

11th Annual Global Healthcare Executive Summit

Agenda

Lunch & Check In

11:30 AM – 12:30 PM **Lunch & Check-In**
Buffet Lunch (Ballroom/Lounge)

Speakers & Panelists

12:30 PM – 12:55 PM **Welcome & Introduction: State of Our Global Platform**
Banks Bourne (Chief Executive Officer, Bourne Partners)

1:00 PM – 1:25 PM **Capital Markets Update**
Jeremy Johnson (Senior Managing Director & Head of Investment Banking, Bourne Partners)

1:30 PM – 1:55 PM **Strategic Capital Update**
Minor Hinson (Senior Managing Director, Head of Private Equity & Chief Investment Officer Bourne Partners Strategic Capital)

2:00 PM – 2:45 PM **Networking Break #1**

2:45 PM – 3:30 PM **Prioritizing for Success as a CDMO**
Tom Thorpe (Chief Executive Officer, Afton Scientific)
Eric Edwards (Co-Founder & Chief Executive Officer, Phlow Corporation)
Adam Levitt (Chief Executive Officer, American Injectables)
Moderator: Todd Bokus (Director, Bourne Partners)

3:35 PM – 4:05 PM **Aging & Longevity: How to Maximize Your Healthspan**
Dr. Carlos Jorge (Chief Medical Officer and Co-Founder, Companion Health)

4:10 PM – 4:55 PM **Networking Break #2**

5:00 PM – 5:45 PM **Trial and Error: Navigating Innovation in Clinical Trials and Patient Engagement**
Jim Murphy (Chief Executive Officer, Greenphire)
Tim Schroeder (Chief Executive Officer, CTI Clinical Trial and Consulting Services)
Cassandra Erato (Chief Executive Officer, Spaulding Clinical)
Tom Rhoads (Chief Executive Officer, Spencer Health Solutions)
Moderator: Jake Curtis (Bourne Partners)

5:50 PM – 6:30 PM **Value Creation 101: A Fireside Chat with Patrick Walsh and Banks Bourne**
Banks Bourne (Chief Executive Officer, Bourne Partners)
Patrick Walsh (Chief Executive Officer, Alcami Corporation)

Reception

6:30 PM – 7:30 PM **Networking Cocktail Reception**
Pavilion Terrace

11th Annual

Global Healthcare Executive Summit

Speaker Biographies



Banks Bourne

Chief Executive Officer & Founder, Bourne Partners

As Founder and CEO, Banks oversees all business operations and direct investment opportunities at Bourne Partners and Bourne Partners Strategic Capital. Under Banks' leadership, the firm has been party to more than \$10 billion of transactions in the Pharma, Pharma Services and Consumer Healthcare sectors having represented hundreds of closely held / entrepreneur led companies as well as those owned by many of the elite healthcare private equity funds. Banks got his start in healthcare as an early investor in King Pharmaceuticals. He followed that with an investment in commercial stage player Warner Chilcott and invested in / led the majority buyout,

Turnaround, and subsequent sale of the Theramed Corporation headquartered in Canada. More recently, the Bourne Team and other partners co-founded Covis Pharma S.à.r.l. in 2011, successfully helping build the company through numerous product acquisitions and an eventual sale of the majority portion of the assets in 2015 for \$1.2 billion. As an investor, Banks remained involved with Covis which the team rebuilt to over \$100+ million in EBITDA and was sold to Apollo Global Management in 2020. In late 2015 the firm established Phoenix Therapeutics, Inc., a three-year joint venture with The Carlyle Group. Banks is the founder of Tanner Pharma Group, a pharma services company dedicated to providing managed access, commercialization and clinical trials services to patients and partners in more than 100 countries.

Currently, Banks is currently heavily involved in the firms' investments in PAI Pharma, a U.S. leader in generic liquid pharmaceuticals, CadenceRx, a PBM focused in the workers compensation arena and Carlin Consumer Health, a preeminent consumer health and OTC platform. He received a B.A. degree in Business Management from North Carolina State University and an M.B.A. from Wake Forest University. He is a member of Young Presidents Organization (YPO – Gold).

While Banks has derived great satisfaction by offering focused advisory services to, and investing in Pharma, Healthcare, and consumer-oriented companies that need strategic and operational insights; he is even more gratified by knowing that his work has helped companies to improve the health and well-being of patients across the world. He is passionate about providing healthcare and specifically pharmaceuticals to less fortunate patients, as demonstrated by supporting The Bourne Foundation, The Max Foundation and other non-profit organizations. In addition to his passion for a sub-80 round of golf and fresh ski powder, Banks enjoys traveling to new and interesting destinations and spending time with his wife (Molly) and children (Fairbanks and Mary Pope).



Jeremy Johnson

Senior Managing Director & Head of Investment Banking, Bourne Partners

Jeremy has over 20 years of healthcare-focused M&A and private equity experience. He has been with Bourne Partners since 2006 and is part of the core leadership team at the firm. Jeremy currently serves as a Senior Managing Director, overseeing the broker dealer and all Investment Banking activities.

Prior to Bourne Partners, Jeremy was a founding member and Managing Director at Madison Keats, a life sciences strategy and consulting firm. Jeremy began his career at VentureWorx, an Internet incubator. He is a graduate of Georgetown University

where he earned a Bachelor of Arts in Economics.

Outside of work, Jeremy is active in the community. He is a member of Leadership Charlotte and an avid supporter of a few personally important charitable foundations. In addition, he remains highly active with Georgetown and is President of the local alumni club. Jeremy is a native of North Carolina and currently lives in the same neighborhood in south Charlotte where he grew up. He is married to his wife, Jessica, and they have three young children, with whom he is happy to spend most of his free time.



Minor Hinson

Senior Managing Director, Head of Private Equity & Chief Investment Officer, Bourne Partners Strategic Capital

Since starting at Bourne Partners in 2011, Minor has been responsible for direct investment activities and has been very involved in both the Phoenix Therapeutics, Inc. joint venture with The Carlyle Group, as well as with the creation, management, and asset disposition of Covis Pharma S.à.r.l (“Covis”). Minor also served on the U.S. Board of Covis from inception to exit and executed investments in AMRI (now Curia), WellDyne, Novitium, iNova, Millicent Pharma, Cadence RX, American Injectibles as well as various fund investments. Minor also serves on the Boards and leads the

transaction teams on BPSC’s investments in Pharmaceutical Associates Inc. and Carlin Consumer Health.

Over the course of his career, Minor has been involved in over \$10 billion of financial transactions spanning the range of venture investing, private equity, mezzanine and senior debt, project finance debt and equity, cross boarder preferred stock issuances, sell-side, and buy-side M&A transactions (both large cap and middle market), and other corporate finance advisory assignments. Minor began his business career in 1984 in Corporate Banking at NationsBank/Bank of America and became a Senior Relationship Manager in the Baltimore/Washington loan production office before deciding to attend business school in 1990. After an M.B.A. internship in corporate finance at The Coca Cola Company in Atlanta, Minor accepted a position as an Associate at Bowles Hollowell Conner & Company in Charlotte. Minor returned to Bank of America in 2002 to join the Strategic Investment Group, a group he eventually managed. He was then recruited to manage Corporate Development for the bank’s Global Treasury Services (\$4 billion in profit).

In 2007, Minor accepted a position to join Christofferson Robb & Company to raise capital and work on the initial London project team of the firm’s 300 MW offshore wind farm (Thanet Offshore Wind Limited) which, when opened, was the world’s largest offshore wind project. Minor received a B.A. in Economics from Davidson College in 1984, as well as an M.B.A. (honor society) in 1992 from The Kenan-Flagler Business School at UNC Chapel Hill. Most importantly, Minor has been married to his wife Tiffany over 24 years and is the father of two Children – Minor (college) and Sara Frances (high school).



Tom Thorpe

Chief Executive Officer, Afton Scientific

Mr. Thorpe has 40 years of professional experience in pharmaceutical operations, entrepreneurial initiatives, and investment banking. He is currently the Chief Executive Officer of Afton Scientific Corporation, a cGMP contract manufacturer of sterile drugs and products for use in new drug development and FDA approved commercial drug production. Afton Scientific is also the world's premier provider of pre-sterilized (Ready-to-Use®) vials and components for cGMP aseptic processing.

He serves as Board member and Executive Committee member of the Pharmaceutical and Bio-Pharmaceutical Outsourcing Association (BPOA). In this capacity, he participated on the Industry-FDA negotiation team for the 2017 Generic Drug User Fee Act (GDUFA). He has served as Board Chair of the Virginia Biotechnology Association (Virginia Bio) a statewide non-profit organization that promotes the scientific and economic impact of the life sciences industry in the Commonwealth of Virginia.

Mr. Thorpe is also a board member of Contraline LLC, a biotechnology company developing a novel male contraceptive. He holds a BS degree in Chemical Engineering from the University of Connecticut and an MBA from the University of Virginia. Tom lives in Charlottesville, Virginia with his wife, Cheryl and still enjoys getting knocked around playing ice hockey and lacrosse.



Eric Edwards

Co-Founder & Chief Executive Officer, Phlow

Dr. Eric Edwards is co-founder and chief executive officer of Phlow Corp., a pioneering public benefit pharmaceutical corporation. As Chief Executive Officer, Dr. Edwards has assembled a world-class team committed to not only providing a solution to the broken essential medicines supply chain and over-reliance on foreign manufacturers for our Nation's highest priority medicines, but also driving forward cutting-edge, advanced development and manufacturing processes.

Dr. Edwards was previously co-founder of Kaléo, Inc. a pharmaceutical company in Richmond, VA. During his 16 years at Kaléo, he held several executive management positions including Chief Science Officer where he was responsible for overall scientific strategy and all pharmaceutical development programs; Chief Medical Officer responsible for developing a medical affairs team and capability while operationalizing the Company's clinical program strategy; and Vice President – Innovation, overseeing Kaleo's research and development pipeline and overall new product strategy.

Dr. Edwards is the co-inventor of multiple marketed products, including AUVI-Q, epinephrine auto-injector for the treatment of allergic emergencies (anaphylaxis), is named on over 215 issued and patent-pending applications, and is a published author on numerous scientific publications.

Dr. Edwards also continues to serve his community by volunteering on a local rescue squad, including responding to 911 calls and training paramedics in pre-hospital emergency care. Dr. Edwards obtained his B.S. in Biology, Ph.D. in the Pharmaceutical Sciences, and Doctor of Medicine degrees at Virginia Commonwealth University/Medical College of Virginia.



Adam Levitt

Chief Executive Officer, American Injectables

With over twenty-five years of experience in leading and scaling up the businesses for commercial success, Adam's experience and expertise encompasses product launches, building sales and marketing capabilities, and extensive business development experience. Adam has forged global commercial partnerships and is an industry leader in creating a successful business platform for CMOs and suppliers as the CEO of Strides, N.A, CEO of Shilpa, NA, EVP/GM Perrigo Generics and as Global Sr. VP Commercial Operations of Teva Pharmaceuticals. Regarded for his ability to forge strong partnerships, Adam is recognized for the strategic alliances and partnerships

he has built globally. Adam brings a strategic, yet pragmatic focus as an executive, and is known as being a "builder" and leader of profitable businesses that unlock long term value.



Todd Bokus

Director, Bourne Partners

Todd joined Bourne Partners as an Analyst in 2007. Throughout his tenure with the firm, he has worked across all facets of its business activities. Currently he is responsible for sourcing and executing the firm's investment banking initiatives within its Pharma Services practice. Todd received a B.S. in Business Administration with a concentration in Finance and a Minor in Economics from the University of North Carolina at Charlotte. Outside of work Todd enjoys spending time with his wife, Leah, and their daughter, Andie.



Dr. Carlos Jorge

Chief Medical Officer & Co-Founder, Companion Health

Carlos Jorge, MD, has been in healthcare for over 20 years and is the only physician in Charlotte triple board certified in family medicine, lipidology, and functional medicine & anti-aging. Carlos is committed to helping clients improve their well-being by taking a holistic approach to their care. Carlos has worked for both of Charlotte's major healthcare systems, Carolinas Healthcare System (now Atrium) and Novant Health. While at Novant, Carlos helped create Novant's corporate wellness, executive health, and heart & wellness programs.

From 2011-2019, Carlos practiced medicine as a physician co-owner of the independent family medicine practice, Ballantyne Medical Associates. In May 2019, Carlos left Ballantyne Medical Associates to start a new clinic, Companion Health. Dissatisfied with the high-volume, insurance-based model of "sick care," Carlos, along with business partner and wife Nathalie Simmons Jorge, created Companion Health to reconnect with true medicine, deliver world-class care, and help clients achieve the health and wellness they deserve.

Carlos is a graduate of Universidad Nacional Pedro Henriquez Santo Domingo Urena School of Medicine and the University of Virginia. He is bilingual in Spanish and a lifelong learner. When he is not seeing patients, he enjoys listening to music, exercising, traveling, cooking, reading, and spending time with his family.



Jim Murphy

Chief Executive Officer, Greenphire

As Greenphire’s Chief Executive Officer, Jim leads the strategy for the company, including client satisfaction, business operations, commercial execution, and financial performance. He is committed to fostering a culture of growth, innovation, excellence, and employee satisfaction. Jim has focused his career on building innovative eClinical software companies to address challenges and unmet needs within the global clinical research ecosystem. Prior to joining Greenphire, Jim most recently served as the president and managing director of Almac Clinical Technologies, where he was responsible for strategic, financial, and operational

leadership. While at Almac, Jim also served as the president and managing director of Almac Pharmaceutical Services – Asia, where he established and managed the Almac Group’s Asia Pacific organizations and business operations across all solution areas. Jim earned a Bachelor of Science in Biochemistry and a Master of Science in Molecular Biology from the University of California at Santa Barbara. Jim resides in the Philadelphia area with his wife and three children. He has a keen interest in travel, cycling, and water sports.



Tim Schroeder

Chief Executive Officer, CTI

Timothy Schroeder, Chairman, Chief Executive Officer, and Founder of CTI has over 35 years of clinical, academic, and industry experience in global drug and device development programs. Prior to founding CTI, Tim held numerous faculty positions with the University of Cincinnati College of Medicine. He was also the founding Executive Vice President of Clinical Development at SangStat Medical Corporation, which went public in 1995. Tim is currently a board member for over a dozen corporate and non-profit organizations, including Xavier University, which he attended.



Cassandra Erato

Chief Executive Officer, Spaulding Clinical

Cassandra Erato’s comprehensive knowledge of Spaulding Clinical’s business and client base is driven by her depth of experience with the company — she joined at its inception in 2007 and was named Chief Executive Officer in 2020. She was previously in charge of all facets of daily operations as COO, and before that, director of clinical and biometrics operations, where she was responsible for study unit activities as well as back-end data management services related to the conduct of Spaulding’s clinical trials. She is a Nurse Practitioner with degrees in nursing from Marquette University.



Tom Rhoads

Chief Executive Officer, Spencer Health Solutions

Tom Rhoads, MBA, has been leading the development and launch of healthcare technology for 25 years. As founder and Chief Executive Officer of Spencer Health Solutions, he led the development of the direct-to-patient spencer® medication dispensing, telehealth, and in-home monitoring platform. Prior to his current role, Rhoads was Chief Executive Officer of Parata Systems pharmacy automation company, and previously held leadership roles at Baxter Healthcare and Cardinal Health Corporation. He is a member of the Advisory Panel Member for the Centers for Medicare and Medicaid Innovation (CMMI) Services, Payment and Program Evaluation grant in North Carolina.



Jake Curtis

Associate, Bourne Partners

Jake joined Bourne Partners in 2022 as an Associate and provides transaction execution support on a variety of M&A transactions across the Pharma Services sector.

Before joining the team, Jake was a Senior Analyst at Crosstree Capital Partners, working in the Pharma Services group. Jake began his career with Bourne Partners when he joined the firm as an intern in 2019. He graduated from the University of North Carolina at Charlotte with a B.S. in Finance.



Patrick Walsh

Chief Executive Officer, Alcami Corporation

Pat Walsh has been CEO of six high growth organizations over the course of a distinguished 40-year career in the pharmaceutical industry. Prior to Alcami, he was co-founder and CEO of TriPharm Services, a parenteral manufacturing business acquired by Alcami. From 2015 to 2019, Mr. Walsh was the CEO of Avista Pharma Solutions, a PE-backed CDMO acquired by Cambrex. Pat was named CEO of PE-backed AAI Pharma Services in 2010 and led the company through an impressive growth trajectory, culminating in the sale of the company in 2014. Prior executive roles also include CEO of Kadmus Pharma (acquired by Organon) and President

and COO of Gensia-Sicor (acquired by Teva) and VP of Sales & Marketing at Fujisawa.

In addition to his duties as Chairman of the Board at Alcami, Pat serves as Chairman of the Board of ANI Pharmaceuticals (NASDAQ: ANIP) and an independent director of private equity backed ICE Pharma based in Milan Italy. Pat also serves as an Operating Partner at healthcare PE firm Ampersand Capital. Prior board of director roles include Chairman of Brammer Bio, a director at Landec Corp (NASDAQ: LNDC), MedPharm Ltd, Avid BioServices (NASDAQ: CDMO) and numerous other pharma and biotechnology companies over the course of his career.