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Welcome to the 3PL Value Creation North America Summit 2022

Welcome to the tenth annual Armstrong & Associates 3PL Value Creation North America Summit.

At this year's event you will gain a global view of the third-party logistics industry and mega-trends shaping its landscape. Our incredible lineup of panelists includes 3PL executives, technology innovators, and investment community leaders.

On Wednesday, we'll set the stage with an overview of global and regional 3PL trends before exploring logistics M&A dynamics and 3PL market insights. We'll close the day with an insightful discussion about information technology digitalizing the supply chain industry and host a welcome reception.

On Thursday, we will open with the keys to driving stronger shipper/3PL relationships and close the day with executive trends and predictions for 2023 and beyond.

As always, we hope you find the discussions engaging and insightful. We're excited for you to explore opportunities for value creation during panel discussions and as you exchange knowledge and network with your best-in-class peers.

Kind regards,

Armstrong & Associates Team

WEDNESDAY, OCTOBER 12

7:00 - 7:55 a.m.

Registration and Networking in Exhibitor Space

8:00 - 8:25 a.m.

Welcome and Global 3PL Market Overview

Evan Armstrong, President & CEO, Armstrong & Associates, Inc.

8:30 - 9:25 a.m.

Global 3PL View and Regional Variations

Moderator: Evan Armstrong, President & CEO,

Armstrong & Associates, Inc.

PANELISTS Raziel Bravo

SVP Strategic Management, GEODIS

Tom Nightingale

Chief Executive Officer, AFS Logistics

Kevin Sterling

Senior Market Strategist, XPO Logistics

9:30 - 10:25 a.m.

Private Equity Perspectives

Moderator: Richard Armstrong, Chairman,

Armstrong & Associates, Inc.

PANELISTS

John Anderson

Operating Partner, Greenbriar Equity Group

Anthony Cardona

Principal-Services, Pritzker Private Capital

Alex Rafla

Principal, Clarendon Capital

10:25 - 10:45 a.m.

Networking Break in Exhibitor Space

WEDNESDAY, OCTOBER 12 (CONTINUED)

10:45 - 11:40 a.m.

E-Commerce as a 3PL Growth Engine

Moderator: Kurt Baumann, Vice President,

Armstrong & Associates, Inc.

PANELISTS

Thom Campbell

Chief Strategy Officer,

Capacity LLC

Karen Erickson

VP, Business Operations,

a2b Fullfillment, Inc.

Don Staniszewski

Past President and Founder,

National Home Delivery Association

11:45 - 12:40 p.m.

Digital Freight Matching & Freight Brokerage Automation

Moderator: Evan Armstrong, President & CEO,

Armstrong & Associates, Inc.

<u>PANELISTS</u>

Kary Jablonski

Chief Executive Officer,

Trucker Tools

Scott Sandager

Chief of Staff,

Arrive Logistics
Lindsay Watt

VP of Product.

Parade

12:40 - 1:50 p.m.

Group Luncheon / Networking Sponsored by Ernst and Young



PIPER SANDLER

Leadership in Advising High-Growth Logistics Companies

Piper Sandler Transportation & Logistics Investment Banking

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Learn more at PiperSandler.com

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BMO Capital Markets is proud to announce the addition of Kristopher Hopkins as Managing Director, Head of Transportation & Logistics Investment Banking.

Kris and his team bring deep industry knowledge and long-standing relationships to provide clients with an extensive range of debt and equity capital markets and M&A advisory services.



Let's connect

Kris Hopkins

718-619-5058 | kristopher.hopkins@bmo.com

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WEDNESDAY, OCTOBER 12 (CONTINUED)

1:50 - 2:40 p.m.

3PL Market M&A Insights and Trends

Moderator: Evan Armstrong, President & CEO, Armstrong & Associates, Inc.

PANELISTS

Kris Hopkins

Managing Director, BMO Capital Markets

Steve Hull

Managing Director, Piper Sandler & Co.

Paul Jones

Managing Director. STIFEL

Hugh Rabb,

Managing Director, Global Co-Head, Jefferies Group

2:45 - 3:35 p.m.

Emerging Trends in International Transportation Management/Freight Forwarding

Moderator: Mark Szakonyi, JOC Executive Editor,

S&P Global Market Intelligence

PANELISTS

Vaughn Moore

Executive Chairman & CEO, AIT Worldwide Logistics

David Ross

Chief Strategy Officer, Ascent

David Sutton

Chairman, CLN Worldwide

3:40 - 4:30 p.m.

What's Next in Logistics Technology?

Moderator: Evan Armstrong, President & CEO.

Armstrong & Associates, Inc.

PANELISTS

Erhan Musaoglu

CEO & Founder, Logiwa

Dawn Salvucci-Favier

CEO & Chief Product Officer, Greenscreens Al

Chadd Olesen

CEO, AVRL

4:30 - 5:30 p.m.

Summit Networking Reception Sponsored by Logiwa



Say Hi to Our Team Attending the Armstrong 3PL Summit!



Ron Lentz Managing Partner



Cris Arens Managing Partner



Nikhil Sathe Managing Director



Matt Laskowski Buy-Side Manager



Marijan Ljubic Engagement Manager

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THURSDAY, OCTOBER 13

7:30 - 8:30 a.m.

Registration and Networking in Exhibitor Space

8:30 - 9:20 a.m.

The Keys to Driving Stronger Shipper - 3PL Relationships

Moderator: Cheri Grabowski, Manager,

Armstrong & Associates, Inc.

PANELISTS

Mike Grayson

EVP, Worldwide Express/Unishippers/Globaltranz

Joe Maslanka

VP, Fleet Solutions, Coyote Logistics

Christina Ryan

EVP, Managed Services, Redwood Logistics

Duane Sizemore

SVP, Marketing & Business Development,

Saddle Creek Logistics Services

9:25 - 10:20 a.m.

Developing Trends in Value-Added Warehousing and Distribution

Moderator: Karen Erickson, Vice President,

Armstrong & Associates, Inc.

PANELISTS

Joe Dunlap

Managing Director, CBRE

Elijah Ray

Chief Customer Officer, Sunland Logistics Solutions

Sean Kelly

SVP, Business Development, GEODIS

10:20 - 10:45 a.m.

Networking / Private Meetings in Exhibitor Space

THURSDAY, OCTOBER 13 (CONTINUED)

10:45 - 11:40 a.m.

Strategic and Financial Buyer Acquistion Perspectives

Moderator: Evan Armstrong, President & CEO,

Armstrong & Associates, Inc.

PANELISTS

Ron Chang

Managing Director, Wofford Advisors

Michael Daly

Senior Vice President, Hub Group

Rob Levin

Managing Director, Republic Partners

Alex Yeager

SVP, M&A and Ventures, Redwood Logistics

11:40 - 12:50 p.m.

Group Luncheon/Networking Sponsored by Ernst and Young



12:50 - 1:55 p.m.

What's New in Domestic Transportation Management?

Moderator: Anne Reinke, President & CEO, Transportation Intermediaries Association

PANELISTS

Brittany Bemben

VP, Digital Freight Management, BNSF Logistics

Abtin Hamidi

Founder & CEO, Torch

Michael Kroul

Managing Director, KTI LLC

Brad Nuffer

SVP, Transportation Operations, CJ Logistics



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2021-2022 Transactions



Selected Prior Transactions*

CPG Warehousing





G HOLIBBIES \$454 Million

Domestic Parcel / BPO ups

Warehousing NEOVIA Sale to \$1.0+ Billion

APL Logistics CARMICHAEL Not Disclosed ups

Acquisition of \$1.8 Billion

Domestic TLB

Acquisition of JACOBSON COMPANIES \$750 Million \$513 Million

\$220 Million

International Freight Forwarding

Not Disclosed

Source: Dealogic Includes transactions executed at prior firms

Contact Us:

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Ron Chang | Managing Director rchang@woffordadvisors.com

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THURSDAY, OCTOBER 13

2:00 - 2:55 p.m.

Summarizing the M&A Landscape - New Headwinds and Tailwinds

Moderator: Evan Armstrong, President & CEO,

Armstrong & Associates, Inc.

PANELISTS

Ryan Cech

VP, Corporate Strategy & Development, Magnate Worldwide

Eric Heath

Senior Vice President, The Tenney Group

Nikhil Sathe

Managing Director, Logisyn Advisors

3:00 - 4:00 p.m.

Executive Outlook, 3PL Market Trends & Predictions

Moderator: Evan Armstrong, President & CEO,

Armstrong & Associates, Inc.

PANELISTS

Sean Coakley

Chief Commercial Officer, Capstone Logistics

Chris Pickett

Chief Strategy Officer, Flock Freight

Rich Piontek

Chief Executive Officer, Direct Connect Logistix, Inc.

Doug Waggoner

Chief Executive Officer, Echo Global Logistics

