkedIn, and Instagram with the hashtag #farmtolabel2023 and #F2L2023.

After the event, keep an eye out for an email with resources, photos, and more from today's program

Be sure to @ us and follow our social media!



@DWTFOODBEV



DWTLAW



DAVIS WRIGHT TREMAINE LLP

#FARMTOLABEL2023 #F2L2023

Agenda

- 12:30 – 1:30 pm** **CHECK IN & EARLY STAGE MARKETPLACE**
- 1:30 – 2:10 pm** **WELCOME + GENERAL SESSION/FED TALK**
Welcome by Jesse Lyon & Jacob Harper, Co- Chairs,
Food + Beverage Group, Davis Wright Tremaine LLP
FedTalk by Rob McMillan, Silicon Valley Bank, Wine Division
- 2:10 – 2:20 pm** BREAK
- 2:20 – 3:05 pm** **PANEL SESSION #1**
- Amplify! Making the Most of Endorsements and Influencers
 - Getting Out of Start-Up Mode
 - Swipe Right: Jumping into a Co-packer Relationship
 - Corraling a Crisis: Mitigating Potential Food Safety Events
- 3:05 – 3:15 pm** BREAK
- 3:15 – 4:00 pm** **PANEL SESSION #2**
- Punting the Plaintiffs' Lawyers: Labeling and Packaging
 - Let's Make a Deal: Building Relationships with Investment Partners
 - Post-Pandemic Workforce Realities
 - It's Not Easy Being Green: Navigating Supply Chain, Stakeholder, and Sustainability Commitments
- 4:00 – 4:10 pm** BREAK
- 4:10 – 4:55 pm** **PANEL SESSION #3**
- Cutting-Edge Ingredients: Innovating What's Inside Your Products
 - Crash Course on Disruptive Brand Strategies
 - What Investment Bankers Might Not Tell You About M&A
 - Commitments, Culture, and Collaborations that Matter
- 4:55 – 5:05 pm** BREAK
- 5:05 – 5:50 pm** **KEYNOTE SESSION**
Stephen Satterfield, Television Host + Founder of
Whetstone Media and HONE Talent
- 5:50 pm** **FARM TO LABEL PARTY**

Panel Sessions

2:20 – 3:05 pm

AMPLIFY! MAKING THE MOST OF ENDORSEMENTS AND INFLUENCERS

Room: Regency Ballroom C

Timing, talking points, and tactics to realize successful brand strategies.

Panelists: **Andrew Harting**, Founder, Nocking Point Wines/Wine3.eth; **Shanika Hillocks**, Talent Management, HONE Talent; **Steve Vigilante**, Director of Growth, OliPop

Moderator: **Laura Warf**, Partner, Davis Wright Tremaine LLP

GETTING OUT OF START-UP MODE

Room: Regency Ballroom D

Building foundations to grow and mature your company.

Panelists: **Rudy Kellner**, CEO, pFriem Family Brewers; **Ben Goodwin**, Co-Founder, CEO and Formulator, OliPop; **Christy Goldsby**, Founder, Board Chair, Honey Mama's

Moderator: **Knutte Gregg**, Partner, Davis Wright Tremaine LLP

SWIPE RIGHT: JUMPING INTO A CO-PACKER RELATIONSHIP

Room: Willamette 1

How to find the right contract manufacturer and ensure a long and healthy relationship.

Panelists: **Matt Merritt**, Vice President, USA Legal, Oatly; **Jer Monson**, General Counsel/CHRO, DrinkPAK

Moderator: **Meghan Moran**, Partner, Davis Wright Tremaine LLP

CORRALLING A CRISIS: MITIGATING POTENTIAL FOOD SAFETY EVENTS

Room: Willamette 3

Strategies for assessing and managing moments when the stakes are high.

Panelists: **Dave Ernst**, Mediator, David Ernst Food Safety Mediation; **Jill Stuber**, Co-Founder, Food Safety Catalyst Group; **Don Zink**, President – Food & Regulatory Compliance, IEH Laboratories and Consulting Group

Moderator: **Ashley Watkins Vulin**, Partner, Davis Wright Tremaine LLP

3:15 – 4:00 pm

PUNTING THE PLAINTIFFS’ LAWYERS: LABELING AND PACKAGING

Room: Regency Ballroom C

Trends and hot topics in litigation about alleged mislabeling and “poison packaging.”

Panelists: **Matteo Girard Maxon**, President, Ancient Organics; **Farzad Mohebbi**, President and CEO, Maxim’s Nutricare, Inc.; **Kim Bousquet**, Counsel, Davis Wright Tremaine, LLP

Moderator: **Jacob Harper**, Partner & Co-Chair Food + Beverage Industry Practice, Davis Wright Tremaine LLP

LET’S MAKE A DEAL: BUILDING RELATIONSHIPS WITH INVESTMENT PARTNERS

Room: Regency Ballroom D

Finding and building relationships with investment partners who know your niche.

Panelists: **CyVan Yamamoto**, Director of Strategy and New Ventures, Irresistible Foods Group; **Isabel “Izzy” Nixon**, Investment Associate, Karp Reilly; **Ken Plasse**, Managing Director, KP Growth Advisors

Moderator: **Shelly Malik**, Associate, Davis Wright Tremaine LLP

POST-PANDEMIC WORKFORCE REALITIES

Room: Willamette 1

The evolution of the workplace and employee expectations.

Panelists: **Julie Stewart**, Vice President, Human Resources, Reser’s Fine Foods, Inc.;

David Thurston, Director and Executive Consultant, Stewart Leadership

Moderator: **Christie Totten**, Partner, Davis Wright Tremaine LLP

IT’S NOT EASY BEING GREEN: NAVIGATING SUPPLY CHAIN, STAKEHOLDER, AND SUSTAINABILITY COMMITMENTS

Room: Willamette 3

Supply chain accountability to meet sustainability goals, stakeholder expectations, and promotional commitments.

Panelists: **Dallas Hall Defrees**, Regenerative Ranching Program Director, Sustainable Northwest; **Victor Friedberg**, Managing Partner, New Epoch Capital; **Alisa Knapp**, Owner, Grows Together Consulting

Moderator: **Elaine Albrich**, Partner, Davis Wright Tremaine LLP

Panel Sessions

4:10 – 4:55 pm

CUTTING-EDGE INGREDIENTS: INNOVATING WHAT'S INSIDE YOUR PRODUCTS

Room: Ballroom C

What's new, what's trendy, and what to consider from R&D, retailer, and regulatory perspectives.

Panelists: **Webb Girard**, Senior Director R&D, CuliNex; **Nicole Phillis**, Partner, Davis Wright Tremaine LLP; **Thom King**, CEO and Food Specialist, Icon Foods
Moderator: **Alli Condra**, Associate, Davis Wright Tremaine LLP

CRASH COURSE ON DISRUPTIVE BRAND STRATEGIES

Room: Ballroom D

Opportunities and pitfalls of brand development and thinking differently about your brand roadmap.

Panelists: **Brendan Driscoll**, General Counsel, Fall Creek Farm and Nursery, Inc.; **Don Poppenroth**, Founder/CEO, Dry Fly Distilling; **Ben Garner**, CMO, Konnect Agency
Moderator: **Sheila Fox Morrison**, Partner, Davis Wright Tremaine LLP

WHAT INVESTMENT BANKERS MIGHT NOT TELL YOU ABOUT M&A

Room: Willamette 1

Anticipating pre-deal pain points, mid-transaction chaos, and post-mortem realities.

Panelists: **Marcus Reed**, General Counsel, Brewers Collective, Anheuser-Busch; **Anna Maria Ponzi**, Owner, Amponzi & Company; **Stan Firestone**, Board Member, Firestone
Moderator: **Melanie Broome**, Associate, Davis Wright Tremaine LLP

COMMITMENTS, CULTURE, AND COLLABORATIONS THAT MATTER

Room: Willamette 3

Integrating diversity, equity, inclusion, and other social concerns to enhance the long game for your company and its community.

Panelists: **Jaime Arredondo**, Executive Director, Capaces Leadership Institute; **Juan Campos**, Director of Economic Opportunity, Hacienda CDC; **Lara Dickinson**, Executive Director and Co-Founder, OSC; **Alison Vercruyse**, Principal, Alison Very, Founder/18 Rabbits
Moderator: **Olivier Jamin**, Associate, Davis Wright Tremaine LLP

Keynote Session

5:00 – 5:45 pm



FEATURED GUEST

Stephen Satterfield

Food writer, publisher, media entrepreneur and founder of *Whetstone Media* and *HONE Talent* and host of the award-winning Netflix docuseries, *High on the Hog*

A CONVERSATION WITH STEPHEN SATTERFIELD

Room: Regency Ballroom A/B

The work of our guest, the award-winning media entrepreneur, publisher, food writer, podcast host (and former sommelier) Stephen Satterfield, reveals his deep personal commitment to redefining food and beverage as a means to organize, activate and educate.

We will explore Stephen's entrepreneurial journey in creating Whetstone Media, a company dedicated to exploring food origins and culture. Whetstone uses inclusive storytelling about food as a means to better understand the world through a diverse, global lens. It explores how we can more effectively connect people and ideas by sharing food experiences that enrich our collective knowledge and empathy. Stephen's subsequent vision, Hone Talent, furthers this by creating new opportunities to amplify important culinary voices through media and brand relationships.

With Stephen, we will examine our roles as food and beverage business leaders and agents capable of making lasting change for our food systems, our teams, our customers, and communities around the world.

Philanthropy Partner



MATT CHOI MEMORIAL GRANT FUND

We're honored to celebrate the life of Matt Choi, a cherished part of our Farm to Label community.

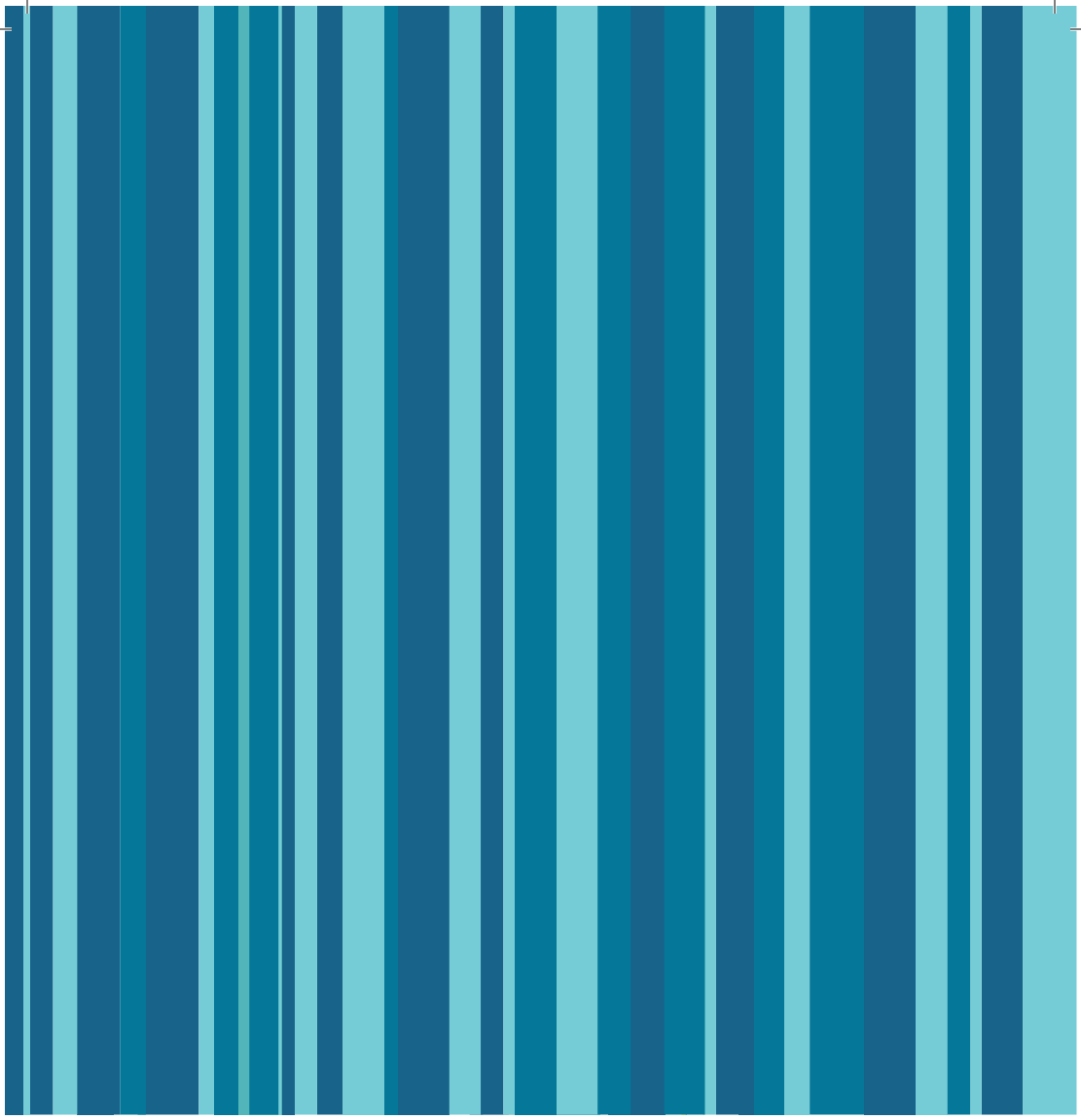
Matt and his mother launched Choi's Kimchi at the Portland Farmers Market in 2011, producing hand-crafted, small-batch kimchi with a recipe passed down from generation to generation. Matt was a champion of supporting access to farmers markets, and he was a wonderful leader among the Portland local food community. He built close ties with other market vendors and offered his support and leadership. He will forever be remembered for his generous spirit and kindness. Matt was a featured partner at our Farm to Label Early Stage Marketplace in 2019, and Choi's Kimchi continues today as an award-winning, sustainable regional business.

In his honor, and to help the next generation of food and beverage entrepreneurs get their start, the Portland Farmers Market has established **the Matthew Choi Farmers Market Success Grant Program**, which aims to reduce financial barriers for launching or expanding at any Portland-area farmers market – with particular focus on food and farm business owners from under-represented communities and a cultural connection to the products they sell. We hope you will help us carry forward Matt's mission by making a contribution to the **Matthew Choi Farmers Market Success Grant Program**.

Additional grant details, including how to make a gift can be accessed by scanning here:



You may also make a tax deductible contribution by writing a check made to "Oregon Community Foundation" with "Donation to Matthew Choi Memorial Fund" in the memo and mailing it to the Matthew Choi Memorial Fund, c/o Oregon Community Foundation, 1221 SW Yamhill St., Suite 100, Portland, OR 97205.



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