

Technology, Media & Telecom Conference

MARCH 3 – 6, 2014 | PALACE HOTEL | 2 NEW MONTGOMERY STREET | SAN FRANCISCO, CALIFORNIA

Monday, March 3rd

Agenda is subject to change.

7:00 a.m. – 5:00 p.m. Hospitality Lounge, French Parlor, Second Floor

6:30	Buffet Breakfast <i>Ralston Room - Lobby Level</i>							
7:00	Conference Registration <i>Regency Foyer - Lobby Level</i>							
	Grand Ballroom (Lobby Level)	Gold Ballroom (Lobby Level)				Twin Peaks (Second Floor)		
7:55	Opening Remarks Drew Guevara, Managing Director, Technology Investment Banking, Morgan Stanley							
8:00	Microsoft Qi Lu, EVP, Applications & Services	SanDisk Sanjay Mehrotra, CEO				Plantronics Ken Kannappan, CEO Pam Strayer, CFO		
8:45	VMware Jonathan Chadwick, CFO Stephen Mullaney, SVP/GM, Networking & Security Martin Casado, Chief Architect Networking	Seagate Technology Pat O'Malley, CFO				TripAdvisor Julie Bradley, CFO		
9:30	SAP Vishal Sikka, Exec. Board Member, Product & Innovation	Altera Ron Pasek, CFO				Care.com Sheila Marcelo, Founder & CEO		
10:15	Lending Club Renaud Laplanche, CEO	Fortinet Ken Xie, CEO Andrew Del Matto, CFO				Texas Instruments Richard Templeton, CEO		
11:00	Research Panel Hosted by Adam S. Parker, Ph.D., US Equity Strategy, Morgan Stanley Katy Huberty, IT Hardware Benjamin Swinburne, Media, Cable and Satellite Simon Flannery, Telecom Services Scott Devitt, Consumer Internet <i>Lunch Available at 11:30am in Regency Foyer - Lobby Level</i>							
12:00	Keynote Presentation: Hewlett Packard Meg Whitman, CEO							
	Grand Ballroom (Lobby Level)	Gold Ballroom (Lobby Level)	Twin Peaks (Second Floor)	Sea Cliff (Second Floor)	Pacific Heights (Second Floor)	Presidio (Second Floor)	Marina (Second Floor)	Telegraph (Second Floor)
12:45	Zynga Don Matrick, CEO	Intuit Brad Smith, CEO	Liberty Global Rick Westerman, SVP, IR & Corp. Comm. Manuel Kohnstamm, SVP & Chief Policy Officer	Rogers Communications Edward Rogers, Deputy Chairman & EVP	NICE Systems Eran Liron, EVP, Marketing & Corporate Development	Tintri Ken Klein, CEO Kieran Harty, CTO	Trulia Pete Flint, CEO Sean Aggarwal, CFO	Acxiom Warren Jensen, CFO
1:20	Symantec Steve Bennett, CEO	American Tower Tom Bartlett, CFO	News Corp Bedi A. Singh, CFO	Shutterfly Jeff Housenbold, CEO	Applied Micro Paramesh Gopi, CEO	ASML Holding Peter Wennink, CEO	Dolby Laboratories Lewis Chew, CFO	Blackboard Jay Bhatt, CEO Bill Davis, CFO
1:55	Netflix David Wells, CFO	Brocade Lloyd Carney, CEO Dan Fairfax, CFO	Cavium Art Chadwick, CFO	Blue Nile Harvey Kanter, CEO	Nuance Communications Paul Ricci, Chairman & CEO			
2:30	Keynote Presentation: LinkedIn Jeff Weiner, CEO							
3:15	Break (10 minutes)							
3:25	Autodesk Mark Hawkins, CFO	Medidata Solutions Tarek Sherif, Chairman & CEO	Interpublic Group Jerry Leshne, SVP, IR	Zulily Darrell Cavens, CEO Marc Stolzman, CFO	Integrated Device Technology Greg Waters, CEO Brian White, CFO		MaxPoint Joe Epperson, CEO	
4:00	Expedia Mark Okerstrom, CFO	Cloudera Jim Frankola, CFO	DocuSign Mike Dinsdale, CFO	Silicon Graphics Jorge Titingier, SGI CEO Bob Nikl, SGI CFO	Linx Dennis Herszkowicz, CFO	Constant Contact Harpreet Grewal, CFO	Misys Nadeem Syed, CEO	
4:35	Zillow Spencer Rascoff, CEO	Lionsgate James Barge, CFO Brian Goldsmith, Co-COO	Ctrip.com Jenny Wu, Chief Strategy Officer	NQ Mobile Omar Khan, Co-CEO	Cadence Lip-Bu Tan, CEO	Micrel Ray Zinn, CEO	Opera Software Erik Harrell, CFO & CSO	ServiceSource International Mike Smerklo, CEO Ashley Johnson, CFO

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Tuesday, March 4th

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7:00 a.m. – 5:00 p.m. Hospitality Lounge, French Parlor, Second Floor

6:30	Buffet Breakfast <i>Ralston Room - Lobby Level</i>							
7:00	Conference Registration <i>Regency Foyer - Lobby Level</i>							
	Grand Ballroom (Lobby Level)		Gold Ballroom (Lobby Level)			Twin Peaks (Second Floor)		
8:00	Liberty Media Greg Maffei, CEO		IBM Robert LeBlanc, Senior Vice President, Software & Cloud Solutions					
8:45	Keynote Presentation: Verizon Communications Lowell McAdam, CEO							
9:30	Adobe Shantanu Narayen, CEO		Discovery Communications Andrew Warren, CFO			Corning James Flaws, CFO		
10:15	Comcast Michael Angelakis, CFO & Vice Chairman		Yahoo Ken Goldman, CFO			NetApp Nick Noviello, CFO		
11:00	Keynote Presentation: Bill Campbell Chairman of the Board at Intuit & Board Director at Apple <i>Lunch Available at 11:30am in Regency Foyer - Lobby Level</i>							
12:00	Keynote Presentation: Salesforce.com Marc Benioff, Chairman & CEO							
	Grand Ballroom (Lobby Level)	Gold Ballroom (Lobby Level)	Twin Peaks (Second Floor)	Sea Cliff (Second Floor)	Pacific Heights (Second Floor)	Presidio (Second Floor)	Marina (Second Floor)	Telegraph (Second Floor)
12:45	Keynote Presentation: CBS Leslie Moonves, CEO							
1:30	Broadcom Eric Brandt, CFO	Charter Communications Christopher Winfrey, CFO	Shutterstock Jon Oringer, CEO Tim Bixby, CFO	Jive Software Tony Zingale, CEO Bryan LeBlanc, CFO	Zayo Dan Caruso, CEO	Citrix Systems Jesse Lipson, VP & GM Data Sharing	Technicolor Frederic Rose, CEO Stephane Rougeot, CFO	HubSpot John Kinzer, CFO JD Sherman, COO
2:05	Live Nation Entertainment Michael Rapino, CEO	Cvent Reggie Aggarwal, CEO Peter Childs, CFO Chuck Ghoorah, EVP of Sales & Marketing	Fusion-io Ted Hull, CFO John Spiers, SVP & GM, ioControl Products	Telephone & Data Systems / U.S. Cellular Ken Meyers, USM CEO	Polycom Eric Brown, CFO & COO	Cray Brian Henry, CFO	AppDynamics Jyoti Bansal, Founder & CEO Walter Berger, CFO	Fairchild Semiconductor Mark Frey, CFO
2:40	QlikView Lars Bjork, CEO Tim MacCarrick, CFO	Starz Chris Albrecht, CEO	Crown Castle Jay Brown, CFO	ServiceNow Frank Sloomman, CEO	Evernote Ken Gullicksen, COO	Cypress Semiconductor Neil Weiss, SVP & Treasurer	Linear Technology Lothar Maier, CEO	QLogic Prasad Rampalli, President & CEO Jean Hu, SVP & CFO
3:15	Akamai Jim Benson, CFO	DIRECTV Bruce Churchill, President, DIRECTV Latin America	Xilinx Jon Olson, CFO	Barracuda Networks BJ Jenkins, CEO David Faugno, CFO	Maxim Bruce Kiddoo, CFO	PMC-Sierra Steve Geiser, CFO		
3:50	Venture Capital Panel Moderated by Paul Kwan, Head of Internet & Software Banking, Morgan Stanley Benchmark – Bill Gurley, General Partner Emergence Capital – Gordon Ritter, Partner GGV Capital – Glenn Solomon, Managing Partner Greylock Partners – Asheem Chandna, Partner Insight Venture Partners – Deven Parekh, Managing Director							
4:50	Tribune Peter Liguori, CEO	SolarWinds Kevin Thompson, CEO Jason Ream, CFO	OSI Systems Alan Edrick, CFO	Fleetmatics Jim Travers, CEO Steve Lifshatz, CFO	Proto Labs Jack Judd, CFO	Peregrine Semiconductor Jay Biskupski, CFO	Proofpoint Gary Steele, CEO	

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Wednesday, March 5th

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7:00 a.m. – 5:00 p.m. Hospitality Lounge, French Parlor, Second Floor

6:30	Buffet Breakfast Ralston Room - Lobby Level							
7:00	Conference Registration Regency Foyer - Lobby Level							
	Grand Ballroom (Lobby Level)	Gold Ballroom (Lobby Level)				Twin Peaks (Second Floor)		
8:00	Keynote Presentation: Alibaba Group Joe Tsai, Executive Vice Chairman							
8:45	Keynote Presentation: 21st Century Fox James Murdoch, Deputy COO, Chairman & CEO, International							
9:30	Visa Byron Pollitt, CFO	tw telecom Larissa Herda, Chairman & CEO Mark Peters, EVP & CFO						
10:15	Time Warner Cable Artie Minson, CFO	Tableau Software Christian Chabot, CEO Tom Walker, CFO			Cognizant Technology Karen McLoughlin, CFO			
11:00	eBay Bob Swan, CFO <i>Lunch Available at 11:30am in Regency Foyer - Lobby Level</i>	Veeva Peter Gassner, CEO			CenturyLink Stewart Ewing, CFO			
12:00	Keynote Presentation: Google Nikesh Arora, SVP & Chief Business Officer							
	Grand Ballroom (Lobby Level)	Gold Ballroom (Lobby Level)	Twin Peaks (Second Floor)	Sea Cliff (Second Floor)	Pacific Heights (Second Floor)	Presidio (Second Floor)	Marina (Second Floor)	Telegraph (Second Floor)
12:45	Time Warner Richard Plepler, HBO CEO	HomeAway Brian Sharples, CEO	Nimble Storage Suresh Vasudevan, CEO Anup Singh, CFO	Synopsys Aart de Geus, CEO Brian Beattie, CFO	Freescale Semiconductor Alan Campbell, CFO	Bazaarvoice Gene Austin, CEO Jim Offerdahl, CFO	Level 3 Communications Andrew Crouch, President, North America Neel Dev, GVP of Finance	OpenText Mark Barrenechea, CEO Paul McFeeters, CFO
1:20	Electronic Arts Blake Jorgensen, CFO	MercadoLibre Pedro Arnt, CFO	Millennial Media Michael Avon, CFO	NCR Bob Fishman, CFO John Bruno, EVP	Frontier Communications John Jureller, EVP & CFO	Rapid7 Corey Thomas, CEO Steven Gatoff, CFO	Enphase Energy Kris Sennesael, CFO	Aruba Networks Keerti Melkote, Founder & CTO
1:55	T-Mobile Braxton Carter, CFO Neville Ray, CTO	Grupo Televisa Carlos Madrazo, IRO	Check Point Software Technologies Tal Payne, CFO	Inphi John Edmunds, CFO	GoDaddy Scott Wagner, CFO & COO	Spansion John Kispert, CEO	RetailMeNot Cotter Cunningham, CEO Douglas Jeffries, CFO	Guidewire Software Marcus Ryu, CEO Karen Blasing, CFO
2:30	OpenTable Duncan Robertson, CFO	Rovi Peter Halt, CFO	AVG Technologies Gary Kovacs, CEO	DigitalGlobe Yancey Spruill, CFO	Lattice Semiconductor Joe Bedewi, CFO	Intralinks Derek Irwin, CFO	Gogo Michael Small, CEO	NXP Semiconductor Rick Clemmer, CEO Peter Kelly, CFO Jeff Palmer, VP, IR
3:05	Break (10 minutes)							
3:15		Avago Technologies Anthony Maslowski, CFO	MongoDB Max Schireson, CEO Sydney Carey, CFO	ARM Holdings Antonio Viana, EVP Commercial & Global Development	Lynda.com Eric Robison, CEO	Westport Innovations David Demers, CEO	Rackspace Jason Luce, VP, IR	Electronics For Imaging David Reeder, CFO Marc Olin, COO
3:50	CA Technologies Rich Beckert, CFO	Criteo JB Rudelle, CEO & Co-Founder Benoit Fouilland, CFO	CDW Thomas Richards, CEO	Cincinnati Bell Leigh Fox, CFO	TriQuint Semiconductor Steve Buhaly, CFO	Micron Technology Ivan Donaldson, IR		Move Steve Berkowitz, CEO Rachel Glaser, CFO
4:25	Capgemini Aiman Ezzat, CFO	Hortonworks Rob Bearden, CEO	Silicon Labs John Hollister, CFO	Endurance Hari Ravichandran, CEO Tiv Ellawala, CFO	New Relic Lew Cirne, CEO Mark Sachleben, CFO	DeNA Shintaro Asako, CEO of DeNA West	Mavenir Systems Pardeep Kohli, CEO Terry Hungle, CFO	Imperva Terry Schmid, CFO

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Thursday, March 6th

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7:00 a.m. – 2:00 p.m. Hospitality Lounge, French Parlor, Second Floor

6:30 Buffet Breakfast

Ralston Room - Lobby Level

7:00 Conference Registration

Regency Foyer - Lobby Level

	Grand Ballroom (Lobby Level)	Twin Peaks (Second Floor)	Sea Cliff (Second Floor)	Pacific Heights (Second Floor)	Presidio (Second Floor)	Marina (Second Floor)	Telegraph (Second Floor)
8:00	Keynote Presentation: AT&T Randall Stephenson, CEO						
8:45	Pandora Brian McAndrews, CEO	Alcatel-Lucent Philippe Keryer, Chief Strategy & Innovation Officer	Atmel Steve Laub, CEO	NVIDIA Chris Evenden, IR	TELUS John Gossling, CFO	MuleSoft Greg Schott, CEO Bernard Huger, CFO	Orbitz Barney Harford, CEO Mike Randolfi, CFO
9:20	Clear Channel Communications Rich Bressler, President & CFO	Brightcove David Mendels, CEO Christopher Menard, CFO	Illumina Jay Flatley, CEO	InvenSense Behrooz Abdi, CEO Alan Krock, CFO	Avaya Dave Vellequette, CFO	Good Technology Christy Wyatt, CEO	
9:55		TiVo Naveen Chopra, CFO	athenahealth Timothy Adams, CFO	Qualys Philippe Courtot, Chairman & CEO	Microsemi Steve Litchfield, CSO Robert Adams, VP of Corp. Development	Plex Systems Jason Blessing, CEO	Rambus Ronald Black, CEO Satish Rishi, CFO
10:30		Solazyme Tyler Painter, CFO	Infoblox Robert Thomas, CEO Remo Canessa, CFO	Infusionsoft Clate Mask, CEO	Synaptics Kathy Bayless, CFO		