

2025

Defense & Government Conference

Innovation, Mission, and Capital Market Convergence

Tuesday, November 18

In-Person & Virtual | The Ritz-Carlton, Tysons Corner

BAIRD

Tuesday, November 18 *(all times are in Eastern Time)*

7:00 AM	Registration & Breakfast; Salon Foyer, 5th Floor			
	General Sessions Salons I, II & III, 5th Floor			
8:00 - 8:10 AM	Opening Remarks John Song, Managing Director, Baird			
8:10 - 8:40 AM	Baird's Defense & Government State of the Market Update John Song, Managing Director, Baird Jean Stack, Managing Director, Baird			
8:40 - 9:10 AM	Restoring the Arsenal of Democracy: Rebuilding the Defense Industrial Base Amidst Political & Fiscal Disruption Daniel Clifton, Partner & Head of Policy Research, Strategas Moderated by: Jean Stack, Managing Director, Baird			
9:10 - 9:30 AM	BREAK			
	Session I Salon I, 5th Floor	Session II Salon II, 5th Floor		Company Presentation Track Salon III, 5th Floor
9:30 - 10:20 AM	Insights - Government Perspectives on National Security Space Mikhail Grinberg, Partner, Renaissance Strategic Advisors Government Perspectives on National Security Space Bill Adkins, Professional Staff Member, Defense Appropriations Subcommittee, U.S. House of Representatives Todd Harrison, Senior Fellow, American Enterprise Institute Col. Brendan Hochstein, Commander, System Delta 89, Space Combat Power, U.S. Space Force Matt O'Kane, Managing Director, Cerberus Trey Treadwell, Associate Director, Capabilities, National Geospatial-Intelligence Agency Moderated by: Joe Dodd, Chairman, National Security Space Association	The Emerging "New" Primes Church Hutton, Chief Growth Officer, AV Diem Salmon, Vice President, Air Dominance & Strike, Anduril David Spirk, Senior Counselor, Palantir Brandon Tseng, Co-Founder & President, Shield AI Moderated by: John Song, Managing Director, Baird	9:30 - 9:55 AM	Parry Labs John (JD) Parkes, Chief Executive Officer, Co-Founder & Board Member Moderated by: Nicole Coffey, Managing Director, Baird
10:25 - 11:05 AM	Acquisition Reform: Are We There Yet? Patrick George, Senior Advisor to the Assistant Secretary of the Navy for Research, Development, and Acquisition, U.S. Navy Dr. Jerry McGinn, Director, Center for the Industrial Base, CSIS Dr. Matthew Willis, Director, U.S. Army FUZE Moderated by: Jennifer Swanson, Vice President, Digital & Next-Gen Solutions, Cypress International and Former Deputy Assistant Secretary, Data, Engineering & Software, U.S. Army	VC Investing in Defense Disruption James Cross, Co-Head, Private Investing, Franklin Templeton Mina Faltas, Founder & Chief Investment Officer, Washington Harbour Partners Ken Gonzalez, Managing Director, NightDragon Chris Morales, Partner, Point72 Ventures Moderated by: Michelle Volz, Founder & Managing Partner, Pax VC	10:00 - 10:25 AM	Epiq Solutions John Orlando, Co-Founder & Chief Executive Officer
11:10 - 11:50 AM	European Defense: The Force Awakens Heather Armentrout, President & General Manager, Kongsberg Michael Brasseur, Vice President & Chief Strategy Officer, Saab, Inc. Jacob Markish, Vice President, Strategy, Marketing & Corporate Development, Thales Dr. Jennifer McArdle, U.S. Director, Helsing Inc. Moderated by: Becca Wasser, Defense Lead, Bloomberg Economics	The Fast and the Furious: IPOs Justin Holsen, Managing Director, Baird Equity Capital Markets Kirk Konert, Managing Partner, AE Industrial Partners Christopher J. Purtill, Managing Director, Solebury Capital Moderated by: Jean Stack, Managing Director, Baird	10:30 - 10:55 AM	Raft Shubhi Mishra, Founder & Chief Executive Officer Moderated by: Jean Stack, Managing Director, Baird
11:50 AM - 12:20 PM			11:00 - 11:25 AM	Echodyne Eben Frankenberg, President & Chief Executive Officer Moderated by: Peter Arment, Senior Research Analyst, Aerospace & Defense, Baird
			11:30 - 11:55 AM	Platform Aerospace Kurt Parsons, Chief Executive Officer
11:50 AM - 12:20 PM	Lunch, Salon Foyer, 5th Floor			
	General Sessions Salons I, II & III, 5th Floor			
12:20 - 12:50 PM	Risk vs. Reward Alternatives in an Age of Government Innovation and Transformation Tim Garnett, Partner & Head of Aerospace and Defense, Americas, Oliver Wyman			
12:50 - 1:20 PM	A View from Wall Street: Perspectives from Baird's Leading Aerospace & Defense Equity Research Analyst Peter Arment, Senior Research Analyst, Aerospace & Defense, Baird			
1:20 - 1:30 PM	BREAK			
	Session I Salon I, 5th Floor	Session II Salon II, 5th Floor		Company Presentation Track Salon III, 5th Floor
1:30 - 2:10 PM	Seller Perspectives: M&A Lessons Learned Mike Frantzen, Founder & Chief Executive Officer, Kudu Dynamics Bill Gattle, Chairman of the Board, Trident Solutions James Lisowski, Chief Executive Officer, SoTec Moderated by: Jonathan Kirkland, Managing Director, Baird	Cyber and SIGINT and EW, Oh My! John Baylouny, Chief Operating Officer and President & Chief Executive Officer-Elect, Leonardo DRS Dr. Bill Conley, Chief Technology Officer, Mercury Matthew Culp, Senior Program Strategist, Vannevar Labs Jeff Logan, Vice President, Strategy & Innovation, Epirus Dr. Abir Ray, Chief Executive Officer & Chief Technology Officer, Expression Moderated by: Bryan Clark, Senior Fellow & Director, Center for Defense Concepts and Technology, Hudson Institute	1:30 - 1:55 PM	RealmOne Gary Daigle, Chief Executive Officer Matt Ford, President Ray Williams, Executive Vice President, Corporate Development Moderated by: John Song, Managing Director, Baird
2:15 - 2:55 PM	Market Perspectives from Defense Leaders Dan Gittsovich, Vice President, Investor Relations, Strategy & Corporate Development, L3Harris Jesse Klemper, Senior Vice President, Corporate Strategy & Development, RTX Bruce Stephenson, Vice President, Corporate Strategy & Technology, Northrop Grumman Moderated by: Frank Finelli, Senior Advisor, Carlyle	Private Equity: The Evolving Landscape of Investing in Defense & Government Craig Brooks, Senior Managing Director, Cerberus Mike Kramer, Partner, ATL Peter Manos, Managing Partner, Arlington Capital Partners Moderated by: Les Cheek, Managing Director, Head of Global Financial Sponsors Group, Baird	2:00 - 2:25 PM	Oceaneering Roderick (Rod) Larson, President & Chief Executive Officer
3:00 - 3:50 PM	Insights - The Future of Autonomous Maritime Aaron Myers, Partner, Aerospace, Defense & Government Advisory, Aprio The Future of Autonomous Maritime Dave Cascelenda, Director, Corporate Development, Saronic J. Van Gurley, President & Chief Executive Officer, Metron Bill Merz, Senior Vice President, Aerospace & Defense Technologies, Oceaneering Dr. Andrew Nuss, Head of Growth & Strategy, Maritime Division, Anduril Moderated by: Capt. Colin Corridan, Former Acting Director, Disruptive Capabilities Office, U.S. Navy	"New Space" Disruptors Kylie Ho, Senior Director, Strategy, Blue Origin Dan Jablonsky, Chairman & Chief Executive Officer, Ursa Major John Serafini, Chief Executive Officer, Hawkeye 360 Michael Sheetz, Director, Investor Relations, Firefly Moderated by: Mo Islam, Co-Founder & Chief Executive Officer, Arkaea	2:30 - 2:55 PM	KBR Mark Sopp, Executive Vice President & Chief Financial Officer Gabe Camarillo, Senior Vice President, Defense Technology Solutions Jay Lennon, Senior Vice President, National Security Solutions
3:55 - 4:35 PM	Transforming Warfighting: DefenseTech Disruption Josh Araujo, Chief Executive Officer, Forterna Tony Frazier, Chief Executive Officer, LeoLabs Even Rogers, Co-Founder & Chief Executive Officer, True Anomaly Tyler Sweatt, Chief Executive Officer & Chairman, Second Front Systems Moderated by: Chris Donaghey, President & Chief Executive Officer, Applied Energetics	AI in Action: Impact on the Battlefield Susan Davenport, Chief Digital & Artificial Intelligence Officer, Department of the Air Force Justin Fanelli, Chief Technology Officer, U.S. Navy Stuart Wagner, Chief Digital & Artificial Intelligence Officer, U.S. Navy Moderated by: Vivek Chilukuri, Senior Fellow & Director, Center for a New American Security		
4:35 - 4:50 PM	BREAK			
4:50 - 5:30 PM	The Reality of AI Today: Perspectives from Technology Leaders Joel Minton, Founding Chief Technology Officer, Google Public Sector Katrina Mulligan, Head of National Security Partnerships, OpenAI Thiyagu Ramasamy, Head of Global Public Sector, Anthropic Moderated by: Josh Marcuse, Director of Strategic Initiatives, Google Public Sector			
5:30 - 7:00 PM	Reception; Salon Foyer, 5th Floor			

NOTE: schedule subject to change