In Conversation...

WITH DREW GUEVARA & JAMES MYLETT

AI Investments. Human Trust. World-Class Execution.

SEPTEMBER 2, 2026

Park James Hotel • Menlo Park, California



Drew Guevara



James Mylett

The AI buildout is moving fast. Turning it into value is a human challenge.

Three connected conversations explored the capital behind AI, the value of trusted relationships, and the people who turn change into operating results.









Rob Swanson
EVP/Managing Director - Specialized Industries

CALIFORNIA BANK & TRUST
ZIONS BANCORPORATION



Andy Grosso
Partner

BUFFKIN / BAKER



David Nour
Founder & CEO

AVNIR

DREW GUEVARA

The AI Investment Equation



Head of Global Technology Investment Banking • Morgan Stanley

The buildout is visible.
The economic return is still taking shape.

Will enterprise adoption create enough value to support the capital going into it?



01 Adoption and Monetization

AI revenue is growing rapidly, while the timing of durable returns on infrastructure investment remains uncertain.

02 Different Economics

Software, chipmakers and infrastructure providers have different capital needs. AI is shifting how value is created and captured across them.

03 The Physical Buildout

Power, data centers, chips and cloud capacity underpin AI's expansion, with effects extending far beyond software.

04 Financing the Expansion

Corporate investment, equity and credit markets are financing an interconnected AI buildout.

05 Constraints on Expansion

Power availability, semiconductor capacity and community opposition shape where and how AI infrastructure expands.

06 Usage Is Not Return

Open-weight models are gaining usage. Turning that growth into durable economic returns remains an open question.

DAVID NOUR'S BRIEF

The New Value of Relationships



Founder • Avnir

Ten hypotheses on relationship capital as AI scales.



Invest where trust matters.
Prioritize strategic relationships by trust, influence and advocacy; not contact-list size.

Build beyond one champion.
Map the people who shape decisions, including hidden influencers and bridges between groups.

Track strength, not activity.
Use AI to spot signals and decay. Measure trust, reciprocity and outcomes while humans do the relating.

JAMES MYLETT & DAVID NOUR

From AI to Operating Capacity





CEO • Smart Care

A fireside chat on skilled trades, frontline leadership and better work.

01 Redesign The Workflow

Remove friction around the technician. Better diagnostics and access to information can make time in the field more productive.

02 Rethink The Capacity Gap

Every 2 technicians entering the skilled trades will need to replace the capacity of 5 who are exiting. Recruiting alone won't close that gap

03 Put Knowledge In The Field

Mylett described AI-assisted diagnostic tools in development, bringing equipment information, questions and safety guidance closer to the work.

04 Develop Frontline Leaders

Technical mastery does not automatically create management skill. Select and support supervisors who help technicians thrive.

05 Make Career Paths Visible

An academy approach can connect technical skills with management, sales and project roles, showing people a longer-term future.

06 Change The Story

Better storytelling and broader access can help young people and families see the opportunity in skilled-trade careers.







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AVNIR

SEPTEMBER 2, 2026

Images of the Evening










One room. Three connected conversations.

Capital. Trust. People.

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CONTINUE THE CONVERSATION

Speakers & Hosts



Drew Guevara

GUEST SPEAKER

Head of Global Technology
Investment Banking, Morgan Stanley



James Mylett

GUEST SPEAKER

Chief Executive Officer
Smart Care



Rob Swanson

HOST

EVP/Managing Director, Specialized Industries, California Bank & Trust / Zions Bancorporation



Andy Grosso

HOST

Partner, Private Equity
Buffkin / Baker



David Nour

MODERATOR

Founder & CEO
AVNIR

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In Conversation...

Bring a question worth exploring. Leave with a conversation worth continuing.

📍 Park James Hotel · Menlo Park, CA

🍸 Cocktail Reception + Exclusive Program

🎤 Speaker TBA — You Help Choose

NOVEMBER 18TH 2026

RSVP & INQUIRIES

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Help shape the next conversation.

Share your feedback and the topics you would like us to explore next.

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