

Emerging Leaders of Gaming Webinar Series

Sports Betting: *Opportunities Inside & Out of Nevada*

Please Stand by

Webinar will begin at 1:00PM EDT

Presented by:



Brief Technical Overview



Marie Casias

Manager, Marketing & Administration

The Innovation Group

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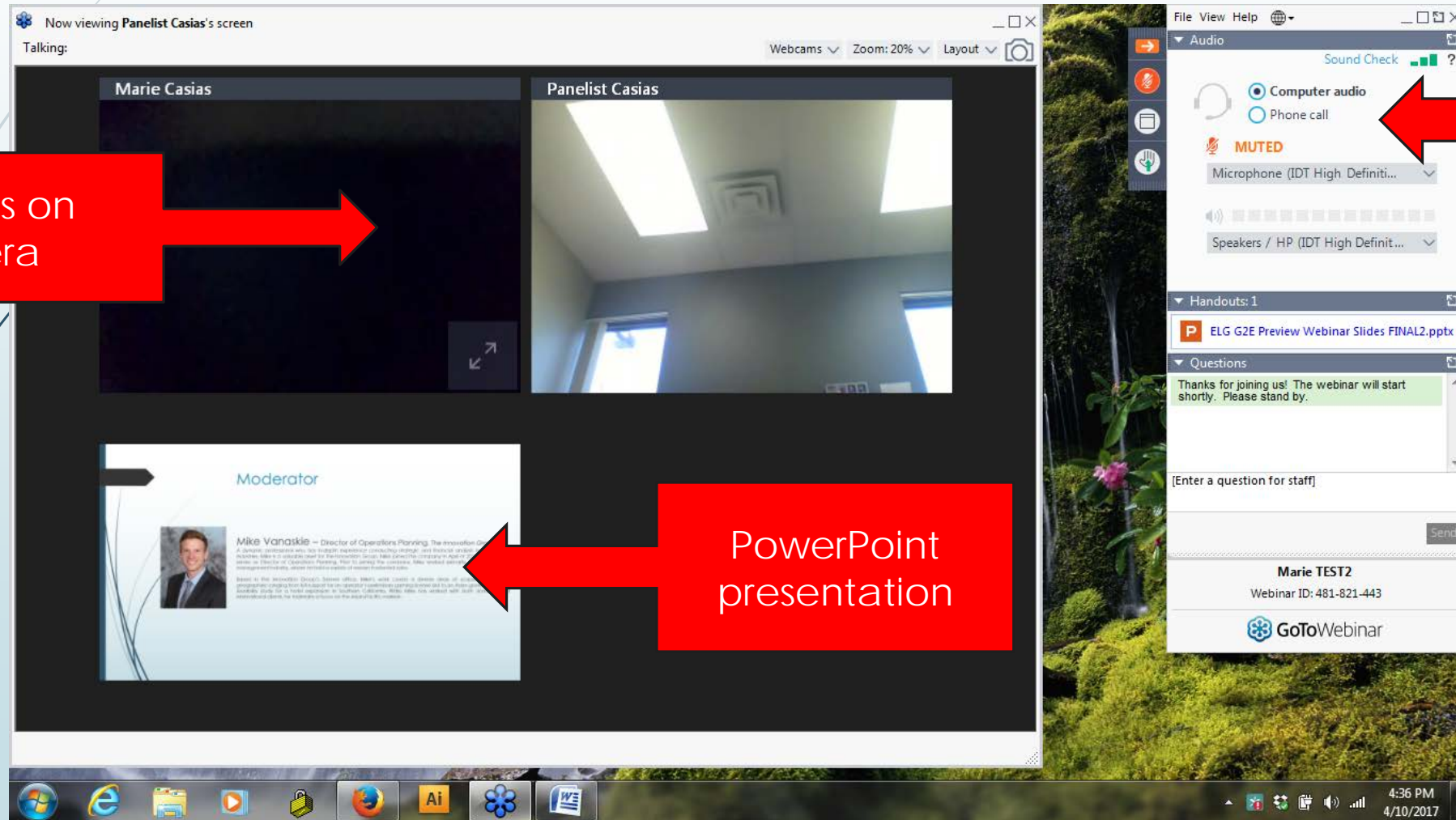
Windows & Control Panel

- Once we are broadcasting, your screen should show the panelists' camera windows and a PowerPoint presentation window, as well as the control panel on the right.

panelists on camera

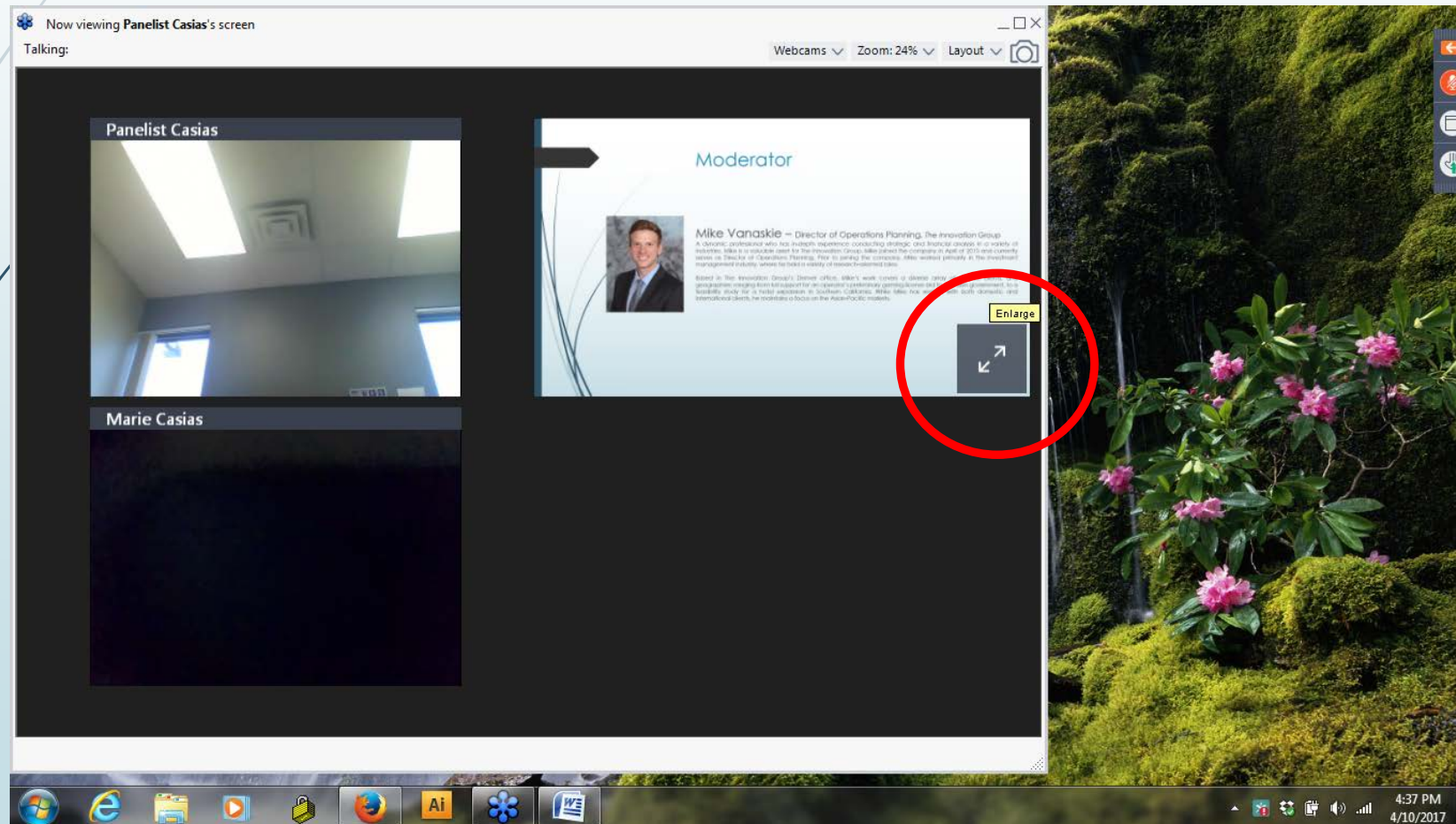
PowerPoint presentation

control panel



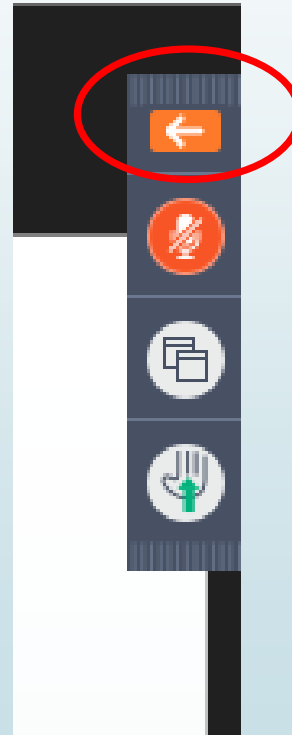
Expanding Windows to Full-Screen

- Hover over the bottom right corner of any window and you'll see the "enlarge" option with two pointing arrows. Click on that, and you'll go to full-screen for that window. To get out of full-screen, hit ESC or the double arrows again.



Minimize/Maximize Control Panel

- ▶ Your control panel starts in an automatically maximized setup but you can minimize it by clicking the orange arrow at the top.



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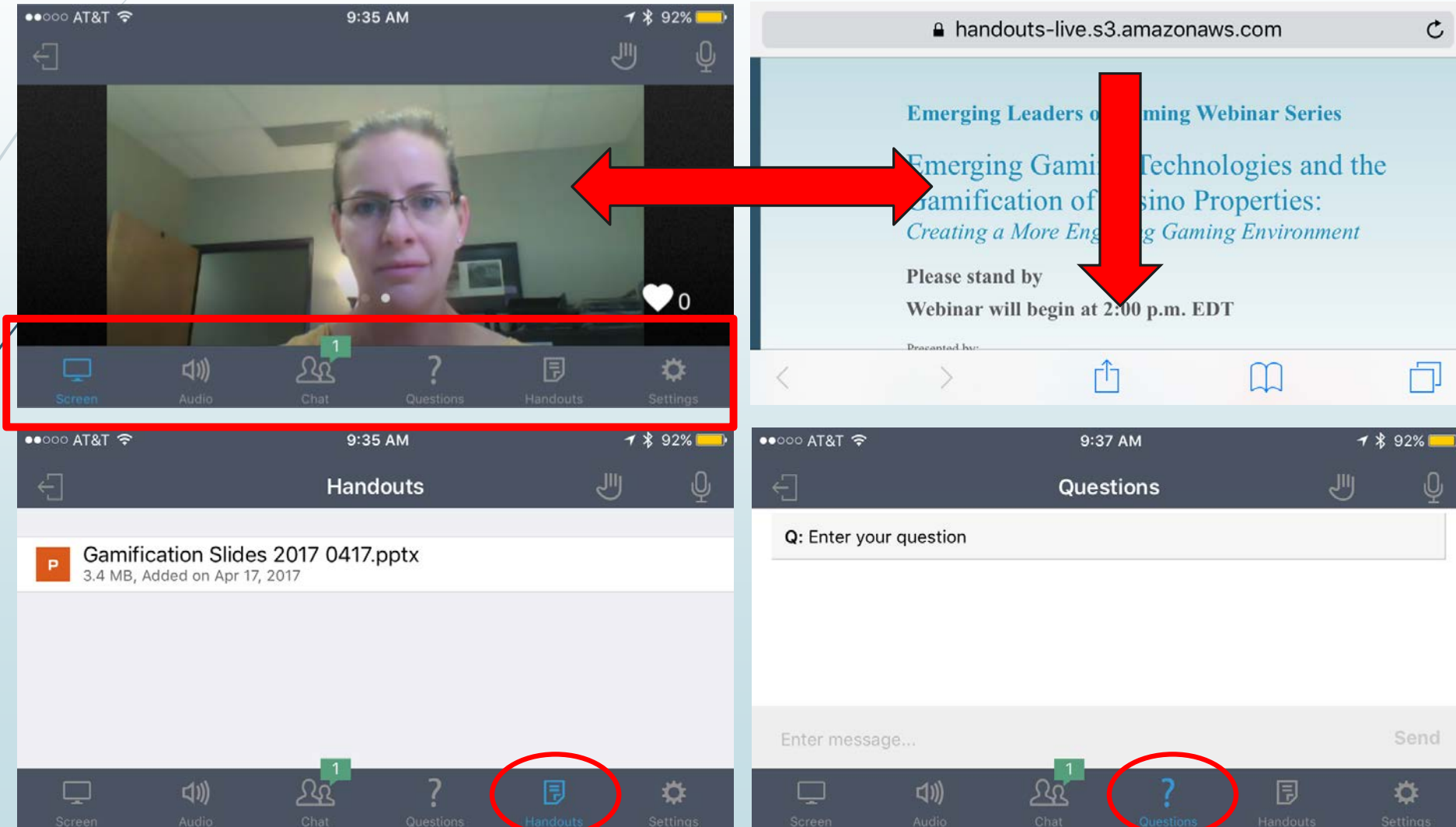
Ask a Question

- ▶ We will reserve 10 minutes at the end of the webinar to field questions. Please make sure your control panel is maximized and type yours into the "Questions" field towards the bottom, then hit SEND.

The screenshot displays a webinar control panel with several sections. At the top is the 'Audio' section, which includes a 'Sound Check' indicator and options for 'Computer audio' (selected) and 'Phone call'. Below this is a 'MUTED' status for the microphone and a volume slider. The 'Handouts: 1' section shows a presentation titled 'ELG-G2E Preview Webinar Slides FINAL2.pptx'. The 'Questions' section is highlighted with a red box and contains a green message: 'Thanks for joining us! The webinar will start shortly. Please stand by.' Below the message is a text input field with the placeholder text 'Type your question here and hit "send".' and a 'Send' button. At the bottom of the panel, the user's name 'Marie TEST2' and 'Webinar ID: 481-821-443' are displayed, along with the 'GoToWebinar' logo.

Attending via Mobile Phone?

- Your menus are at the bottom. Toggle between cameras and the presentation ("handout") by swiping left & right. Continue through the presentation by swiping down. Although you won't be able to see our live presentation, you can follow along at your own speed in the "handouts" section.



Frequently Asked Questions

- **Technical Issues?** Call Customer Service at 877-582-7011 (or internationally, +1 805-617-7370)
- A recording of the webinar will be provided within a few weeks of it, and available on our [Emerging Leaders page](#).

Moderator



Mike Vanaskie

Director, Operations Planning

The Innovation Group

mvanaskie@theinnovationgroup.com

A dynamic professional who has in-depth experience conducting strategic and financial analysis in a variety of industries, Mike is a valuable asset for The Innovation Group. Mike joined the company in April of 2015 and currently serves as Director of Operations Planning. Prior to joining the company, Mike worked primarily in the investment management industry, where he held a variety of research-oriented roles.

Based in The Innovation Group's Denver office, Mike's work covers a diverse array of scopes, clients, and geographies; ranging from full support for an operator's preliminary gaming license bid to an Asian government, to a feasibility study for a hotel expansion in Southern California. While Mike has worked with both domestic and international clients, he maintains a focus on the Asian-Pacific markets.

Panelists



Will Green – Senior Director, Research, *American Gaming Association*

Will is the American Gaming Association's Senior Director of Research, focusing in particular on sports betting research, and exploring the potential for a legal, regulated U.S. sports betting market. He previously worked as a reporter and producer at Sports Illustrated, where he covered sports gaming and gambling. He also worked at industry trade publications LegalSportsReport and EsportsBettingReport, where he covered competitive video gaming and virtual currency betting, among other issues. Will lives in Washington, D.C.

wgreen@americangaming.org



Dan Kustelski – Co-founder & CEO, *Chalkline Sports*

Daniel is an experienced gaming executive having operated online gaming on 2 continents. He served as COO of WatchandWager, an online Horse/Harness/Dog wagering site licensed in North Dakota and based in Lexington, Kentucky. Previously, he was MD & Co-founder of a regulated online sports book in South Africa, which was sold to the land based casino group, Sun International, in 2013.

Recently, Daniel has launched Chalkline Sports, a veteran-led data insights company that delivers software as a service solutions to gaming and media companies to increase profitability by automating visualized sports betting data on a mobile content platform in regulated and soon-to-be regulated markets. Dan He earned his MBA from Wits Business School in Johannesburg, South Africa and his undergraduate degree from the United States Military Academy at West Point.

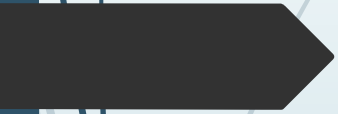
daniel@chalklinesports.com



Dan Shapiro – VP, Strategy & Business Development, *William Hill US*

Dan Shapiro serves as VP of Strategy & Business Development for William Hill US, the largest sports book operator in Nevada. Prior to that role, Dan was Director of Marketing for the first year of William Hill's Nevada operation. Before joining William Hill, Dan was part of the original management team of Brandywine Bookmaking d/b/a Lucky's Race & Sports Book, a startup sports betting company William Hill acquired in 2012. Before moving to Las Vegas, Dan held various roles in the horse racing industry. Dan holds an MBA from UCLA's Anderson School of Management and a BS from Boston University. Dan was named one of the "40 Under 40" emerging leaders in the gaming industry.

dshapiro@williamhill.us



Panelist Questions



What is the state of the sports betting industry within the U.S.?

How does this compare with international jurisdictions?




What is the current size of the domestic sports betting market, both legal and illegal?

What will happen to the size of the market if it becomes legal in more places?



What are the biggest political obstacles facing the sports betting industry in the U.S.?

Would a favorable Supreme Court ruling and the passage or repeal of a federal sports betting law enable widespread implementation?



How much influence do the four major sports leagues have in the future of sports betting within the U.S.?



How can domestic best practices help to frame broader sports betting implementation within the U.S.?



What can potential domestic sports betting operators learn from established international operators?




What benefits does sports betting provide to gaming properties?



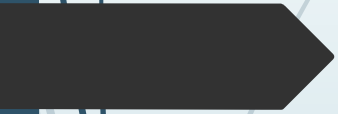
What sports betting related strategies have Nevada and International gaming properties employed to enhance customer acquisition and retention?



What are the biggest risks facing sports betting operators?



Where do you think the domestic sports betting market will be in the next 3 to 5 years and beyond?



Audience Q&A

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FROM VISION TO FRUITION

ABOUT OUR NATIVE AMERICAN INTERNSHIP PROGRAM

CONSIDER THE MOST SUCCESSFUL GAMING AND ENTERTAINMENT DESTINATIONS IN THE WORLD.

Ever wonder how they got that way?

Every destination starts the same way. With an idea. A grand, thrilling, sometimes, dizzying vision of what this development could become. And that vision is only step one. The Innovation Group collaborates with clients to navigate the long, complex and often tricky road from vision to fruition.

Accuracy. Advocacy. Strategy. Success.

We specialize in all things leisure and gaming, all over the world and the web. We provide the insight that drives intelligent decisions. We develop the strategies that lead to enduring success. We help create and operate destinations that surpass the dreams that started them all.

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- Strategic Business Planning
- Marketing & Operations Analysis
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- Legislative & Legal Services
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- Tribal Services & Diversification Strategies
- Site Analysis & Project Development
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