12TH Annual

SEO AICON

Alternative Investments Conference

Making Connections That Matter...

Conference Programming

Virtual Event: April 6 - 8, 2021

SEO Alternative Investments

SEO Alternative Investments Conference promotes diversity by providing three days of education, access, and career development for young and experienced professionals who are traditionally underrepresented in the alternatives sector.

It features educational panel discussions and networking activities with leading fund managers, emerging managers, and limited partners.

The conference is part of the SEO Alternative Investments program and plays an integral role in SEO's pioneering work to expand diversity in the sector. It builds upon SEO's 57-year history of providing talented and motivated young people from underserved and underrepresented communities access to educational and career opportunities.

Featured Speakers

Welcome Speaker
William A. Goodloe**
President & Chief Executive Officer
SEO

Emcee
Renae Griffin
Executive Director
GCM Grosvenor

Opening Speaker
Kelly Williams
Founding Chair & Co-Chief Executive Officer
Private Equity Women Investor Network (PEWIN)

Fireside Chat
Henry Kravis**
Co-Chairman & Co-Chief Executive Officer
Kohlberg Kravis Roberts & Co.

Fireside Chat
Jason Kelly
Chief Correspondent
Bloomberg QuickTake

Fireside Chat
Mellody Hobson
Co-Chief Executive Officer & President
Ariel Investments

Fireside Chat
Ramsey Smith* **
Founder
ALEX.fyi

Fireside Chat
Marcelo Claure
Chief Executive Officer
SoftBank Group International
Chief Operating Officer
SoftBank Group Corp.

Fireside Chat
Maya Chorengel**
Co-Managing Partner
The Rise Fund

Fireside Chat
Orlando Bravo**
Co-Founder & Managing Partner
Thoma Bravo

Fireside Chat
Alex Doñé
Deputy Comptroller of Asset Management & Chief Investment Officer
Office of the New York City Comptroller

* indicates SEO Alumnus ** indicates SEO Board Member

Dear Friends,

Greetings to all those gathered this week for the 12th Annual Alternative Investments Conference hosted virtually by the Sponsors for Educational Opportunity. Since 1963, SEO has organized training and internship programs, to help low-income and minority youth achieve academic and professional success.

Committed to opening doors and creating opportunities, Sponsors for Educational Opportunity focuses on mentoring, training and expanding horizons. The SEO Scholars initiative is a free, eight-year academic program that helps low-income public high school students get into and succeed in college. Along with academic assistance, SEO helps Black, Hispanic and Native American undergraduate students land quality internships. This week's Alternative Investments Conference provides educational panels and networking for first and second-year investment banking analysts, with the aim of increasing access and career development opportunities. The dedicated officers, board, staff and supporters of Sponsors for Educational Opportunity, together with the SEO Alternative Investments team, are leveling the playing field and extending a helping hand to the next generation of investment professionals.

Best wishes for a productive event and continued success.

Sincerely,

Thomas P. DiNapoli
State Comptroller

STATE OF
NEW YORK
OFFICE OF THE STATE COMPTROLLER
110 STATE STREET
ALBANY, NY 12236

"The dedicated officers, board, staff and supporters of Sponsors for Educational Opportunity, together with the SEO Alternative Investments team, are leveling the playing field and extending a helping hand to the next generation of investment professionals."

Letter from Scott M. Stringer | April 6, 2021

Dear Friends,

It is my pleasure to extend best wishes to all attending SEO's 12th Annual Alternative Investments Conference.

Since 1963, SEO has done outstanding work to support thousands of young people in New York City. SEO is committed to providing a wide variety of development programs, fellowships, and mentorships for its members. This year's Virtual Alternative Investments Conference's theme "Making Connections that Matter" will bring together professionals of all backgrounds through interactive programing, while showcasing speakers in the Alternative Investments Space. I am confident SEO will continue to build a talented and diverse workforce in our City for years to come.

Thank you to SEO for organizing this year's conference. Please accept my best wishes for continued success.

Sincerely,

Scott M. Stringer
New York City
Comptroller

THE CITY OF NEW YORK
OFFICE OF THE COMPTROLLER
SCOTT M. STRINGER

> "This year's Virtual Alternative Investments Conference's theme "Making Connections That Matter" will bring together professionals of all backgrounds through interactive programing, while showcasing speakers in the Alternative Investments Space."

Letter from William A. Goodloe | April 6, 2021

Dear Friends,

Welcome to SEO's 12th Annual Alternative Investments Conference. Our goal for this event is to help both young and experienced professionals from underrepresented backgrounds: learn the contours of the alternative investments industry; interact with its successful and influential leaders; and secure opportunities to advance within its varied segments.

On behalf of SEO and all this year's conference attendees, I thank our many sponsors, speakers, and panelists for the generous contributions of their time, talent, and resources. We are privileged to have participants representing many perspectives within the industry, from LPs to GPs, large funds to emerging managers with us over the next few days.

We are especially grateful for the guidance and support we receive consistently from members of the SEO Limited Partner Advisory Council. Their input and outreach have greatly shaped this year's event. Of course, the conference would also not have been possible without the involvement of a host of other advisors and supporters. We are also grateful to our Conference Underwriting Sponsor, Oaktree Capital Management, our Alumni Underwriting Sponsor, Siris Capital Group, LLC, and our Official Law Sponsor, Ropes & Gray.

This year's conference is preceded by several other milestones. Twelve years ago, with the wholehearted commitment of Kohlberg Kravis Roberts & Co. and TPG, along with the support of the American Investment Council, SEO launched its Alternative Investments Fellowship Program (AIFP). Since then the AIFP has grown to the 53 partner firms listed in this journal. The SEO Fellowship program provides education, training, and mentoring to strengthen first through third-year analysts and consultants' skills, preparing them to compete for positions in the alternative investments industry. Over 90% of SEO fellows have secured full-time offers to join leading firms.

We also recognize the following for partnering with SEO in preparing underrepresented talent for opportunities in the Alternative Investments sector: Alkeon Capital Management; Artemis Real Estate Partners; Crewcial Partners, LLC; Employees Retirement System of Texas; Ford Foundation; NYC Bureau of Asset Management; NYS Office of the State Comptroller; Robert Wood Johnson Foundation; and Teacher Retirement System of Texas.

As we strive to increase diversity in the alternative investment industry, we invite others to invest in SEO's efforts to widen the entryway to opportunities in alternative investments. It is an investment where past performance does guarantee future results.

Thank you for being here. We look forward to working together to expand and strengthen this initiative.

Sincerely,

William A. Goodloe

William A. Goodloe
President & CEO

"As we strive to increase diversity in the alternative investment industry, we invite others to invest in SEO's efforts to widen the entryway to opportunities in alternative investments. It is an investment where past performance does guarantee future results."

SEO gratefully acknowledges the Robert Wood Johnson Foundation for its $2.3 million, three-year grant to support SEO's Career program.

The Foundation's grant will help SEO continue to strengthen the pipeline of Black, Hispanic, and Native American undergraduates and young professionals who are prepared for careers in investment banking and investment management, while supporting the launch of the SEO Leadership Institute, designed to help alumni advance in their careers and foster a commitment to social change.

Robert Wood Johnson Foundation

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KSL Capital Partners
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Lexington Partners
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NMC New Mountain Capital LLC
Oaktree
Palladium Equity Partners
PERMIRA
Providence Equity
RCP Reverence Capital Partners
Senator
Silver Lake
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Summit Partners
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Thoma Bravo
THL Thomas H. Lee Partners
TPG
Varagon Capital Partners
Vista
Wafra
Warburg Pincus
WCAS

Alternative Investments Leveraged Investing Training and Education (AI LITE) Partners

Atairos
Crestview

Tuesday, April 6, 2021 Agenda

Time	Title	Speaker(s)		
11:00am EST	General Welcome/ Opening Remarks	**William Goodloe**** SEO	**Renae Griffin** GCM Grosvenor	**Kelly Williams** Private Equity Women Investor Network (PEWIN)
11:50am EST	Fireside Chat (Plenary Session)	**Henry Kravis**** Kohlberg Kravis Roberts & Co.	**Jason Kelly** Bloomberg QuickTake	
1:00pm EST	Fireside Chat (Plenary Session)	**Marcelo Claure** SoftBank Group International SoftBank Group Corp.	**Maya Chorengel** The Rise Fund	
1:50pm EST	Breakout Panels			
	Credit: Investing in a Changing Economic Landscape	**David J. Scudellari** **Bruce Richards**	**Adam Gubner** **Sengal Selassie***	**Armen Panossian**
	Hedge Fund: How are Successful Hedge Fund Managers Positioning Their Portfolios	**Mary Knobler** **Robert Galeano**	**Fred Cummings** **Robert Holley***	**Amit Doshi***
	Private Equity: Record Levels of Dry Powder Coupled with High Valuations	**Karen Welch** **Juan Sabater**	**Kathlika Fontes** **Latifa Tefridj-Gaillard**	**Prital Kadakia**
	Real Estate: Navigating the Current Cycle	**Caixia Ziegler** **Natalie Tejero Serafeim***	**Catherine Chen** **Pamela Spadaro**	**John Gluszak**
	Venture Capital: Evaluating First Time Managers	**Meha Patel** **Kavita Nayar**	**Theresia Gouw**	**Charmel Maynard***

* indicates SEO Alumnus ** indicates SEO Board Member

Time	Title	Speaker(s)		
2:50pm EST	Future of Alternatives (LP-Focused Event)	**Cameron Joyce** Preqin	**Vincent Ip** Ropes & Gray	**Kelly Williams** Private Equity Women Investor Network (PEWIN)
3:40pm EST	Closing the Day	**Renae Griffin** GCM Grosvenor		
All Day	Networking			
All Day	One-on-One LP/GP Meetings			

SEO AICON

11:00am | General Welcome/Opening Remarks

Welcome

William A. Goodloe**

President & Chief Executive Officer

SEO

Emcee

Renae Griffin

Executive Director

GCM Grosvenor

Welcome

Kelly Williams

Founding Chair & Co-Chief Executive Officer

Private Equity Women Investor Network (PEWIN)

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All times listed EST

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11:50am | Fireside Chat (Plenary Session)

Fireside Chat
Henry Kravis**
Co-Chairman & Co-Chief Executive Officer
Kohlberg Kravis Roberts & Co.

Fireside Chat
Jason Kelly
Chief Correspondent
Bloomberg QuickTake

1:00pm | Fireside Chat (Plenary Session)

Fireside Chat
Marcelo Claure
Chief Executive Officer
SoftBank Group International
Chief Operating Officer
SoftBank Group Corp.

Fireside Chat
Maya Chorengel**
Co-Managing Partner
The Rise Fund

1:50pm | Breakout Panel

Credit: Investing in a Changing Economic Landscape

Accomplished credit investors will provide insights into the opportunity set for their strategies and how they are positioned amid today's changing landscape. Panelists will also highlight their edge in identifying attractive investments across sectors of the credit market.

Moderator
David J. Scudellari
Senior Vice President and Global Head of Credit & Private Equity Investments
PSP Investments

Panelist
Adam Gubner
Managing Director & Portfolio Manager
PIMCO

Panelist
Armen Panossian
Head of Performing Credit & Portfolio Manager
Oaktree Capital Management

Panelist
Bruce Richards
Chairman & Chief Executive Officer
Marathon Asset Management

Panelist
Sengal Selassie*
Chief Executive Officer & Founder
Brightwood Capital Advisors

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BRIGHTWOOD

MARATHON ASSET MANAGEMENT

OAKTREE

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1:50pm | Breakout Panel

Hedge Fund: How are Successful Hedge Fund Managers Positioning Their Portfolios

Accomplished hedge fund managers will provide insights into the opportunity set for their strategies and how they are positioned amid today's changing landscape. Panelists will also highlight their edge in identifying attractive investments in a variety of asset classes.

Moderator
Mary Knobler
Managing Director of External Affairs
Oaktree Capital Management

Panelist
Fred Cummings
President & Founder
Elizabeth Park Capital Management

Panelist
Amit Doshi*
Managing Partner & Portfolio Manager
Harbor Spring Capital

Panelist
Robert Galeano
Director of Investor Relations
Standard General

Panelist
Robert Holley*
Investment Systems Advisor
Baltimore Fire & Police Employees' Retirement System

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1:50pm | Breakout Panel

Private Equity: Record Levels of Dry Powder Coupled with High Valuations

In 2020, the Private Equity industry continued to see valuations rise as dry powder climbed to record levels. As the economy recovers from Covid-19, our panelists discuss the current investment environment, how they are thinking about managing their portfolios, and where they see the industry going in 2021.

Moderator
Karen Welch
Director, Investments
Spider Management Company

Panelist
Kathlika Fontes
Director of Investor Relations
Grain Management

Panelist
Prital Kadakia
Partner
Serent Capital

Panelist
Juan Sabater
President
Valor Equity Partners

Panelist
Latifa Tefridj-Gaillard
Managing Director
Digital Colony

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1:50pm | Breakout Panel

Real Estate: Navigating the Current Cycle

Accomplished commercial real estate investors will provide insights into the opportunity set for their strategies and how they are positioned amid today's changing landscape. Panelists will also highlight their edge in identifying attractive investments across sectors of the commercial real estate market.

Moderator
Caixia Ziegler
Managing Director of Real Assets
MacArthur Foundation

Panelist
Catherine Chen
Managing Director
Apollo Global Management

Panelist
John Gluszak
Senior Investment Officer, Real Estate
NYC Retirement Systems, Office of the Comptroller

Panelist
Natalie Tejero Serafeim*
Principal
The Baupost Group

Panelist
Pamela Spadaro
Director, Real Estate Investments
Bank of America

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1:50pm | Breakout Panel

Venture Capital: Evaluating First Time Managers

In this panel, we will discuss how LPs evaluate first-time managers led by people of color and women, how these first-time managers can distinguish themselves to attract LP capital, and how diverse managers have generated outsized financial returns.

Moderator
Meha Patel
Vice President
645 Ventures

Panelist
Theresia Gouw
Founding Partner
Acrew Capital

Panelist
Charmel Maynard*
Associate Vice President, Chief Investment Officer, & University Treasurer
University of Miami

Panelist
Kavita Nayar
Investment Manager
DUMAC Inc.

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2:50pm | Future of Alternatives (LP-Focused Event)

Moderator
Cameron Joyce
Vice-President, Research Insights
Preqin

Panelist
Vincent Ip
Partner
Ropes & Gray

Panelist
Kelly Williams
Founding Chair & Co-Chief Executive Officer
Private Equity Women Investor Network (PEWIN)

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3:40pm | Closing the Day

Emcee
Renae Griffin
Executive Director
GCM Grosvenor

Wednesday, April 7, 2021 Agenda

SEO AICON

Time	Title	Speaker(s)		
11:00am EST	General Welcome/ Opening Remarks	**William Goodloe**** SEO		
11:05am EST	Fireside Chat (Plenary Session)	**Mellody Hobson** Ariel Investments	**Ramsey Smith* **** ALEX.fyi	
11:55am EST	Family Office Roundtable (Plenary Session)	**Bei Saville** Advance Treasury and Fingerboard Family Office **Marcus Siezing** Dillon Trust Company	**Eileen A. Aptman** Belfer Management	**Dawn Fitzpatrick** Soros Fund Management
12:55pm EST	Diversity in the Asset Management Industry (Plenary Session)	**Gilbert Garcia* **** Garcia Hamilton & Associates	**Michael Miller** Crewcial Partners	**Brian O'Neil** The Robert Wood Johnson Foundation
1:55pm EST	Diversity Impact Score (LP-Focused Event)	**Cody Coppotelli** Lumina Foundation **Noelle Ramirez** PGIM	**William Heard** Heard Capital	**Jason Lamin** Lenox Park Solutions

* indicates SEO Alumnus ** indicates SEO Board Member

Time	Title	Speaker(s)		
1:55pm EST	Breakout Panels			
	Fund Formation - Fundraising: The Ins and Outs	**Angela Outlaw-Matheny** **Edward Powers**	**Adeyemi Ajao**	**Nick Jean-Baptiste**
	Fund Formation - Independent Sponsor Deals	**Vipul Tandon** **Federico Schiffrin**	**Daniel Balzora** **Chad Strader**	**Duane Jackson**
	Fund Formation - Legal & Compliance	**Arthur Andersen** **Vivek Pingili**	**Michelle Dipp**	**Kolawole Olofinboba**
	Fund Formation - Stepping out with Fund 1	**Sheryl Mejia** **Bharath Srikrishnan**	**Christopher Keller**	**Shawn Schestag**
2:45pm EST	Closing the Day	**Renae Griffin** GCM Grosvenor		
All Day	Networking			
All Day	One-on-One LP/GP Meetings			

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11:00am | General Welcome/Opening Remarks

Welcome

William A. Goodloe**

President & Chief Executive Officer

SEO

11:05am | Fireside Chat (Plenary Session)

Fireside Chat

Mellody Hobson

Co-Chief Executive Officer & President

Ariel Investments

Fireside Chat

Ramsey Smith* **

Founder

ALEX.fyi

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11:55am | Family Office Roundtable (Plenary Session)

Moderator
Bei Saville
Chief Investment Officer
Advance Treasury and Fingerboard Family Office

Panelist
Eileen A. Aptman
Chief Investment Officer
Belfer Management

Panelist
Dawn Fitzpatrick
Chief Investment Officer
Soros Fund Management

Panelist
Marcus Siezing
Chief Investment Officer & Co-President
Dillon Trust Company

12:55pm | Diversity in the Asset Management Industry (Plenary Session)

Moderator
Gilbert Garcia* **
Managing Partner
Garcia Hamilton & Associates

Panelist
Michael Miller
Chief Investment Officer
Crewcial Partners

Panelist
Brian O'Neil
Chief Investment Officer
The Robert Wood Johnson Foundation

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1:55pm | Diversity Impact Score (LP-Focused Event)

Like many industries, Asset Management has struggled with its representation of women, people of color and other marginalized groups. Much of the problem has been attributed to difficulties in gathering demographic data and a reluctance from managers to provide it. Panelists speak about the benefits for LPs and GPs of establishing standard accountability measures for diversity, equity and inclusion, and specifically to Lenox Park's data aggregation tool, the Diversity Impact Score.

Moderator
Cody Coppotelli
Director of Investments
Lumina Foundation

Panelist
William Heard
Chief Executive Officer & Chief Investment Officer
Heard Capital

Panelist
Jason Lamin
Founder & Chief Executive Officer
Lenox Park Solutions

Panelist
Noelle Ramirez
Project Manager, Diversity, Equity, & Inclusion
PGIM

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1:55pm | Breakout Panel

Fund Formation - Fundraising: The Ins and Outs

As Emerging Managers look to break out on their own, fund allocators look for their ability to source, close, and manage transactions successfully. Join our panel as they discuss the challenges Emerging Managers face as they attempt to maintain their stellar track records without the infrastructure of an established fund.

Moderator
Angela Outlaw-Matheny
Director of Investment Staff & Diverse Manager Equity
Crewcial Partners

Panelist
Adeyemi Ajao
Co-Founder & Managing Partner
Base10

Panelist
Nick Jean-Baptiste
Founder & Managing Partner
Jacmel Growth Partners

Panelist
Edward Powers
Managing Partner
HarbourVest Partners

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1:55pm | Breakout Panel

Fund Formation - Independent Sponsor Deals

Panelists speak about the advantages and challenges of being an independent sponsor. In addition, if you're looking to raise your first fund, the panel touches on the importance of closing a few deals as an independent sponsor in advance of fundraising.

Moderator
Vipul Tandon
Managing Partner
Curated Capital Management

Panelist
Daniel Balzora
Managing Director
MHB Capital

Panelist
Duane Jackson
Managing Partner & Chief Executive Officer
Jackson Private Capital

Panelist
Federico Schiffrin
Partner, Private Equity
Unigestion

Panelist
Chad Strader
Co-Founder, Chief Executive Officer & Managing Partner
Red Arts Capital

1:55pm | Breakout Panel

Fund Formation - Legal & Compliance

As new fund managers plan the formation of their new firms and as emerging managers fine-tune their operating models, the need to be aligned with best practices in compliance and legal structuring remains paramount. Join our panel as they discuss the compliance and legal aspects surrounding today's fund management space and what measures managers are taking to reduce their firm's operating risks while increasing their suitability for LP commitments.

Moderator
Arthur Andersen
Partner
Ropes & Gray

Panelist
Michelle Dipp
Co-Founder and Managing Partner
Biospring Partners

Panelist
Kolawole Olofinboba
Managing Partner
Fairview Capital Partners

Panelist
Vivek Pingili
Director
ACA

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FAIRVIEW CAPITAL

1:55pm | Breakout Panel

Fund Formation - Stepping out with Fund 1

Founders, consultants, and allocators speak about what potential or current founders need to think about as they are forming their funds. The discussion ranges from how to build a firm when you can't walk with your track record to finding allocators and programs that may be the best match.

Moderator
Sheryl Mejia
Managing Partner
Steward Asset Management

Panelist
Christopher Keller
Managing Director
Moelis Asset Management

Panelist
Shawn Schestag
Partner
Sixpoint Partners

Panelist
Bharath Srikrishnan
Managing Partner & Founder
BharCap Partners

Time	Title	Speaker(s)		
11:00am EST	General Welcome/ Opening Remarks	**William Goodloe**** SEO		
11:05am EST	Fireside Chat (Plenary Session)	**Orlando Bravo**** Thoma Bravo	**Alex Doñe** Office of the New York City Comptroller	
11:55am EST	Endowments & Foundations Roundtable (Plenary Session)	**Jason Howard*** GCM Grosvenor	**Harisha Koneru Haigh** Northwestern University	**Tim Recker** The James Irvine Foundation
		Stefan Strein Cleveland Clinic		
12:55pm EST	Breakout Panels			
	Career – Breaking into Alternative Investments	**Stacy Levine** **Jaya K. Hathaway**	**Marianna Fassinotti**	**Jennifer Harris**
	Corporate Venture Capital: Growing Source of Capital for Founders	**Osei Van Horne*** **Mario Ruiz***	**Karim Assef**	**Jackson Cummings**
	Emerging Regulatory Risks	**Ama Adams**	**Brandon Gay**	**Scott Weisman**
	Private Company Boards: Navigating the Process	**Aaron Clubb** **Nedu Ottih**	**Gena Ashe**	**Lucinda Duncalfe**
	Secondaries & Co-Investments: An Ever-Changing Marketplace	**Natalie Walker** **Olga Kosters**	**Jeffrey Armbrister** **Jenna Shen**	**Joshua Blaine**

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Time	Title	Speaker(s)
1:55pm EST	Emerging Manager Programs Roundtable (Plenary Session)	**Clinton Stevenson** California Public Employees' Retirement System (CalPERS); **Stephen Cammock*** GCM Grosvenor; **Reginald Sanders*** W.K. Kellogg Foundation; **Patricia Miller Zollar** Neuberger Berman
2:45pm EST	Closing the Day	**Renae Griffin** GCM Grosvenor; **Raina Singh** SEO
All Day	Networking	
All Day	One-on-One LP/GP Meetings	

11:00am | General Welcome/Opening Remarks

Welcome

William A. Goodloe**

President & Chief Executive Officer

SEO

11:05am | Fireside Chat (Plenary Session)

Fireside Chat

Orlando Bravo**

Co-Founder & Managing Partner

Thoma Bravo

Fireside Chat

Alex Doñe

Deputy Comptroller of Asset Management & Chief Investment Officer

Office of the New York City Comptroller

SEO AICON

11:55am | Endowments & Foundations Roundtable (Plenary Session)

Moderator
Jason Howard*
Managing Director, Private Equity Investments
GCM Grosvenor

Panelist
Harisha Koneru Haigh
Managing Director, Private Investments & Real Assets
Northwestern University

Panelist
Tim Recker
Chief Investment Officer & Treasurer
The James Irvine Foundation

Panelist
Stefan Strein
Chief Investment Officer
Cleveland Clinic

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12:55pm | Breakout Panel

Career - Breaking into Alternative Investments

An insightful discussion around uncovering and landing job opportunities within the Alternative Investments sector. With the space becoming increasingly competitive, learning the industry landscape and developing a blueprint for navigating the recruiting process are key to securing these opportunities.

Moderator
Stacy Levine
Partner
Amity Search Partners

Panelist
Marianna Fassinotti
Managing Director
D.E. Shaw

Panelist
Jennifer Harris
Managing Director
Henkel Search Partners

Panelist
Jaya K. Hathaway
Recruiter
CPI

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AMITY SEARCH PARTNERS

CPI

HSP HENKEL SEARCH PARTNERS Setting new standards in search

12:55pm | Breakout Panel

Corporate Venture Capital: Growing Source of Capital for Founders

Global CVC-backed deals soared to an all-time high of $73.1B in 2020, increasing 24% from 2019. Speakers address ways underrepresented founders can work with CVCs, emerging fund managers can partner with CVCs, and discuss the outlook of this growing segment of the venture capital landscape.

Moderator
Osei Van Horne*
Former Managing Director & Co-Founder, Technology
Wells Fargo Strategic Capital

Panelist
Karim Assef
Chairman of Global Investment Banking
Bank of America Merrill Lynch

Panelist
Jackson Cummings
Investor
Salesforce Ventures

Panelist
Mario Ruiz*
Investor
PayPal Ventures

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12:55pm | Breakout Panel

Emerging Regulatory Risks

Change brings risk. This panel will lead us on a tour through the myriad risks facing the alternatives industry in 2021 - AML, CFIUS, new SEC and CFTC leadership, ESG, the rise of SPACs, trade and economic rivalries, and the new administration's priorities winding through it all.

Moderator
Ama Adams
Partner
Ropes & Gray

Panelist
Brandon Gay
Principal
The Carlyle Group

Panelist
Scott Weisman
Managing Director & Global Chief Compliance Officer
Bain Capital

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ROPES & GRAY

12:55pm | Breakout Panel

Private Company Boards: Navigating the Process

Private companies lag far behind in boardroom diversity. Panelists will speak about the role that private equity firms, venture capital, and executive search firms play in increasing the diversity at private company boards. In addition, panelists will also speak about their own experiences and journey on getting on boards. Many times, getting on private company boards is a path to public company boards, that can have an outsized influence on how companies make decisions.

Moderator
Aaron Clubb
Partner
True Search

Panelist
Gena Ashe
General Counsel & Corporate Secretary
Anterix

Panelist
Lucinda Duncalfe
Chief Executive Officer
AboveBoard

Panelist
Nedu Ottih
Principal
Apax Partners

12:55pm | Breakout Panel

Secondaries & Co-Investments: An Ever-Changing Marketplace

Competition in the Secondaries market is rising fast – and so are prices. These trends are expected to continue thanks to an ever-more diverse seller universe and increasing amount of dry powder. Our panelists discuss the challenges and opportunities for co-investors and secondary buyers amidst an uncertain economic environment.

Moderator
Natalie Walker
Partner
StepStone Group

Panelist
Jeffrey Armbrister
Head of Direct Equity Investments
Hamilton Lane Advisors

Panelist
Joshua Blaine
Senior Managing Director
Blackstone Strategic Partners

Panelist
Olga Kosters
Head of Private Debt Secondaries
Tikehau Capital

Panelist
Jenna Shen
Managing Director
Goldman Sachs Vintage Funds

Sponsored by:

Blackstone

Goldman Sachs

Hamilton Lane

StepStone inside private markets

TK

1:55pm | Emerging Manager Programs Roundtable (Plenary Session)

Moderator
Clinton Stevenson
Investment Director
California Public Employees' Retirement System (CalPERS)

Panelist
Stephen Cammock*
Executive Director
GCM Grosvenor

Panelist
Reginald Sanders*
Director of Investments
W.K. Kellogg Foundation

Panelist
Patricia Miller Zollar
Managing Director
Neuberger Berman

Sponsored by:

GCM GROSVENOR

NEUBERGER BERMAN

2:45pm | Closing the Day

Renae Griffin
Executive DIrector
GCM Grosvenor

Raina Singh
Vice President, Alternative Investments
SEO

William Goodloe**

President & Chief Executive Officer

SEO

Since William joined SEO as President & CEO in 2001, he and the SEO team have focused on steadily enhancing programs targeting young people underserved and/or underrepresented at top colleges and in coveted industries.

During William's tenure the number of young people served annually has grown to 3500+ per year – a 700% increase. Along the way SEO has burnished its reputation for preparing young talent to succeed at competitive colleges, as well as at 100+ world-class companies and law firms. Previously, William was Executive Director of Inner-City Scholarship Fund and Vice President of the Center for Youth Development. He began his career in advertising and sales management, including positions with Procter & Gamble and Corning Inc.

William is a trustee of the Altman Foundation and Partnership Schools. He also serves on an advisory board for the Federal Reserve Bank of NY and was appointed to a citywide education task force by Mayor de Blasio. William received his MBA from Columbia Business School and his B.S. from American University.

Renae Griffin

Executive Director

GCM Grosvenor

Ms. Griffin focuses on expanding the firm's small, emerging and diverse manager platform. She also serves on the Diversity, Equity and Inclusion Committee. Prior to joining GCM Grosvenor, Ms. Griffin was CEO of RG + Associates, a consulting firm she founded that provided tools and resources for emerging and diverse asset managers, as well as institutional investors and government agencies seeking diverse business partners. The firm also sponsored the annual ConsortiumEAST and ConsortiumWEST conferences. Prior to RG + Associates, Ms. Griffin worked as a Marketing Director at Progress Investment Management Company, where she was responsible for investor relations, institutional investor marketing, and strategy for many of the largest public institutional investors in the country. Previously, Ms. Griffin worked at Capital Guardian Trust Company as a Marketing Associate working with senior portfolio managers and marketing executives. Ms. Griffin began her career in finance with Bankers Trust Company serving as an Associate to senior officers in the commercial lending group. She received her Bachelor of Science in Economics from the University of San Francisco. Ms. Griffin is a member of the National Association of Securities Professionals (NASP), Private Equity Women Investment Network (PEWIN), and the Real Estate Executive Council (REEC).

Kelly M. Williams

Founding Chair & Co-Chief Executive Officer

Private Equity Women Investor Network (PEWIN)

Ms. Williams is the CEO of The Williams Legacy Foundation. Ms. Williams is a recognized leader in the alternative investment industry having founded the Customized Fund Investment Group (CFIG) at The Prudential Insurance Company in 1999. CFIG was a market leader in providing customized investment solutions in private equity, real estate and infrastructure, and Ms. Williams and her team grew the business to $30 billion in assets managed on behalf of clients. The business was moved to DLJ in 2000 (subsequently acquired by Credit Suisse AG) and Ms. Williams served as its Managing Director and Group Head until 2014, when she led the sale of the business and remained as its President until June of 2015, and a Senior Advisor from 2015 to 2019. Prior to the founding of CFIG, she was an Executive Director with Prudential's private equity group, where she specialized in product development. Prior to joining Prudential in 1993, Ms. Williams was an associate with Milbank, Tweed, Hadley & McCloy specializing in project finance.

Ms. Williams was appointed in 2015 to the Board of Directors of The Greenbrier Companies (GBX), where she chairs its Nominating and Governance Committee and is a Director of Grasshopper Bank, where she chairs its Finance Committee. She also serves on the Board of Trustees of The National Philanthropic Trust, one of the largest managers of donor-advised funds in the U.S., where she serves as vice-chair of its Nominating and Governance Committee.

Ms. Williams is the Chair of the Board of Commissioners of the Smithsonian American Art Museum, having previously chaired its Nominating Committee. She is also a member of the board of The Norton Museum where she serves on its Executive Committee. She is Vice Chair of the board of the Robert Toigo Foundation, and is the founding board chair of the Private Equity Women Investor Network. She also serves on the board of trustees of the NY School of Interior Design and The Olana Partnership.

Ms. Williams has received many awards throughout her career in the financial services industry and was named in 2011, 2012, 2013 and 2014 as one of The Most Powerful Women in Finance by American Banker Magazine. She graduated magna cum laude from Union College in 1986 and received her Juris Doctor from New York University School of Law in 1989. magna cum laude from Union College in 1986 and received her Juris Doctor from New York University School of Law in 1989.

Henry R. Kravis**

Co-Chairman & Co-Chief Executive Officer

Kohlberg Kravis Roberts & Co.

Henry Kravis (New York) co-founded KKR in 1976 and is Co-Chairman and Co-Chief Executive Officer. He is actively involved in managing the firm and serves on each of the regional Private Equity Investment Committees. Mr. Kravis currently serves on the boards of First Data Corporation and ICONIQ Capital, LLC. Mr. Kravis is chairman of the Business Council and also serves as a director, chairman emeritus, or trustee of several other cultural, professional, and educational institutions, including Claremont McKenna College, Columbia Business School (co-chairman), Mount Sinai Hospital, the Partnership for New York City (former chairman), the Partnership Fund for New York City (founder), Rockefeller University (vice-chairman), SEO (chairman), and the Tsinghua School of Economics and Management in China.

He earned a B.A. from Claremont McKenna College in 1967 and an M.B.A. from Columbia Business School in 1969. Mr. Kravis has more than four decades of experience financing, analyzing, and investing in public and private companies, as well as serving on the boards of a number of KKR portfolio companies.

Jason Kelly

Chief Correspondent

Bloomberg QuickTake

Jason Kelly is the chief correspondent for QuickTake by Bloomberg, the company's recently launched digital news network. He's the host of two series debuting in 2021: "Portrait," an intimate profile show, and "The Business of Sports," exploring the nexus of commerce, sports and culture. He also hosts the weekly Bloomberg Business of Sports radio show and podcast. Jason has held a variety of positions at Bloomberg over nearly two decades, including New York bureau chief, anchor of Bloomberg Businessweek on radio and television and editorial head of the live event business. He is the author of two books -- "The New Tycoons," the seminal work on the global private equity industry, and "Sweat Equity," an exploration of the fitness and wellness economy. Prior to joining Bloomberg's Atlanta bureau in 2002, Jason ran a start-up magazine on technology and venture capital and covered the 1996 Olympics for the Atlanta Journal-Constitution. He lives in Sleepy Hollow, New York with his wife and children.

Marcelo Claure

Chief Executive Officer

SoftBank Group International

Chief Operating Officer

SoftBank Group Corp.

Marcelo Claure serves as CEO of SoftBank Group International and COO of SoftBank Group Corp., where he oversees the company's strategic direction and its portfolio of operating companies, including WeWork, SB Energy, Fortress, Boston Dynamics, as well as SoftBank's stake in T-Mobile U.S. He also spearheads the SoftBank Latin America organization, a $5 billion fund dedicated to investing in technology growth opportunities throughout the region, as well as the newly-launched SB Opportunity Fund, a $100 million fund dedicated to investing in entrepreneurs of color.

In addition, Claure serves as Executive Chairman of WeWork, the world's largest co-working and space-as-a-service company, where he oversees the company's long-term strategy and growth-led transformation.

Previously, Claure served as President and CEO and then as Executive Chairman of Sprint, where he is widely recognized for delivering the best financial results in Sprint's 120-year history and architecting its $195 billion merger with T-Mobile U.S. Prior to Sprint, Claure founded Brightstar, which he built into the world's largest global wireless distribution and services company and the largest Hispanic-owned business in U.S. history, with operations in more than 50 countries and revenues exceeding $10 billion.

Claure is a member of the Boards of Directors of Arm and Univision, and serves as Chairman of Fortress. He is also the president of Club Bolívar, Bolivia's most popular and successful soccer team; co-owner and Chairman of Inter Miami CF, this year's newly debuted MLS team; and most recently co-owner of Girona FC.

Maya Chorengel**

Co-Managing Partner

The Rise Fund

Maya Chorengel is a Co-Managing Partner at The Rise Fund, the world's largest, global impact platform committed to achieving measurable, positive social and environmental outcomes alongside competitive financial returns. Founded by TPG in partnership with Bono and Jeff Skoll, and with more than $5 billion in assets under management, Rise invests in growth-stage, high potential, mission-driven companies that have the power to change the world. A longtime impact, private equity and venture capital investor, Maya also leads financial services and fintech investing for Rise globally and is a key architect of the fund's impact methodology and assessment process.

Prior to joining TPG, Maya was a co-founder of Elevar Equity, a leading impact venture capital firm with a track record of top quartile financial returns and meaningful impact on over 20 million low-income households in Asia and Latin America. Prior to Elevar, Maya was Managing Director of the Dignity Fund, a private investment fund focused on local currency debt financing for high-growth microfinance institutions globally. She began her investing career at Warburg Pincus in New York, Hong Kong and Menlo Park.

Maya serves as a Director of Benevity, EverFi, Varo Bank, Nithio, SEO, and Kiva. She also serves on the Advisory Boards of the Harvard Business School Social Enterprise Initiative and CASE i3 at Duke University, and co-authored a Harvard Business Review article entitled "Calculating the Value of Impact Investing." Maya earned an A.B. in Social Studies from Harvard College and an M.B.A. from Harvard Business School.

David J. Scudellari

Senior Vice President and Global Head of Credit & Private Equity Investments

PSP Investments

David Scudellari is Senior Vice President and Global Head of Credit and Private Equity Investments at the Public Sector Pension Investment Board (PSP Investments).

David joined PSP Investments in November 2015 as Senior Vice President and Global Head of Private Debt and Fixed Income to develop the organization's presence in the US leveraged finance market through its US affiliate, PSP Investments USA. From September 2018 to December 2019, he also acted as Interim Chief Financial Officer, overseeing the Finance, Taxation, Treasury, Internal Audit and Investment Operations teams.

David was appointed Senior Vice President, Global Head of Credit and Private Equity Investments in June 2020. In this role, he oversees a growing portfolio of $37.3 billion and a global team of over 80 investment professionals in PSP Investments' New York, Montréal, London and Hong Kong offices.

David has more than 30 years of leveraged finance and capital markets experience in the US and Canada. Prior to joining PSP Investments, David held leadership roles at Barclays and Goldman, Sachs & Co., including that of Global Head of Finance and Risk – Canada for Barclays in New York. He also spent two years in Calgary, where he served as both Senior Vice President and Chief Financial Officer for North West Upgrading Inc., and as a Board member at Teine Energy.

David holds a Master of Business Administration from Pace University – Lubin School of Business, and a Bachelor of Science in Economics from the University at Albany, SUNY.

Adam Gubner

Managing Director & Portfolio Manager

PIMCO

Mr. Gubner is a managing director and portfolio manager in the Newport Beach office, focused on private and public debt opportunities within the firm's special situation/distressed debt strategies. Prior to joining PIMCO in 2010, he was co-founder and co-portfolio manager of ALJ Capital Management's distressed credit strategy platform. Previously, he was a distressed high yield research analyst at Imperial Capital. Mr. Gubner began his career as an attorney and worked in the insolvency practices of Arter & Hadden and Stroock & Stroock & Lavan. He has 18 years of investment experience and an additional seven years of legal experience working with distressed debt. He holds a J.D. from University of the Pacific, McGeorge School of Law and an undergraduate degree from the University of California, Santa Barbara.

Armen Panossian

Head of Performing Credit and Portfolio Manager, Strategic Credit

Oaktree Capital Management

Mr. Panossian is a managing director and Oaktree's Head of Performing Credit, as well as portfolio manager for Oaktree's Strategic Credit strategy. His responsibilities include oversight of the firm's performing credit activities including the senior loan, high yield bond, convertibles, structured credit, emerging markets debt, mezzanine and direct-lending strategies. Mr. Panossian also serves as co-portfolio manager for Strategic Credit's Life Sciences Direct Lending platform which focuses on investment opportunities across the healthcare spectrum from biotechnology and pharmaceuticals to medical devices and healthcare services. Mr. Panossian joined Oaktree in 2007 as a senior member of its Distressed Debt investment team. In January 2014, he joined the U.S. Senior Loan team to assume co-portfolio management responsibilities and lead the development of Oaktree's CLO business. Mr. Panossian joined Oaktree from Pequot Capital Management, where he worked on their distressed debt strategy. Mr. Panossian received a B.A. degree in economics with honors and distinction from Stanford University, where he was elected to Phi Beta Kappa. Mr. Panossian then went on to receive an M.S. degree in health services research from Stanford Medical School and J.D. and M.B.A. degrees from Harvard Law School and Harvard Business School. Mr. Panossian serves on the Advisory Board of the Stanford Institute for Economic Policy Research. He is a member of the State Bar of California.

Bruce Richards

Chairman & Chief Executive Officer

Marathon Asset Management

Bruce Richards is Chief Executive Officer & Chairman of Marathon Asset Management. Mr. Richards is responsible for general oversight of the $22 billion Marathon manages on behalf of its institutional investors. Mr. Richards leads Marathon's Executive Committee, representing senior leadership at Marathon, where the firm's strategic direction is established. Mr. Richards sits on Marathon's Investment Committee, which convenes weekly to evaluate selected investments and establish guidelines for asset allocation. Prior to founding Marathon, Mr. Richards worked on Wall Street for 15 years, including 10 years as a Managing Director in the fixed income divisions of Smith Barney and Donaldson, Lufkin & Jenrette where he was head of a trading desk responsible for principal investments and market making. Mr. Richards has demonstrated a strong commitment to philanthropy and was the recipient of Help for Children | Hedge Fund Cares' Award for Caring in 2014 and the CFA Society's Humanitarian Award in 2017. He has also been honored by the UJA Federation of New York and HELP USA, and was the recipient of the Boomer Esiason Foundation's Most Valuable Player Award and the R Baby Foundation's Philanthropic Leadership Award. Mr. Richards serves on the Investment Committee of The University of Maryland. Mr. Richards received his B.A. in Economics, summa cum laude, from Tulane University and is a member of Phi Beta Kappa.

Sengal Selassie*

Chief Executive Officer & Founder

Brightwood Capital Advisors

Sengal Selassie is the CEO and Founder of Brightwood. Mr. Selassie has been involved in all phases of the firm's development since its founding in 2010. He is a member of the Executive Committee and serves on the Investment Committee of all Brightwood Managed Funds. Mr. Selassie currently participates on the boards of many of Brightwood's portfolio companies and has managed capital for hundreds of limited partners, including a number of prominent public, private and corporate pension plans, endowments, family offices, and high net worth individuals.

Prior to forming Brightwood, Mr. Selassie led Cowen Capital Partners, LLC ("Cowen Capital"), where he served as managing partner from 2006 through 2009. Mr. Selassie joined Cowen Capital from SG Capital Partners LLC ("SG Capital"), Cowen Capital's predecessor fund where he worked from 1998 through 2006. At SG Capital he was a Managing Director and served as group head starting in 2002. Prior to SG Capital, Mr. Selassie worked in the Mergers & Acquisitions Group at Morgan Stanley where he helped media and telecommunications companies execute strategic transactions. He began his career in the Corporate Finance Group of the Investment Banking Division of Goldman Sachs in 1990.

Education: A.B. in Economics, magna cum laude, Harvard College; M.B.A. and J.D., with honors, Harvard University

Mary Knobler

Managing Director of External Affairs

Oaktree Capital Management

Ms. Knobler is a managing director of External Affairs at Oaktree. In this role, she is heavily involved in the areas of Diversity & Inclusion, ESG and Broker Relations, and serves as an ambassador to outside constituencies in these areas. Previously, Ms. Knobler was the co-head of trading for Oaktree. Prior to joining the firm in 1995, Ms. Knobler worked at Lehman Brothers, where she was a high yield bond salesperson. Her previous experience includes four years at Kidder Peabody in high yield bond sales and four years at Drexel Burnham Lambert Inc. in the Syndicate and Private Placement Groups. Ms. Knobler is a graduate of California State University at Northridge with a B.S. degree in psychology and is a Harvard University Advanced Leadership Fellow.

Fred Cummings

President & Founder

Elizabeth Park Capital Management

Fred Cummings is the President and Founder of Elizabeth Park Capital Management. He serves as Portfolio Manager for the privately-held, alternative asset management firm focused on long/short equity, event-driven, and customized investment opportunities in the banking sector. Mr. Cummings is an investment and banking portfolio manager with 30+ years' industry experience leading disciplined, client-focused investment practices. His esteemed performance establishes him as a principled bellwether across the investing and banking industry. His singular focus on banks paired with his curated approach to investing, M&A, and risk analysis transcends the Elizabeth Park mission to be the best bank investment firm in the country.

Prior to founding Elizabeth Park, Fred achieved a distinguished 17-year career at KeyBanc Capital Markets as one of the sell-side's foremost Senior Analysts covering the banking sector. He additionally served as a Senior Analyst for FSI Group, a financial services hedge fund. He launched his career at McDonald & Co. as a sell-side Junior Analyst.

Fred earned his BA in Economics with honors from Oberlin College. He actively supports Oberlin's Connect Cleveland Initiative and Business Scholars Speaking Program as an honored guest speaker for 23 consecutive years. He is an alumnus and ardent supporter of Western Reserve Academy (WRA). Fred dedicates his time serving on several boards, including The Marshall Project, Strategic Value Bank Partners, and Nirvana Analytics. He serves as an investment committee member for Laurel School and WRA.

Fred was named 2017's Crain's Cleveland Business Who's Who and Cleveland.com's People to Watch in 2015. As an industry expert, he has been featured on various media outlets, including The Wall Street Journal, INC Magazine, Crain's Cleveland Business, and CNN Money. Fred lives in the Cleveland area with his wife and two daughters.

Amit Doshi*

Managing Partner & Portfolio Manager

Harbor Spring Capital

Amit Doshi is the Founder, Managing Partner and Portfolio Manager of Harbor Spring Capital, a global and opportunistic investment firm focused on public and private equity. Amit was previously a partner and Managing Director at Tiger Global Management, a public and private equity investment firm. He has previous experience in private equity at Madison Dearborn Partners and in investment banking at Goldman Sachs. Amit earned MBA, JD and AB degrees from Harvard University, and he is an alumnus of the SEO Career Program.

Robert Galeano

Director of Investor Relations

Standard General

Mr. Galeano joined Standard General in 2019 as Director of Investor Relations. Most recently, he was a Vice President of Investor Relations at Rimrock Capital. Prior to that, Mr. Galeano spent eleven years at Graham Capital where he held various positions, including Head of Treasury and Operations and Director in the Investor Relations group. Before Graham Capital, Mr. Galeano was an Associate at Ramius Capital Group. He began his career in 2001 as an Operations Analyst at GlobeOp Financial Services. Mr. Galeano holds a B.S. in Finance from the University of Connecticut and is a CFA and CAIA charterholder.

Robert Holley*

Investment Systems Advisor

Baltimore Fire & Police Employees' Retirement System

Robert Holley is a 20 year veteran in the investment industry, with a background in fixed income, equities, alternatives, and futures/commodities. He currently serves as Investment Systems Advisor for the $3.1 billion Baltimore City Fire & Police Employees Retirement System. Prior to his work in Baltimore, he headed the $2.0 billion Prince George's County Pension Plan, and before that was portfolio manager for the Office of the Illinois State Treasurer. From 2001-2014, Robert worked in New York and Chicago, holding several positions with Citigroup Global Markets, Inc. within their Institutional Clients Group (ICG).

A graduate of Stanford University, Robert completed his degree in 2001 with a focus on public policy. During his undergraduate studies, he participated in a transfer internship program working for the House of Representatives Budget Committee in Washington, DC. Following that, he began a summer internship with Salomon Smith Barney in New York through the Sponsors for Educational Opportunity (SEO) program.

Robert is a champion for workforce diversity. He regularly participates in fundraising and hosting networking events for the Sponsor's for Educational Opportunity (SEO). From 2003-2008 he served as Citigroup's firm captain for the SEO program. He is also an active member of the National Association of Securities Professionals (NASP) and involved in programming and initiatives for the National Association of Investment Companies (NAIC). Robert currently resides in Adelphi, Maryland, with his two sons (Quinton and Malcolm). He enjoys coaching youth baseball, supporting local sports teams, and traveling.

Karen Welch
Director, Investments
Spider Management Company

Karen Horn Welch is Director, Investments at Spider Management Company, which manages over $5 billion in endowment assets for the University of Richmond and other non-profit institutions. In this role, she is involved in leading asset allocation and manager selection across the portfolio, with direct responsibility for public equity, private equity and real estate. She also works closely with Spider's non-profit clients and their investment committees. Prior to joining Spider Management in 2016, Ms. Welch worked at Stanford Management Company from 2007 through 2015. She served as Director, Portfolio Strategy, leading asset allocation, portfolio strategy, and co-managing a portfolio of direct investments. Previously, she was Director of Public Equity, managing the endowment's global public equity and long/short hedge fund portfolio. Prior to joining the Stanford Management Company, Ms. Welch worked at the David and Lucile Packard Foundation, where she served as Manager of Investments. Ms. Welch previously worked as a Research Associate at the Stanford Graduate School of Business and Harvard University Center for International Development and began her career at JP Morgan.

Ms. Welch received a BA with honors in Economics and International Relations from Bucknell University and an MPA with a focus on international economics from Harvard. She is a CFA charterholder and member of Phi Beta Kappa. Ms. Welch serves on the Investment Committee for CommonSpirit Health, a $29B non-profit health care system and is the Chair of its Sub-Committee on Community Economic Initiatives. She serves on the St. Christopher's School Board of Governors and recently chaired its Strategic Planning Committee. She has served as a member of the Bucknell University Alumni Association Board of Directors.

Kathlika Fontes

Director of Investor Relations

Grain Management

Kathlika Fontes is Head of Investor Relations at Grain Management, where she is responsible for developing and maintaining relationships with limited partners and their advisors, expanding the firm's brand footprint, and leading capital development processes. Prior to joining Grain, Fontes was at StepStone Group, where she served as a lead client advisor to large, institutional private equity investors, guiding capital allocations across the asset class. Fontes has worked in investor relationship management at Deutsche Asset Management, constituent relationship management at the American Cancer Society, and technology and strategy consulting at Accenture.

Fontes graduated cum laude with a B.S. in electrical engineering from the Georgia Institute of Technology and received her M.B.A. from Columbia Business School, where she was a Robert Toigo Foundation fellow, Management Leadership for Tomorrow fellow, and Board of Overseers fellow.

Prital Kadakia

Partner

Serent Capital

Prital is a Partner at Serent Capital. He leads the portfolio operations team for Serent Capital, working closely with the management teams at Serent portfolio companies on value-creation initiatives to drive measurable and sustained revenue and earnings impact. Prital's work with portfolio companies spans sales force effectiveness, pricing, operational efficiencies, strategic partnerships, strategy development, procurement, and digital marketing.

In addition, Prital leads management of Serent's wide network of preferred value-creation partners and cross-portfolio efforts to drive leverage and integration within the portfolio.

Prior to joining Serent Capital, Prital was an executive at the Capstone operations team of Kohlberg Kravis Roberts where he led both growth and efficiency transformations within several Private Equity and Special Situations portfolio companies. Previously, Prital was anEngagement Manager at McKinsey and Company, where he focused on sales and marketing effectiveness and strategy at consumer packaged goods clients in the US and Latin America. Prital also started and led the strategy and business planning team for Mars Chocolate, helping the company to define and launch its strategic plan to become the market leader in chocolate. In addition, Prital served as head of operations for a small plastic-bag distribution and manufacturing company, where he led a company transformation to in-house manufacturing and profitability expansion, driving multiple years of double-digit growth.
Prital has a AB in Economics and Citation in Spanish Language from Harvard University where he graduated magna cum laude and an MBA from Stanford University's Graduate School of Business where he was an Arjay Miller Scholar.

* indicates SEO Alumnus ** indicates SEO Board Member ^ indicates Ex-officio

Juan Sabater

President

Valor Equity Partners

Juan Sabater is a Partner at Valor Equity Partners and serves as the firm's President, focusing on external relations as well as investment generation. Juan is a member of the investment committee of both Valor's growth fund and Valor Siren Ventures venture fund. He is a member of the Board of Directors of Harmony Biosciences, a Valor portfolio company. Juan has been advising Valor since 2008 and joined the firm on a full-time basis in 2010. Juan has over 20 years of private equity investing and investment banking experience. Before joining Valor, Juan was a Managing Director with Goldman, Sachs & Co. in the firm's Investment Banking Division. Following Goldman Sachs, Juan became Co-Chairman of the Board of Augeo Affinity Marketing, partnering with a law school friend to build the company. He remains active at Augeo helping to lead the company. In addition to his Valor responsibilities, Juan serves on the Board of Directors of a number of charitable organizations in New York City and nationally, as well as the NAIC and the New America Alliance. Juan holds an A.B. in History from Princeton University. He studied history at the University of Oxford, Mansfield College and holds a J.D. from Stanford Law School. He is formerly an officer in the United States Army Reserve.

Latifa Tefridj-Gaillard

Managing Director

Digital Colony

Latifa Tefridj-Gaillard is a Managing Director and Head of Europe Capital Formation at Digital Colony and is primarily responsible for Investor Relations and Capital Formation in Europe and credit strategy globally.

Ms. Tefridj-Gaillard joins Digital Colony after more than 16 years at Goldman Sachs in Global Markets & Investment Banking where she successfully led a number of European public and private transactions across asset classes with a focus on capital raising, structured financings, and hedging strategies. From 2004 to 2021, Ms. Tefridj-Gaillard held various positions at Goldman Sachs, including Managing Director, Head of U.K. Institutions Solution Sales from 2010 to 2021 and Executive Director, Cross-Asset Strategies for Pension & Insurance, Global Markets from 2008 to 2010. During her career at Goldman Sachs, Ms. Tefridj-Gaillard assisted and managed the formation of over $40 billion in funds across the capital structure, including over $5 billion for private debt strategies.

Ms. Tefridj-Gaillard earned Bachelor's and Master's degrees in Banking, Finance and Insurance from Paris IX Dauphine University and Master in Finance and Actuarial Science from ESSEC Business School in Paris. Ms. Tefridj-Gaillard is fluent in English, Arabic and French and she is passionate about ESG initiatives including climate change and diversity. Ms. Tefridj-Gaillard is a trustee to the board of The Diversity Project Charity and Chair of the Funding Committee.

Caixia Ziegler

Managing Director of Real Assets

MacArthur Foundation

Caixia is responsible for all aspects of MacArthur's real asset portfolio, including strategy development and implementation, manager due diligence, selection and monitoring, performance reporting, and so on. The real asset portfolio includes real estate, digital infrastructure, energy and timber investments. Before joining MacArthur, Caixia was the Head of Real Estate at the Ford Foundation. Prior to that, she was the Director of Global Real Assets at the National Railroad Retirement Investment Trust, where she was responsible for its approximately $2.5 billion allocation to real estate, upstream energy, timberland and infrastructure investments. Caixia earned her bachelor degree from Xiamen University in China and an MBA degree from Wake Forest University. She is a Chartered Financial Analyst (CFA). She is a Board member of Pension Real Estate Association.

Catherine Chen

Managing Director

Apollo Global Management

Catherine Chen is a Managing Director in Apollo's Real Assets Group where she is primarily responsible for the origination, structuring and execution of commercial real estate debt investments. Prior to joining Apollo in 2013, Ms. Chen was a Vice President in the Commercial Real Estate Lending group at Morgan Stanley where she was involved in all facets of commercial mortgage origination, securitization, underwriting and syndication. During her tenure at Morgan Stanley, Ms. Chen also worked in Institutional Sales and Trading management, assisting in the management of global equities and fixed income divisions.

Ms. Chen graduated with an MBA from Columbia Business School and a BS in Business Administration and a BA in Economics from the University of California - Berkeley. Ms. Chen is a career advisor at the Columbia Business School Career Management Center, a member of CRE Finance Council, and a member of WX New York Women Executives in Real Estate.

John Gluszak

Senior Investment Officer, Real Estate

Office of the New York City Comptroller

John Gluszak is a Senior Investment Officer for Real Estate within the Bureau of Asset Management (BAM), in the Office of the New York City Comptroller. BAM is charged with investing and managing a $193 billion portfolio (approximately $15 billion of which is dedicated to real estate), on behalf of the five NYC pension plans. In his role, John is responsible for all real estate debt investments in addition to various separate account and equity investments. Since joining BAM in 2015, John has increased the exposure to real estate debt by $1.2 billion (NAV), returning a since inception 12%+ net IRR.

Prior to joining BAM, John was the Director of Capital Markets for the Royal Bank of Canada (RBC), based in New York, NY, and was responsible for pricing, hedging, and securitizing all of the division's new issue commercial mortgage backed securities (CMBS) loans and products. Before joining RBC Capital Markets, Mr. Gluszak served as a Director for Merrill Lynch, where he was in charge of North American (non-Merrill Lynch) CMBS deals. He has over 30 years of experience in the commercial mortgage debt area, has served as an expert witness in real estate debt court cases, and has been published in a textbook on strategic planning.

Mr. Gluszak received a B.S. in Accounting and a MBA in Finance from St. John's University in 1988 and 1990, respectively.

Natalie Tejero Serafeim*

Principal

The Baupost Group

Natalie Tejero Serafeim is a Principal on the real estate investment team at The Baupost Group, a Boston based investment management firm, where she covers international real estate investments. Prior to joining Baupost in 2013, she worked at Morgan Stanley in their Real Estate Investing and Investment Banking divisions. Natalie attended the Wharton School at the University of Pennsylvania where she graduated from the Huntsman Program with honors.

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Pamela Spadaro

Director, Real Estate Investments

Bank of America

Pamela Spadaro is a leader in the Real Estate Investment Services Group at Bank of America's Private Bank. She is responsible for nationwide acquisitions of commercial real estate assets for our clients. She helps clients unlock the full potential of real estate investments integrating these investments into the context of clients' overall portfolio and life goals. Pamela's clients include high net worth individuals, estate and tax planning professionals and numerous private and public foundations.

Pamela's 30 years of experience has been focused primarily in Texas and Hawaii. Prior to joining Bank of America,

Pamela was with Hawaiian Trust Company, a division of Bank of Hawaii in Honolulu, Hawaii where she was Vice President and Manager of their Real Estate Group. Pamela joined Bank of America's Real Estate Services group in 1999. She has managed a dynamic portfolio encompassing all major property types including retail, industrial, multi-family, residential and development land.

Pamela attended the University of Hawaii. She has her Texas Broker license and is a Certified Commercial Investment member (CCIM®) . She is active both locally and nationally in the organization and in 2004 was the President of the North Texas Chapter. She serves nationally and was selected in 2008 to participate in the Jay Levine Leadership Academy. Pamela served on the National Board for Mosaic, an organization that helps the intellectually handicapped live independently for four years.

Meha Patel
Vice President
645 Ventures

Meha combines 8 years of corporate finance and technology expertise, with previous experiences including investment banking at Goldman Sachs and strategic finance at Zocdoc. She is currently a Vice President at 645 Ventures, an early-stage firm that applies an institutional model to investing in early-stage companies, leveraging advanced proprietary software. Meha is passionate about helping entrepreneurs build companies with long-term transformational impact, with a strong interest in digitally enabled platforms that are disrupting large, legacy markets.

Meha received a B.S. in Finance and Economics (Magna Cum Laude) from New York University, and an M.B.A with Honors from the University of Chicago Booth School of Business.

Theresa Gouw

Founding Partner

Acrew Capital

Prior to co-founding Acrew Capital, Theresia was a co-founder at Aspect Ventures and a Managing General Partner at Accel. Theresia has been fortunate to work with many successful companies through IPOs or acquisitions including: Forescout (FSCT), Imperva (IMPV), Trulia (TRLA), Hotel Tonight (ABNB), Astro (Slack; WORK), LearnVest (Northwestern Mutual), Jasper Design (CDNS) and Kosmix (WMT).

As an entrepreneur, Theresia was founding VP of Business Development and Sales at Release Software, a venture-backed company that provided SaaS to enable digital rights management and payment technologies for the software industry. Earlier, she worked at Bain & Company and as a product manager at Silicon Graphics.
Theresia led investments in Arthur.AI, Cato Networks, Deserve, Exabeam, Ketch, Observable, PredictHQ and Solv Health.

Theresia is a first generation immigrant and a passionate supporter of educational causes and increasing diversity in the tech industry. Theresia was named to Forbes' 100 Most Powerful Women list, has been recognized 9 times on the Forbes Midas List, including 2020, was named one of the 40 Most Influential Minds in Tech by Time Magazine, as well as being named to the Carnegie Corporation's annual Distinguished Immigrants List.

Charmel Maynard*

Associate Vice President, Chief Investment Officer, & University Treasurer

University of Miami

Charmel Maynard currently serves as Associate Vice President, Chief Investment Officer, and University treasurer for the University of Miami. In this capacity, he leads the University's efforts to invest over $3B in assets, including endowment and pension funds. Mr. Maynard is also responsible for the University's ~$2B capital structure, including liquidity and debt issuances. Additionally, he manages treasury and cash management.

Mr. Maynard was previously a vice president with J.P. Morgan's Investment Bank in New York City. During his 10-year career with J.P. Morgan, he focused on investment banking debt capital markets and leveraged finance, where he advised clients on capital structure solutions, deal structuring, and execution of syndicated revolving credit facilities, institutional term loans, and bond issuances.

He currently serves on the Mead Art Museum board as the chair of the Budget Committee, Catalyst Miami Board of Directors (Finance Committee), Knight Foundation Community Advisory Board and Black Angels Miami Board.

Mr. Maynard holds a Bachelor of Arts in political science from Amherst College.

Kavita Nayar
Investment Manager
DUMAC Inc.

Kavita Nayar is an investment manager on the Private Investments team, having joined DUMAC in September 2010. Previously, she spent 11 years at Goldman Sachs, where she last held the position of Vice President (senior credit analyst in the asset management division). Kavita earned her undergraduate degree from Stanford University and also earned a master's degree at Yale University, each in biology, with honors. She is a CFA charterholder.

Cameron Joyce

Vice-President, Research Insights

Preqin

Cameron Joyce has 10 years of experience in the investment industry and is currently part of Preqin's Research Insights team based in London. He previously worked on the international equity desk of one of the largest pension funds in Latin America where he managed a $5bn allocation to Emerging Market equities in Asia. Cameron later went on to work for a Vietnam based investment bank, writing investment research for global institutional clients. Cameron is also a CFA Charterholder and an Economics graduate from the University of Manchester.

Vincent Ip

Partner

Ropes & Gray

A partner in the asset management group, Vincent Ip is a trusted advisor to top asset managers and sovereign wealth funds worldwide. Vincent's cutting-edge work for investment advisors and sponsors includes counseling on all aspects of their business, with a focus on the formation and ongoing representation of Asia-focused private investment funds.

Ranked by Chambers Global and Chambers Asia-Pacific as a leading lawyer in investment funds and named a Law360 "Rising Star" in Fund Formation, Vincent has deep experience advising on a range of funds, including buyout and growth equity, venture capital, distressed/special situations, real estate, co-investment, secondary, and funds of funds. He works closely with both emerging and established sponsors, counseling on matters ranging from the structuring and operation of management companies to those related to corporate governance, as well as securities law and compliance.

Vincent also counsels some of the world's largest institutional investors in connection with investments in private investment funds, hedge funds and separate accounts, and on secondary and co-investment transactions. His secondary market experience comprises both traditional portfolio sales and structured secondaries. Among other matters, he has represented a major sovereign fund in one of the largest-ever secondaries sales of limited partner private funds.
As a U.S.-trained lawyer based in Asia for the last decade, Vincent brings a nuanced perspective on both the global private funds landscape and the Asia market to his work with clients. Clients appreciate that his legal advice is informed by an understanding of market dynamics, as well as "very creative thinking." They also value his transactional background, and the unique vantage point it adds to his counsel on both fund formation and complex transactions.

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Kelly M. Williams

Founding Chair & Co-Chief Executive Officer

Private Equity Women Investor Network (PEWIN)

Ms. Williams is the CEO of The Williams Legacy Foundation. Ms. Williams is a recognized leader in the alternative investment industry having founded the Customized Fund Investment Group (CFIG) at The Prudential Insurance Company in 1999. CFIG was a market leader in providing customized investment solutions in private equity, real estate and infrastructure, and Ms. Williams and her team grew the business to $30 billion in assets managed on behalf of clients. The business was moved to DLJ in 2000 (subsequently acquired by Credit Suisse AG) and Ms. Williams served as its Managing Director and Group Head until 2014, when she led the sale of the business and remained as its President until June of 2015, and a Senior Advisor from 2015 to 2019. Prior to the founding of CFIG, she was an Executive Director with Prudential's private equity group, where she specialized in product development. Prior to joining Prudential in 1993, Ms. Williams was an associate with Milbank, Tweed, Hadley & McCloy specializing in project finance.

Ms. Williams was appointed in 2015 to the Board of Directors of The Greenbrier Companies (GBX), where she chairs its Nominating and Governance Committee and is a Director of Grasshopper Bank, where she chairs its Finance Committee. She also serves on the Board of Trustees of The National Philanthropic Trust, one of the largest managers of donor-advised funds in the U.S., where she serves as vice-chair of its Nominating and Governance Committee.

Ms. Williams is the Chair of the Board of Commissioners of the Smithsonian American Art Museum, having previously chaired its Nominating Committee. She is also a member of the board of The Norton Museum where she serves on its Executive Committee. She is Vice Chair of the board of the Robert Toigo Foundation, and is the founding board chair of the Private Equity Women Investor Network. She also serves on the board of trustees of the NY School of Interior Design and The Olana Partnership.

Ms. Williams has received many awards throughout her career in the financial services industry and was named in 2011, 2012, 2013 and 2014 as one of The Most Powerful Women in Finance by American Banker Magazine. She graduated magna cum laude from Union College in 1986 and received her Juris Doctor from New York University School of Law in 1989. magna cum laude from Union College in 1986 and received her Juris Doctor from New York University School of Law in 1989.

Mellody Hobson

Co-Chief Executive Officer & President

Ariel Investments

As Co-CEO, Mellody is responsible for management, strategic planning and growth for all areas of Ariel Investments outside of research and portfolio management. Additionally, she serves as Chairman of the Board of Trustees of the Ariel Investment Trust—the company's publicly traded mutual funds. Prior to being named Co-CEO, Mellody spent nearly two decades as the firm's President. Outside of Ariel, Mellody is a nationally recognized voice on financial literacy. Her leadership has also been invaluable to corporate boardrooms across the nation. She currently serves as Vice Chair of the Board of Starbucks Corporation, and is the incoming Chairman of Starbucks, effective March 2021. She is also a director of JPMorgan Chase. She previously served as Chairman of the Board of DreamWorks Animation until the company's sale and was also a long-standing board member of the Estée Lauder Companies. Mellody's community outreach includes her role as Chairman of After School Matters, a Chicago non-profit that provides area teens with high-quality after school and summer programs. Additionally, she is vice chair of World Business Chicago; co-chair of the Lucas Museum of Narrative Art; and a board member of the George Lucas Education Foundation and Bloomberg Philanthropies. She also serves on the board of trustees of the Center for Strategic & International Studies, and of the Los Angeles County Museum of Art (LACMA). Mellody is a member of the American Academy of Arts and Sciences, The Rockefeller Foundation Board of Trustees, and serves on the executive committee of the Investment Company Institute. Mellody earned her AB from Princeton University's Woodrow Wilson School of International Relations and Public Policy. In 2019, she was awarded the University's highest honor, the Woodrow Wilson Award, presented annually to a Princeton graduate whose career embodies a commitment to national service. She has also received honorary doctorate degrees from Howard University, Johns Hopkins University, St. Mary's College, and the University of Southern California. In 2015, Time Magazine named her one of the "100 Most Influential People" in the world.

Ramsey Smith* **
Founder
ALEX.fyi

Ramsey D. Smith is an entrepreneur and founder of the digital insurance agency ALEX.fyi, a platform for retirement income solutions. He is focused on modernizing the distribution paradigm in the $230B annuities industry.

Prior to starting ALEX.fyi, Ramsey spent 21 years at Goldman Sachs, where he served as a Managing Director. There, he pioneered and led multiple Equity Derivative businesses. In the Life Insurance space, he developed a franchise that provided corporate level risk management and investment strategies for the nation's top carriers. Previously, he co-led the Equity Division's Canadian Institutional Team, where he was responsible for providing risk management and investment tools to major governmental Pension plans and other institutional clients in Canada. Ramsey also served as co-head of the GS Firmwide Black Network.

He started his career at Credit Suisse as an analyst in the Mergers and Acquisitions Group where he covered the Natural Resources industry.

Ramsey is a Trustee of the Dalton School and serves as Vice Chair of the Board of SEO, a nonprofit organization dedicated to closing the opportunity gap in underserved communities.

He is a graduate of Princeton University and earned his MBA from Harvard Business School. Ramsey and his wife, Sabrina, live in Atlanta and have two children.

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Bei Saville

Chief Investment Officer

Advance Treasury and Fingerboard Family Office

Bei is the Chief Investment Officer of Advance Treasury and Fingerboard Family Office. Headquartered in New York City, Advance is a private, family-owned enterprise for near a century. Bei is responsible for the single-family office investments, family foundation investments as well as the corporate liquid assets. Bei's investment career began in the mid-90's, and over the past 20+ years she has established a reputation as a long-term investor. She has a significant background in portfolio management, alternative investments and strategic planning. Prior to Advance, Bei was the CIO for Endowments and Foundations at Northern Trust. Previously, she was the Director of Alternatives at Helmsley Charitable Trust. Before that, she held senior investment positions at Pfizer and Morgan Stanley. Bei is the Trustee of the Victoria Foundation and the Knowles Foundation. She is a member of the Advisory Council for Alternative Investments at the Sponsors for Educational Opportunity.

Eileen A. Aptman
Chief Investment Officer
Belfer Management

Eileen A. Aptman. Ms. Aptman is the Chief Investment Officer for Belfer Management LLC, a family investment firm that emphasizes energy, real estate, financial services and certain consumer-facing businesses. Prior to joining Belfer Management LLC, Ms. Aptman managed the small and midcap value investment strategy in the Asset Management Division of Goldman Sachs. Ms. Aptman started her investment career as an Equity Analyst for Scott Black at Delphi Management. Ms. Aptman has served on the Boards of Directors of public and private companies including Presidential Financial and American Midstream Partners. Ms. Aptman is currently a Director of Del Taco Restaurants and is Chair of the Compensation Committee. Ms. Aptman is a Member of George Soros' Open Society Foundation Investment Committee as well as the Arts & Sciences Board of Advisors and the Investment Committee of Tufts University. She is also a Member of the Board of CodeNation and on The Brookings Council. Ms. Aptman received a BA from Tufts University in Political Science and Asian Studies and is a CFA® charter holder.

Dawn Fitzpatrick
Chief Investment Officer
Soros Fund Management

Ms. Fitzpatrick joined Soros Fund Management LLC as the Chief Investment Officer in April 2017, in this capacity she heads the firm with oversight for both investment and non-investment personnel. Prior to joining Soros, Dawn spent 25 years at UBS and its predecessor organizations, where most recently she was Head of Investments for UBS Asset Management. In that role, she had global responsibility for overseeing active and passive strategies across asset classes, comprising over $500 billion of client capital. Prior to that she was CEO and CIO of the O'Connor hedge fund business. Dawn began her career as a clerk on the American Stock Exchange and then a trader on the Chicago Board of Options exchanges.

Ms. Fitzpatrick currently serves on the Open Society Foundations' Economic Justice Program Advisory Board, the Federal Reserve Bank of New York's Investor Advisory Committee on Financial Markets, and the Barclays Board as a non-executive Director. Ms. Fitzpatrick received her Bachelor of Science in Economics from the University of Pennsylvania's Wharton School of Business.

Marcus Siezing

Chief Investment Officer & Co-President

Dillon Trust Company

Marcus Siezing is CIO and Co-President of Dillon Trust Company, a private family trust company. The firm investments globally across all asset classes, public and private markets. Mr. Siezing is responsible for all aspects of the investment program.

Gilbert Garcia* **

Managing Partner

Garcia Hamilton & Associates

Mr. Garcia received a B.A. in Economics from Yale University. After graduating in 1985, he joined Salomon Brothers in New York City where he became a Vice President specializing in mortgage-backed securities. In 1990, he joined former Mayor Henry Cisneros to build Cisneros Asset Management Company, ultimately becoming its President. In 2002, he joined Garcia Hamilton & Associates and is the firm's Managing Partner. Under his leadership, the firm grew from $200 million in fixed income assets under management to over $17 billion as of March 2021.

Mr. Garcia is proud to serve on two SEC advisory boards: SEC's Fixed Income Market Structure Advisory Board and SEC's Asset Management Advisory Committee where he leads a subcommittee focused on Diversity and Inclusion. He currently serves as a member of the Board of Trustees for Dallas Police & Fire Pension System and serves with Chairman Henry Kravis on the Board of Directors of SEO, a non-profit providing summer internships on Wall Street for minority undergraduates. Additionally, in 2018 he was co-chair for the Susan G. Komen Race for the Cure. The same year, he was also awarded "Male Entrepreneur of the Year 2018" by the Houston Hispanic Chamber of Commerce. In 2015, Mr. Garcia was awarded the SEO Alumni Leadership Award alongside other honorees, including the former mayor of New York City, Michael R. Bloomberg, and Co-Founder & Co-CEO of The Carlyle Group, David M. Rubenstein.

From 2012 - 2016, Mr. Garcia served as Chairman of the Metropolitan Transit Authority of Harris County where he implemented the "Garcia Rule" which requires at least one diverse investment manager be included in every asset class search. Also, during his tenure, METRO paid down debt and started five year budget forecasting , secured a $900 million full funding grant agreement for light rail expansion, passed a referendum securing additional funding for METRO with 80% voter approval, increased light rail from 7 miles to 22 miles, and reimagined the entire bus system. This led to METRO receiving transparency awards and being awarded the 2015 APTA Award for outstanding Public Transportation System Achievement. Previously, Mr. Garcia served on the Board of Directors of Sanchez Energy, Secretary of the Board of Directors of the Houston Downtown Management District, member of the Board of Directors of the Yale Club of Houston and a member of the Board of Trustees of the Houston Municipal Employees Pension System. In addition, he is a Class X graduate of Leadership Houston. Mr. Garcia is married with four children and enjoys martial arts and coaching youth sports.

Michael Miller

Chief Investment Officer

Crewcial Partners

Michael Miller joined Colonial Consulting (now Crewcial Partners) in 1986 and is currently the firm's Chief Investment Officer. In addition to leading the firm's investment effort, Mike provides the firm's clients with advice on asset allocation, manager selection and performance evaluation/attribution. Mike has thirty four years of experience in the consulting business, all with Colonial Consulting.

Mike holds a BS degree in Computer Science and an MA degree in Statistics, both from Columbia University. He was also awarded the Chartered Financial Analyst or CFA designation.

Crewcial Partners is a New York based firm which focuses on providing investment advice to not-for-profit institutions. The firm is owned by its employees. At present, Colonial has over one-hundred twenty five client relationships representing over $ 30 billion in capital.

Brian O'Neil

Chief Investment Officer

The Robert Wood Johnson Foundation

Brian O'Neil joined the Robert Wood Johnson Foundation as Chief Investment Officer in January 2003. He is responsible for the Foundation's $12 billion investment portfolio.

O'Neil worked at the Equitable Life Assurance Society (now AXA Equitable) from 1980 to 2002. He was named Chief Investment Officer in 1992, at the time the company demutualized and went public. In this role he was responsible for Equitable's $40 billion general account investment portfolio, as well as relationships with ratings agencies and investors. In 1995, he moved to AXA's headquarters in Paris, where we was global head of Asset/Liability Management and, in 1997, was named Chief Investment Officer of AXA Investment Managers Paris. On his return to Equitable, he became head of the Variable Life and Annuity Funds Management business.

O'Neil is a trustee of the Brooklyn Public Library System.

He received an MBA from the Columbia Graduate School of Business, and an AB from Princeton University. He received the CFA designation in 1983.

O'Neil lives in Brooklyn, is married, and has four children.

Cody Coppotelli
Director of Investments
Lumina Foundation

Cody Coppotelli is the director of investments at Lumina Foundation, an independent, private foundation in Indianapolis that is committed to making opportunities for learning beyond high school available to all. In that role, he leads internal diligence efforts in documentation and approval facilitation, and investment reporting. Coppotelli also directs the foundation's portfolio management and leads the evaluation of investment strategies designed to foster greater equity.

Prior to joining Lumina in 2011, he worked as a portfolio analyst at an investment management firm in Indianapolis, where he focused on due diligence and portfolio management for high-net-worth individuals and Indianapolis-area foundations and endowments.
He holds a bachelor's degree in business economics and public policy from Indiana University and earned his Chartered Alternative Investments Analyst (CAIA) charter in 2013.
He serves on the board for The Children's Bureau, an Indianapolis nonprofit that serves abused and neglected children and their families throughout the state. He also serves on the investment committee for The Children's Bureau Foundation and is a member of the organization's Young Professionals Advisory Board.

William Heard

Chief Executive Officer & Chief Investment Officer

Heard Capital

William Heard is the founder of Heard Capital LLC and serves as the Firm's Chief Executive Officer and Chief Investment Officer, leading the Firm's investment process and strategic direction.

Prior to founding and leading Heard Capital LLC, Mr. Heard was a special situations analyst for Stark Investments, a global alternative investment firm. While at Stark Investments, he covered telecommunications, media, technology, financials, and energy. Mr. Heard's investment experience spans across asset classes, including leveraged loans, high yield bonds and equity securities.

Mr. Heard is active in the philanthropic community, focusing his efforts on education and disadvantaged youth. He currently serves on the Leadership Council for A Better Chicago, the City Year Chicago Board of Directors and actively participates in OneGoal: a diverse collective of local organizations creating opportunities for today's youth and low-income population. Mr. Heard is also a board member of the President's Circle and Young Professional Network for the Chicago Council on Global Affairs and is a member of the Economic Club of Chicago.

Mr. Heard is a graduate of Marquette University's College of Business Administration where he earned a Bachelor of Science in Finance and Real Estate. While at Marquette, he founded and established the University's Applied Investment Management (AIM) Program. AIM was the first undergraduate business program in the nation to be selected as a Program Partner by the CFA Institute.

Mr. Heard was raised in Milwaukee, WI. In his spare time, Mr. Heard serves as a mentor to students on topics such as leadership, globalism and markets.

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Jason Lamin
Founder & Chief Executive Officer
Lenox Park Solutions

Jason is Founder and CEO of Lenox Park Solutions, Inc. ("Lenox Park"), a Financial Technology firm that builds software solutions to democratize access to capital, while reducing inefficiencies and bias in how capital is allocated in the Asset Management industry. The firm's clients include some of the largest institutional investors in the world, and its cloud-based collaborative platform, RoundTablesTM, now has approximately $1 trillion in Investor Asset Under Management represented on the platform. In the asset management industry, Jason has been a forthright champion for greater inclusion and intentionality in creating visibility for women, people of color and other underrepresented groups.

Before transitioning Lenox Park into a technology firm in 2013, the company was founded as an Investment Consulting firm assisting some of the largest U.S. Institutional Investors in their asset allocation and asset manager due diligence across all asset classes, including Private Equity, Public Markets, Real Assets and Absolute Returns. Jason co-founded Lenox Park in 2009 with a former colleague after having launched their careers in Merrill Lynch's Investment Banking division, focusing on M&A transactions in the Financial Institutions Group. Jason spent his career at Merrill Lynch working in their New York and London offices. In the 4 years he spent working in Merrill Lynch's London office, Jason helped launch a start-up group focused on deepening the firm's most valuable institutional client relationships across Europe & Africa. Jason serves as an independent director on the boards of Harding Loevner Funds and Paris-based Tikehau Capital Asset Management.

Jason graduated from the University of Texas at Austin with a B.A. in Economics in 1998. While attending the University of Texas, he was a proud member of the Texas Cowboys. He remains very active at his alma mater, where he currently serves on the Advisory Boards for the Department of Economics and the Department of Black Studies, African & African Diaspora Studies. In 2017, Jason had the honor of delivering the Commencement Address to College of Liberal Arts graduates, where he spoke about the importance of inclusive and diverse cultures. In 2020, Jason was honored to receive the College of Liberal Arts' highest award given to University of Texas Alumni, Pro Bene Meritis Distinguished Alumni Award.

Jason has been an active Private Sector Delegate of the United Nations, working with various groups within the Global Compact since 2009, including Co-Chair of SDG Antibribery & Anticorruption Working Group, Office of Special Advisors on Africa & Office of the President of the U.N. General Assembly. Among many speaking engagements at the U.N., Jason has had the privilege of addressing the General Assembly, Diplomats and Heads of State on innovative technologies that reduce bias and have potential to increase flows of investment capital into Africa, and how to move the needle on the SDGs with greater Stakeholder Collaboration.

In 2008, Jason founded Nyawa Funding Group, a 501(c)(3) not-for-profit organization with a mission to improve living standards in Sierra Leone, the country where Jason was born.

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Noelle Ramirez

Project Manager, Diversity, Equity, & Inclusion

PGIM

Noelle Ramirez is a Project Manager, in the Office of Diversity, Equity & Inclusion at PGIM, the global investment management business of Prudential Financial, Inc. PGIM's Office of DE&I oversees strategic inclusion initiatives, collaborates with PGIM's CEOs and human resource leads on recruiting and retention efforts, and works with internal and external affinity organizations to build diverse talent pools across the asset management industry. The Office of Diversity, Equity & Inclusion works to create an inclusive culture where all talent thrives. In this role, Noelle directly supports the DE&I Officer in strategy development, global communications, and external client engagements. Noelle also supports early talent initiatives and oversees the Latinx talent vertical.

Previously, Noelle worked as a Strategy Analyst for Prudential Client Management helping to maintain enterprise relationships with Prudential's largest corporate clients, consultants, and financial partners. Prior to joining Prudential, Noelle spent 5 years working in global mobility and immigration consulting maintaining a global client portfolio.

Noelle joined Prudential in Fall 2017 and joined PGIM in Spring 2019.

Noelle holds a Liberal Arts degree from Dartmouth College.

Angela Outlaw-Matheny

Director of Investment Staff & Diverse Manager Equity

Crewcial Partners

After joining Colonial Consulting in July 2016, Angela has been in multiple roles. She is now Director of Investment Staff and Head of Diverse Manager Equity. Angela and the firm's CIO co-manage the investment team to ensure internal processes are efficient while managing the firm's manager selection process and the systematic process that helps best ideas that are constructed into portfolios. Valuing human capital, diverse talent acquisition and building a training and development program is another area of expertise. Angela also continues to drive the firm's manager diversity initiative in an effort to attract and source diverse asset managers while monitoring protocol and the internal vetting process of ("MWBE") minority-owned and women enterprises. Angela facilitates the constant communication between Colonial and fund managers as the firm continues to build a robust pipeline of what it believes is a largely under-followed segment of the manager community marketplace.

On the client level, Angela acts as a conduit in sourcing diverse managers when recommendations or introductions are made by clients and/or board members. She frequently attends emerging manager/diversity conferences returning with best practices while networking and learning about industry-wide issues and the inclusive approach many institutions are taking to include diverse managers in their searches. She also participates in client meetings and forums at foundations to create awareness of the growing pool of high quality managers to increase opportunities of finding MWBE managers who often outperform or at least perform as well as their nondiverse peers and the index.

Angela spent a stint of her career at a financial services law firm, Schulte Roth & Zabel, assisting attorneys in preparing documents for filing with the SEC. Working along with human resources, she later moved into training and development where she worked toward the firm's technical training, cultural awareness in the workplace, and diversity and inclusion initiatives.

Angela received a Master's of Public Administration at Metropolitan College of New York while volunteering in the evening at a non-profit organization in an underserved area of Brooklyn, NY where she implemented a character development and a college ready program. She also earned a Certificate in Human Resources Management from VillaNova University, which included studies in diversity and inclusion. Angela's Bachelor's degree is in Psychology from Bernard Baruch College of New York. She also serves on York College's (CUNY) foundation board.

Adeyemi Ajao
Co-Founder & Managing Partner
Base10

Adeyemi ("Ade") is co-founder & Managing Partner at Base10 Partners. Before Base10, Ade had a successful career as an entrepreneur and investor.

Ade was the co-founder and CEO of Tuenti (The "Spanish Facebook" which was acquired by Telefonica in 2010 for $100M), co-founder and CEO of Identified ("AI for HR" acquired by Workday in 2014) and a founding investor of Cabify (the largest ridesharing company in Latin America currently valued at over $1B). While at Workday, Ade led launch to Workday Ventures, the first fund focused on Applied AI for Enterprise Software and was VP of Technology Strategy.

Ade is originally from Spain and half Nigerian. He holds an MBA from Stanford's Graduate School of Business. He also holds a J.D. in Law and a M.S in Economics from Icade University in Spain and studied a certificate on Machine Learning at Stanford.

Ade volunteers with CODE2040 who tries to create access, awareness and opportunities for gifted Black and Latin engineering talent.

Nick Jean-Baptiste
Founder & Managing Partner
Jacmel Growth Partners

Founded in 2015, Jacmel was created as a private equity firm targeting lower middle market, family-operated companies in the U.S. that would provide business services to the companies in which it invested. Jacmel has pursued a traditional private equity growth model, but took a differentiated approach by applying an ESG lens to all investments, specifically focusing on workforce development and inclusive economy initiatives for employees. Since 2016, Jacmel and its Manager has deployed $45 million of capital into six companies across two platforms.

Nick has over 20 years of experience as an entrepreneur, working with growing businesses and providing financial service solutions to companies and management teams. Prior to founding Jacmel Growth Partners in 2015, Mr. Jean-Baptiste was a Principal at the growth private equity firm Peterson Partners. He also co-founded the holding company The HiGro Group, LLC, which is 50 percent owned by Jacmel, and acquired Jacmel's second platform DRS Imaging in March 2018. While at Peterson Partners, Mr. Jean-Baptiste sourced and led diligence on 50+ opportunities across a wide range of industries, including BPOs, credit card processing, kiosk services, oil & gas service providers and telecom services; specifically, he led Peterson's investments in leading Brazilian restaurant chain Si Senor, voice and data service provider DCI, and safety service provider PEC.

Prior to joining Peterson Partners, Nick was a Vice President at Macquarie Capital (USA) Inc., where he provided strategic advisory services and capital market solutions to private equity clients. Nick began his career on Wall Street with Citigroup's Investment Banking Division, where he was a member of the bank's Healthcare Coverage Group. During Mr. Jean-Baptiste's tenure on Wall Street, he was part of teams that provided debt financing for over $10 billion of private equity sponsored recapitalizations and led five public equity offerings.

Nick received a BA in Public Policy from Duke University in 2000, and an MBA from University of North Carolina Kenan-Flagler Business School in 2007.

Edward Powers
Managing Partner
HarbourVest Partners

Edward Powers is a member of HarbourVest's primary investment team, where he focuses on small, emerging and diverse managers. He also works closely with the firm's Custom Solutions Group, with a focus on Separately Managed Accounts (SMAs). Ed joined HarbourVest in 2016 as part of the Firm's acquisition of the BAML Capital Access Funds business.

Ed began making private equity investments in 1997, and started his career making investments in various community development equity products.

Ed received a BA in English and Economics from the University of Pennsylvania and an MBA and MA in Public Policy from the University of Chicago.

Vipul Tandon

Managing Partner

Curated Capital Management

Vipul Tandon is the Managing Partner of Curated Capital Management, which has an exclusive partnership with Sponsors for Educational Opportunity ("SEO") to raise a private equity fund with a strategic and long-term approach to accelerating diversity in private equity firm ownership while delivering attractive investment returns.

Curated Capital has a dedicated investment strategy of backing elite Independent Sponsors on a pre-fund and deal-by-deal basis. We believe that persistent capital inefficiencies in the Independent Sponsor market have created a clear investment opportunity. We also believe that this catalytic pre-fund capital is critical to growing the universe of minority and female owned PE firms by providing them with an independent track record which is often required to unlock the large pools of capital within emerging manager programs.

From 2018 to 2020, Mr. Tandon served as a Senior Managing Director at Newlight Partners, a private investment firm with approximately $4 billion in capital commitments and assets under management formed by the spin out of the Strategic Investments Group of Soros Fund Management ("Soros PE"). Prior thereto, Mr. Tandon was a Senior Managing Director at Soros PE, which he joined in 2006, where he focused on opportunities in the financial services, automotive and industrial industries.
Earlier in his career he served in investment roles with American Capital Strategies, Foamex International, Frontline Capital Group, Trace International Holdings and DLJ Merchant Banking Partners.

Mr. Tandon has previously served on many boards, including Essent (ESNT: NYSE), a private mortgage insurer; APR Energy (APR:LON) a temporary power provider; Crystal Financial, a secured direct lender and McLarty Automotive Group, a private car dealership group. In addition he served as an observer on the board of Owl Rock Capital Corporation (ORCC:NYSE) a leading BDC.

Mr. Tandon serves as a Co-Founder and Co-Chair of the NYC Development Council of US Soccer, the governing body for soccer in the United States and as director of Civic Builders, a real estate developer for charter schools. Previously he served as a trustee of Central Queens Academy, a charter school.

Daniel Balzora

Managing Director

MHB Capital

Daniel Balzora has been a private equity investor for 15 years, working with management teams as a board director and strategic advisor. Most recently, he was a Principal at TZP Group, a $2 billion private equity firm where he led investments in the business services and consumer sectors. Prior to TZP Group, he was an investor at Pouschine Cook Capital, a private equity firm focused on investments in the business services, industrial, consumer, and healthcare sectors.

Before beginning his career in private equity, Daniel was an M&A investment banker at Jefferies Group covering the business services, media, and technology sectors and a financial analyst supporting the manufacturing and logistics functions at General Mills.
For six years, Daniel served as Board Chairman and Treasurer of Career Gear, a national non-profit providing social services and professional attire to disadvantaged men seeking employment.

Daniel received a B.A. in Economics from Yale University. He lives on the Upper West Side of New York City with his wife and two sons.

Duane Jackson

Managing Partner & Chief Executive Officer

Jackson Private Capital

Duane Jackson is the founder of Jackson Private Capital, a merchant bank that provides objective advice and long-term, flexible capital to founder- and family-led businesses below $20M in EBITDA. Duane previously worked at BDT Capital Partners, a merchant bank focused on larger founder- and family-led businesses. At BDT, he had broad responsibilities including sourcing and executing transactions, leading research initiatives across the firm, and assisting in the development of the firm's approach to ESG. Duane also served as a Toigo Private Equity Fellow at Vista Equity Partners, a private equity firm focused on software and technology businesses. He came to appreciate the role families have in building businesses over the long-term by working alongside several notable families, supporting their direct investments ranging from pre-revenue angel stage companies to small but mature, lower middle market companies. Duane first learned to creatively address complex problems as a member of the Chief Investment Office for TARP at the US Treasury Department during the global financial crisis and as an investment banker to financial institutions at Merrill Lynch. Duane earned an MBA from Harvard Business School where he was an MLT Fellow and earned a BBA from the George Washington University. He serves as an investor-in-residence at Chicago Booth and serves as a trustee at Lake Forest Academy.

Federico Schiffrin

Partner, Private Equity

Unigestion

Federico is currently a member of the private equity Advisory Board of Unigeston, a Swiss-based asset manager with approximately $22 billion in assets under management, where he supports the firm in sourcing and monitoring of private equity transactions. Prior to his current role, he spent over 12 years as a Partner and member of the Investment Committee at Unigestion, where amongst other things, he was responsible for direct investments in the Americas, investing and overseeing a multi-billion dollar pool of capital focused on investing in middle-market companies. In this capacity he invested alongside a significant number of independent sponsors, in different transactions types and structures. Prior to joining Unigestion, Federico worked at Three Cities Research, Inc., a middle-market private equity fund based in New York where he was responsible for leading equity transactions and portfolio monitoring in tech-enabled business services sectors. Federico holds an accounting degree from the Universidad de Buenos Aires and an MBA from NYU Stern School of Business.

Chad Strader

Co-Founder, Chief Executive Officer & Managing Partner

Red Arts Capital

Chad Strader is a Co-Founder, Co-CEO and Managing Partner for Red Arts Capital where he leads the management and development of the firm's investments. Before forming Red Arts in 2015, Chad invested in private equity transactions at Woodlawn Partners and held finance and accounting roles at PepsiCo. Chad serves as a Board Director of De La Salle Institute, a coeducational, secondary school located in Chicago and on the Chairmen's Advisory Council for the Big Shoulders Fund, a civic organization that creates opportunities for inner-city children to attend Catholic schools. He also is a member of the Young Leaders Circle at The Milken Institute, The Chicago Club and The Economic Club of Chicago. Chad received an MBA from The University of Chicago Booth School of Business and a BBA from Georgia Southern University.

Arthur Andersen

Partner

Ropes & Gray

Arthur is a partner in the asset management group. Arthur joined Ropes & Gray in 2008 and is resident in the Boston office. He regularly advises private fund clients on a variety of matters. Arthur has experience in the formation, offering and on-going representation of various types of private investment funds including buyout, growth equity, venture capital, impact investing and secondary funds. His clients range from emerging managers developing their organizations and raising their initial investment funds, to global private equity sponsors operating and raising capital internationally across multiple asset classes. He has advised clients in connection with co-investments, structured secondary transactions and fund restructurings. Arthur's practice also regularly includes advising on internal firm structuring, operations and governance, including management transitions and "spinoffs" of investment teams from larger organizations, as well as other investment advisory, regulatory, compliance and securities matters.

Michelle Dipp

Co-Founder and Managing Partner

Biospring Partners

Michelle Dipp is a Co-Founder and Managing Partner at Biospring Partners. Michelle is passionate about life sciences and has over a decade of private equity and venture capital expertise. She currently serves on the Board of Directors of Biospring portfolio company, Abzena.

Prior to Biospring, Michelle was a Managing Director at General Atlantic where she launched their first life sciences investment platform and served as a member of the life sciences investment committee. Michelle led multiple investments in synthetic biology and served as a Board Observer for Ginkgo BioWorks and as a board member for PathAI and Immunocore.

Michelle co-founded and served as General Partner of Longwood Fund, a leading healthcare investment firm based in Boston.

Before joining Longwood, Michelle was a senior executive at GlaxoSmithKline's (GSK) who acquired Sirtris Pharmaceuticals, Inc., where Michelle served as Vice President of Corporate Development.

Michelle began her investment career at the Wellcome Trust after completing her medical training. She holds a Bachelor of Medicine and Bachelor of Surgery from the University of Oxford Medical School and a Doctor of Philosophy in Human Physiology from the University of Oxford.

Being born and raised on the border in El Paso, Texas, Michelle cares deeply about her community. Michelle currently serves on the Trustee Advisory Board for Beth Israel Deaconess Medical Center; Advisory Board for the Women's Foundation of Boston; Board of Directors for Life Science Cares; Rockefeller University Council; Advisory Council for the American Museum of Natural History; Co-Founding Member of the Bowman Fund, Brasenose College Boat Club, Oxford University; and a member of the World Economic Forum's Young Global Leaders.

Michelle lives in New York and enjoys hiking and cycling.

Kolawole Olofinboba

Managing Partner

Fairview Capital Partners

Dr. Olofinboba is a Managing Partner at Fairview Capital Partners, a private equity investment management firm in West Hartford, CT. He is involved in a broad set of investment, business development and governance activities at the firm. Additionally, he serves on the advisory boards of several private equity partnerships in Fairview's fund portfolios.
Prior to joining Fairview, Dr. Olofinboba was a Consultant at McKinsey & Company, serving U.S. and global clients in healthcare and private equity. He has also practiced medicine as a board-certified internist/hospitalist and assistant professor at the University of Connecticut Health Center in Farmington, CT.

He is a director on the boards of Liberty Bank, Hartford HealthCare, the Connecticut Science Center, and the National Association of Investment Companies (NAIC).
Dr. Olofinboba received his medical degree from the University of Ibadan, Nigeria and an MBA in

Financial Management from the MIT Sloan School of Management, where he was a Robert Toigo Fellow.

Vivek Pingili
Director
ACA

Vivek Pingili is a Director and senior member of the private markets practice group within the compliance consulting division at ACA Compliance Group (ACA). As a private markets specialist, Vivek helps a broad range of domestic and international illiquid asset managers (including venture capital, private equity, private real estate, private credit, and private equity and venture capital fund-of-funds managers) successfully implement and maintain comprehensive regulatory and operational compliance programs (including joint FCA and SEC compliance programs). Vivek also helps clients prepare for SEC audits.

Before joining ACA, Vivek was a senior counsel in the Private Investment Funds practice group at Proskauer Rose LLP. While at Proskauer, Vivek represented a broad range of illiquid asset managers, including managers of buy-out funds, secondary funds, venture capital funds, private real estate funds and fund-of-funds, in regulatory compliance matters as well as in connection with the structuring, formation, offering and ongoing operations of such funds. Prior to Proskauer, Vivek was head of legal and compliance for the alternative investments business at Russell Investments, a large global asset manager, where he managed the compliance program for the firm's global alternative investment business unit (specializing in private real estate, venture capital and private equity strategies) and represented the foregoing business unit in a broad range of legal matters. Prior to joining Russell Investments, Vivek was a senior attorney in the Private investment Funds practice group at Ropes & Gray LLP. While at Ropes, Vivek represented a broad range of illiquid private investment fund managers in regulatory compliance matters as well as in connection with the structuring, formation, offering and ongoing operations of such funds.

Vivek received a J.D. from Northeastern University School of Law in 2002 and a B.A., magna cum laude, from Brandeis University in 1999.

Sheryl Mejia
Managing Partner
Steward Asset Management

Sheryl leads the investment committee at Steward Asset Management, an anchor investor to emerging private equity and opportunistic managers as they prepare to launch fund I.

Most recently she was the Director of Emerging Managers at the New York State Common Retirement Fund, overseeing more than $8 billion in commitments to over 120 smaller and emerging firms. Previously she held roles at Decagon Advisors, Deutsche Bank/Bankers Trust and KPMG.

She holds an MBA from the Wharton School and earned her bachelor's degree in Commerce from Queen's University in Canada. She is a CFA charterholder and a Canadian Chartered Accountant.

Christopher Keller

Managing Director

Moelis Asset Management

Chris joined Moelis Asset Management in 2018 and serves as co-portfolio manager of Archean Capital Partners, a fund exclusively dedicated to backing first-time private equity funds. He was previously with Summit Strategies Group, an institutional investment consultant, where he was a Managing Director, Head of Research and Head of Private Markets for 11 years. In his previous role, Chris committed over $10 billion to private structures such as primary funds, co-investment and secondary transactions, including commitments to emerging managers where he and his team were responsible for sourcing, diligence, negotiation and recommendation to clients. He was also an active member on dozens of fund advisory boards. Chris is a Kauffman Fellow, a global network of venture investors dedicated to supporting entrepreneurship and innovation, a CFA® charterholder and received an MBA from Washington University in St. Louis and an undergraduate degree in Molecular Biology from The University of Colorado.

Shawn Schestag
Partner
Sixpoint Partners

Mr. Schestag is a Partner at Sixpoint Partners, responsible for leading the firm's Secondary Advisory business. He has 14 years of investment banking experience, focused on the private equity industry. Prior to joining Sixpoint, Mr. Schestag spent seven years with the Private Fund Group at Credit Suisse, where he was a senior member in the Secondary Advisory practice. During his tenure in the Private Fund Group, he executed a broad range of secondary transactions on behalf of institutional investors and private investment firms. Mr. Schestag began his investment banking career in Credit Suisse's Financial Sponsors Group, executing debt and equity financings and financial advisory assignments on behalf of large cap and middle market private equity firms. Mr. Schestag earned a B.A. in History from Reed College and an M.B.A. from Cornell University.

Bharath Srikrishnan
Founder
BharCap Partners

Mr. Srikrishnan is the founder of BharCap. Prior to BharCap, Mr. Srikrishnan spent five years as a partner on Pine Brook's financial services investment team. He is also a member of Pine Brook's Investment Committee. Mr. Srikrishnan represents Pine Brook as a board director of Fair Square Financial Holdings LLC, United PanAm Financial Corp. and BharCap as a board director of Sculptor Capital Management, TRIA Capital Partners and Vertical Resources Group. Mr. Srikrishnan formerly served as chairman and president of WhiteStar Asset Management, LLC and director of Trinitas Capital Management, LLC prior to its sale to Clearlake Capital Group. Mr. Srikrishnan has 20 years of financial services investment, operating and advisory experience. Before joining Pine Brook, he was a managing director at Five Mile Capital Partners, where he was responsible for leading the firm's financial services investment activities. Mr. Srikrishnan previously was a principal of Lee Equity Partners, where he focused on making financial services private equity investments. Additionally, he was a co-founder and managing director of NewStar Financial, Inc., a private equity-backed middle market commercial finance company that successfully completed an initial public offering. Mr. Srikrishnan began his career as an analyst in the Financial Institutions Group of Salomon Smith Barney and as an associate with Capital Z Financial Services Partners. Mr. Srikrishnan holds a B.S. from Boston College in Finance, Operations and Strategic Management (cum laude). Mr. Srikrishnan also serves as a board director of the USA Wrestling Foundation and the YMCA of Greenwich.

Orlando Bravo**
Co-Founder & Managing Partner
Thoma Bravo

Orlando Bravo is a Founder and Managing Partner of Thoma Bravo. He led Thoma Bravo's early entry into software buyouts and built the firm into one of the top private equity firms in the world. Today, Orlando directs the firm's strategy and investment decisions in accordance with its principles of partnership, innovation and performance. Orlando has overseen over 270 software acquisitions conducted by the firm, representing more than $79 billion in transaction value. Forbes named him "Wall Street's best dealmaker" in 2019, and he was part of Thomson Reuters "Eight Buyout Pros to Watch" in 2009.

Orlando was born in Mayaguez, Puerto Rico. He graduated Phi Beta Kappa with a bachelor's degree in economics and political science from Brown University in 1992 and earned a JD from Stanford Law School and an MBA from the Stanford Graduate School of Business in 1998.

He is the Founder and Chairman of the Bravo Family Foundation, the mission of which is to provide access and opportunities to young adults in Puerto Rico. Orlando directs the organization's various programs and initiatives to promote entrepreneurship, community-based leadership and economic development in Puerto Rico. After Hurricane Maria hit Puerto Rico in 2017, he spearheaded a humanitarian mission to remote communities on the island. In 2019, Orlando committed $100 million to the Foundation's Rising Entrepreneurs Program (REP) with the goal of fostering entrepreneurship in Puerto Rico.

The Orlando Bravo Center for Economics Research at Brown University supports innovative research, training and collaborative projects for faculty and students in the Department of Economics. At Stanford Law School, Orlando created the Bravo Family Public Interest Post-Graduate Fellowship Fund to support students seeking full-time employment in public interest.

Orlando's philanthropic focus also includes child healthcare. He endowed faculty scholar and fellow positions at Stanford University's Sean N. Parker Center for Allergy Research. He supports a wide range of medical research conducted at Stanford University, at the University of California San Francisco (UCSF) and at the College of Physicians and Surgeons at Columbia University.

* indicates SEO Alumnus ** indicates SEO Board Member ^ indicates Ex-officio

Alex Doñé

Deputy Comptroller of Asset Management & Chief Investment Officer

Office of the New York City Comptroller

Mr. Doñé is the Deputy Comptroller for Asset Management and Chief Investment Officer for the Bureau of Asset Management in the Office of the New York City Comptroller, which serves as investment advisor to the New York City Retirement Systems. With over $250 billion in assets, it is the fourth-largest public pension fund in the United States providing retirement benefits to over 730,000 members, retirees and their beneficiaries.

Prior to joining the Comptroller's Office, Mr. Doñé served for two years as Presidential Appointee to the Barack Obama Administration at the U.S. Department of Commerce - Minority Business Development Agency.

Previously, Mr. Doñé served as a consultant and member of the investment team at Clearlake Capital Group, a privately held private equity investment firm. Before that, Mr. Doñé was head of retail industry investment banking at KPMG Corporate Finance. He began his over 25 year career as an investment banker at Merrill Lynch & Co. where he led or participated in the execution of financial and strategic advisory transactions representing more than $25 billion in transaction value.

Mr. Doñé holds an AB from the Woodrow Wilson School of Public and International Affairs at Princeton University.

Jason Howard*

Managing Director, Private Equity Investments

GCM Grosvenor

Mr. Howard is co-head of the firm's private equity diverse manager practice and also serves on the ESG Committee and the Diversity, Equity and Inclusion Committee. He focuses on client portfolio management and private equity fund investments and co-investments. Prior to joining GCM Grosvenor, Mr. Howard was an Associate in the Investment Banking Division at Goldman Sachs. Mr. Howard was also a Manager of Deal Analysis at Walt Disney Pictures and Television and a consultant for Turner Broadcasting. He began his career in the Mergers & Acquisitions Group at Goldman Sachs. Mr. Howard graduated with high honors from the Goizueta Business School at Emory University with his Bachelor of Business Administration. Mr. Howard currently serves as a member of the board of the Segerstrom Center for the Arts, and he recently completed a nine-year term on The Salvation Army's National Advisory Board.

Harisha Koneru Haigh

Managing Director, Private Investments & Real Assets

Northwestern University

Harisha Haigh has 25 years of experience advising and investing in fund managers and in companies. Her experience stretches across asset classes and geographies. Ms. Haigh has a particular understanding of the institutional private markets. As a member of numerous advisory boards, she is a thought partner to general partners on strategic, legal, and organizational matters.

For the last 16 years, Ms. Haigh has managed the Private Investments and Real Assets portfolios for Northwestern University's $12 billion endowment. Ms. Haigh is responsible for all aspects of the nearly $6 billion illiquid portfolio, including venture capital, buyouts, real estate, and natural resources investments. She also led several co-investments across the portfolio.

Prior to joining Northwestern University in 2005, Ms. Haigh was a Principal at PPM America Capital Partners, LLC, the U.S. private equity manager for Prudential plc and Jackson National Life Insurance Company. She also worked in London for Silverfleet, a PPM affiliate, focusing on European middle market buyout transactions. Ms. Haigh began her career in the investment banking department of ABN AMRO, concentrating on mergers and acquisitions of small and middle market companies.

Ms. Haigh received a Bachelor of Science in Business Administration from Washington University in St. Louis and an MBA from Northwestern's Kellogg School of Management. Ms. Haigh is a CFA charterholder.

Ms. Haigh resides in Chicago with her husband and two children. She is a member of SEO Alternative Investments' Limited Partner Advisory Council and hosts a biweekly Open House for young women on behalf of the Women's Association of Venture and Equity (WAVE). Ms. Haigh serves on the investment committee for the North South Foundation and the Indian American Medical Association Charitable Foundation.

Tim Recker

Chief Investment Officer & Treasurer

The James Irvine Foundation

Tim Recker joined Irvine in November 2016 as the Chief Investment Officer and Treasurer. He directs the Foundation's $3.5 billion endowment, develops its investment policy and strategy, and is a member of the Foundation's Executive Team.

Prior to Irvine, Mr. Recker served for 10 years as the Managing Director of Private Equity and Real Assets for the Regents of the University of California where he oversaw an $8 billion portfolio. Previously, he was Director of Alternative Investments for the Michigan Retirement System, where he oversaw a $13 billion portfolio of Private Equity, Hedge Funds, and Structured Products. Prior to Michigan, Mr. Recker was a portfolio manager for GE Asset Management, running a $5 billion multi-asset portfolio. He completed the two-year Financial Management Program at General Electric.

Mr. Recker is the former Chairperson of the Institutional Limited Partners Association and is also a Chartered Financial Analyst. He is a trustee and investment committee chair for the College Preparatory School, an investment committee member for the Piedmont Community Church and a regular guest lecturer at UC Berkeley.

Mr. Recker earned his M.B.A. from the University of North Carolina at Chapel Hill, and a bachelor's degree in economics and business administration from Bellarmine College.

Stefan Strein
Chief Investment Officer
Cleveland Clinic

Stefan joined the Cleveland Clinic in 2015 in the newly created role of Chief Investment Officer. He has over two decades of investment experience, including the management of diversified endowment portfolios, alternative investments, and portfolios of direct investments. He is responsible for the strategic direction and investment management of the Clinic's $13 billion in investible financial assets, which includes the short and long-term investment portfolios, defined benefit pension funds, and a captive offshore insurance trust. In addition, he co-Chairs the Cleveland Clinic's Retirement Committee, which oversees the $10 billion in defined contribution assets invested for the organization's 70,000 caregivers.

Prior to joining the Cleveland Clinic, Stefan was the Vice President and Chief Investment Officer of The Annie E. Casey Foundation, a national private philanthropic organization he served for ten years. Earlier in his career, Stefan was a member of the general partner in two early stage venture capital firms and also worked in commercialization and licensing of university-developed technology for Johns Hopkins and Virginia Tech.

Stefan has served on the Advisory Boards of several financial/investment organizations. Currently he is serving on the Advisory Boards of ABRY Partners, Altos Ventures, Flare Capital, Greenspring Associates, and for Sponsors for Educational Opportunity, an organization dedicated to providing education-to-career pathways into the investment industry for minority youth and college students. In addition, he serves on the Investment Committee of The Cleveland Foundation and has previously served on the Investment Committees of the Maryland State Retirement and Pension System, The Planned Parenthood Federation, and The Baltimore Community Foundation. Stefan holds an undergraduate degree from Washington College and a graduate degree from Johns Hopkins University.

Stacy Levine
Partner
Amity Search Partners

Stacy joined Amity Search Partners at its inception and is a Partner in our New York office. Stacy has over 15 years of private equity and hedge fund recruiting experience placing candidates at all levels in North America and key international markets. Prior to beginning her career in recruiting, Stacy was a teacher and athletic coach at Greenwich Academy and The Waterside School. Stacy graduated from The George Washington University with a B.A. in Spanish Literature and holds a Master's degree in Education from Manhattanville College. She is also an aluma of Hopkins School.

Marianna Fassinoti

Managing Director

D.E. Shaw

Marianna Fassinotti is a managing director of D. E. Shaw & Co. (London), LLP and a member of the D. E. Shaw group's Asset-Backed Strategies ("ABS") investment unit. Ms. Fassinotti heads the Debt and Related Assets team within the ABS investment unit and operates from the firm's London office. Prior to joining the D. E. Shaw group in 2015, she was a managing director at Siguler Guff & Company, LP, co-head of that firm's distressed investment business, and co-portfolio manager of its distressed opportunities funds. Previous to that, Ms. Fassinotti was an associate director at UBS AG focusing on global distressed debt and special situations investments. She began her career as a research associate in residential mortgage-backed securities at Lehman Brothers. Ms. Fassinotti received her A.B. in government, magna cum laude, from Harvard University, where she was awarded a Harvard College Scholarship for academic distinction, and earned an M.B.A. from the Tuck School of Business at Dartmouth, where she was an Edward Tuck Scholar. She is a native Italian speaker and fluent in Spanish.

Jennifer Harris
Managing Director
Henkel Search Partners

Jennifer is an experienced recruiter who works across all levels with an emphasis on HSP's senior level mandates across strategies and sectors. Jen has a no-nonsense, results-oriented approach and a knack for assessing the right cultural fit. While she has executed numerous mandates across a variety of industries, she has extensive experience working with HSP's energy and infrastructure focused clients and has a natural affinity for the sector, given her Texan roots. Prior to joining HSP, Jennifer spent four years at JPMorgan, working with ultra-high net worth clients in the Private Bank.

Education:
University of Texas in Austin, McCombs School of Business – BBA in Finance, Graduate of the Business Honors Program

University of Virginia, Darden School of Business – Master's in Business Administration

Mother of three (Four if you count her Bernese Mountain Dog, Boone), avid golfer and a true Texan at heart. Lover of skiing, hiking, wine tasting, and international travel.

Jaya K. Hathaway
Recruiter
CPI

Jaya joined CPI in 2011 and focuses on pre- and post-MBA recruiting for the Firm's investment clients across several strategies. Prior to joining CPI, Jaya worked at UBS Investment Bank as an Associate Director in the M&A Group, where she focused on sell-side and buy-side advisory engagements across multiple industries, including TMT, healthcare and power & utilities. While at UBS, Jaya worked in both the Los Angeles and New York offices, and participated in the company's Analyst and Associate recruiting efforts and summer internship programs. Jaya began her career at Fieldstone Private Capital Group, a boutique investment bank in New York. Jaya received a BS in Economics, cum laude, with concentrations in Marketing and Management from The Wharton School at the University of Pennsylvania. She also received an MBA, with honors, with concentrations in Finance and Accounting from the Wharton School. She is an active alumna of Penn.

Osei Van Horne*

Former Managing Director & Co-Founder, Technology

Wells Fargo Strategic Capital

Van Horne is a founding member and former Managing Director of the technology practice of Wells Fargo Strategic Capital, a ~$2 billion AUM growth and private equity investment vehicle. In this role, Van Horne was responsible for executing the investments and platform strategies, as well as recruiting and retaining personnel. Van Horne led and closed Wells Fargo's equity co-investments in Flexport, Notarize, Industrious, BMC Software, Reonomy, and Mynd, among others. Van Horne also sat on the investment committee of Wells Fargo's Diverse Asset Manager Initiative, which directs approximately ~$4 billion of private client capital toward emerging managers across several asset classes. Prior to launching Wells Fargo's technology practice, Van Horne had prior principal investment experience in the Merchant Banking Division at Goldman, Sachs & Co. During his tenure at Goldman Sachs, Van Horne executed equity and mezzanine debt transactions from a $1 billion AUM multi-strategy private equity fund targeting investments in ethnic minority-owned companies. Prior to joining Goldman Sachs, Van Horne was a mergers & acquisitions investment banker at Wells Fargo where he was responsible for executing transactions in business services and technology industries. Previous to this role, Van Horne worked in the United States Senate.

Mr. Van Horne serves on the Board of Advisors of Women's Venture Fund, a leading 501(c)(3) organization focused on providing financing and advisory solutions for women-owned small businesses in the New York Tri-State area. Van Horne is a mentor at All Raise, a 501(c)(3) organization focused on increasing the pipeline of women venture capital investors. He is a Board Advisor to the City and County of San Francisco's Office of Economic and Workforce Development's Information & Comm. Technology (ICT). Van Horne is a Private Equity Professor at Columbia University Graduate School of Business where he teaches Foundations of Private Equity. He has published several white papers concerning private equity process optimization, including, "Impact of Group-Buying Models on Small Business Purchasing: Pilot Research Analysis" published in the Spring 2013 Issue of Institutional Investor Journals - Journal of Private Equity.

Mr. Van Horne is a graduate of Howard University and he resides in New York with his wife, Gabryel, and two daughters, Kennedy and Briar.

Karim Assef

Chairman of Global Investment Banking

Bank of America Merrill Lynch

Karim T. Assef is a managing director and the Chairman of Global Investment Banking for Bank of America Securities (BAS). In this role, he helps ensure integrated, world-class delivery of advisory and capital markets services to major corporations and financial sponsors around the world.

Karim is a member of the Bank of America Operating Committee, the Global Corporate and Investment Banking (GCIB) Executive Committee, the Leveraged Finance Committee and the GCIB Business Selection Committee. He serves as the Chairman of Bank of America's Global Private Capital Council, focused on driving relationships with private capital providers on a global basis. Karim has also served as the executive sponsor of the Woman's Leadership Council and the Minority Equity Investment Program, directing growth capital to underserved entrepreneurs throughout the country.

Prior to assuming his current role in 2017, Karim served for four years as the Co-Head of Global Investment Banking, responsible for driving the firm's client strategy and building the bank's global capabilities and resources.

Previously, Karim served for eight years as the global head of BAML's Financial Sponsors Group, responsible for driving the bank's activities with major private equity firms and helping build the group into the market leader. Prior to heading the group, Karim spent 10 years as a senior banker, helping to establish and develop many of the firm's most important financial sponsor relationships and driving many of the industry's most notable private equity transactions.

Prior to joining the firm in 1996, Karim spent 8 years with the Chase Manhattan Bank where he held several leadership roles, primarily focused on providing acquisition financing and advisory services to corporate and private equity clients.

Karim holds an MBA from Columbia University Business School. He is a summa cum laude and Phi Beta Kappa graduate of Columbia College, receiving a BA with a dual major in Psychology and Economics. Karim serves on the Board of Directors of DREAM (f/k/a Harlem RBI), a non-profit organization providing critical educational support and mentorship to inner-city youth.

Jackson Cummings

Investor

Salesforce Ventures

Mario Ruiz*

Investor

PayPal Ventures

Mario Ruiz is a Principal at PayPal Ventures where he focuses on early and growth stage investments across fintech & commerce in the U.S. and Latin America. Mario also leads the day-to-day on PayPal's Limited Partner investment strategy in underrepresented emerging fund managers. Prior to joining PayPal, Mario was an investor at Napier Park, where he was a member of the investment team responsible for the evaluation, diligence, and execution of growth equity and real asset investments. Mario started his career as an investment banking Analyst and Associate at Barclays in New York.

Mario is the former co-chair of the Junior Leadership Board for the Sponsors for Educational Opportunity (SEO), which helps further the mission of the SEO Scholars educational program while also developing professionals into future non-profit board leaders. He is an alumnus of SEO's Career and Alternative Investments Fellowship Programs. Born and raised in the Bronx, NY, Mario received his BBA from Baruch College and his MBA from the Yale School of Management. While at Yale, Mario was a Managing Partner at First Round Capital's Dorm Room Fund and co-founded their Blueprint Track, an initiative to support aspiring underrepresented founders and investors.

Ama Adams
Partner
Ropes & Gray

Ama Adams' practice focuses on international transactions and the U.S. government's regulation of trade and investment. This includes most notably export controls, economic sanctions, anti-corruption and anti-money laundering, foreign direct investment and customs laws and regulations. She advises clients on these complex issues in a range of industries, including the financial services, aviation, biotechnology, life sciences, oil and gas, manufacturing, technology, and chemical sectors.

In addition to advising clients on the application of international trade regulations to their global business operations, Ms. Adams also assists clients in developing compliance programs, handling pre-and post-acquisition due diligence, conducting internal investigations relating to potential violations of trade laws and representing clients before the U.S. government agencies in connection with, license requests, enforcement matters, and government inquiries. She also advises clients on cross-border investment and national security matters, including national security reviews and investigations before the Committee on Foreign Investment in the United States (CFIUS). Ms. Adams has successfully represented a number of foreign and domestic clients through the CFIUS clearance process and regularly advises clients on managing CFIUS risks across investment scenarios.

Brandon Gay
Principal
The Carlyle Group

Brandon Gay is a Principal in The Carlyle Group's Legal & Compliance department. At Carlyle, he serves as the Chief Compliance Officer of one of the firm's registered broker-dealer entities, and also focuses generally on a broad spectrum of domestic and international legal and regulatory matters. Prior to joining Carlyle, Mr. Gay was a corporate and securities associate at Covington & Burling LLP. At Covington, Mr. Gay advised registered and unregistered investment advisers, including private equity funds, hedge funds and venture capital funds, on various status questions and ongoing compliance matters. Mr. Gay received his J.D. from the University of Pennsylvania Law School, a Certificate in Business and Public Policy from the Wharton School of the University of Pennsylvania, and a B.A. from Yale University.

Scott Weisman

Managing Director & Global Chief Compliance Officer

Bain Capital

Mr. Weisman joined Bain Capital in 2016. He is a Managing Director and the Firm's Global Chief Compliance Officer and Senior Regulatory Counsel based in Bain Capital's Boston office. Prior to joining Bain Capital, he was a Managing Director in the Financial Services Regulatory Practice at PricewaterhouseCoopers and earlier served as an Assistant Director in the SEC's Division of Enforcement.

Education

Mr. Weisman holds an LL.M. degree in Securities and Financial Regulation from Georgetown University, a J.D. from American University, and B.A. from the University of Pennsylvania.

Aaron Clubb
Partner
True Search

Aaron Clubb is a Partner within the Investment Professional practice at True Search based in Chicago. His search work consists of serving financial services clients including private equity & venture capital firms, banks, asset managers, endowments & foundations, pensions, and family offices.

Aaron also focuses on Diversity & Inclusion, partnering with companies to help increase the diversity of their senior levels and boards. He serves as a Board Advisor to AboveBoard, an inclusive platform for executive hiring. Over 50% of the executives Aaron has placed throughout his search career have been representative of gender or racial diversity.

Prior to joining True, Aaron served as a member of the Financial Services, Private Equity, and Diversity practices at Heidrick & Struggles. He began his career with The Sanneh Foundation as the Founder & Director of the DreamLine Corps program. Aaron currently serves on the board of the LEARN Charter School Network and the Firehouse Community Arts Center.

Gena Ashe

General Counsel & Corporate Secretary

Anterix

Gena Ashe is currently the General Counsel and Corporate Secretary for Anterix Inc. (NASDAQ:ATEX), a publicly traded wireless telecommunications company based in Woodland Park, N.J., where she leads the Company's legal strategy and supports the Company's Executive Leadership Team and Board of Directors. Prior to joining Anterix, Ms. Ashe was the Chief Legal Officer and Corporate Secretary of Adtalem Global Education (NYSE:ATGE), a top global proprietary education and certification enterprise. Before Adtalem, Ms. Ashe spent eight years as Chief Legal Officer in the private equity space, including serving as Chief Legal Officer and Corporate Secretary for the former KKR portfolio Company, BrightView Solutions (NYSE:BV), for four years leading up to its IPO. Prior to her most recent roles, Ms. Ashe held several Senior Executive Legal roles for companies including IBM, AT&T (where she led the Wireless Legal Team), Lucent Technologies (where she served as Chief Regulatory Counsel), Darden Restaurants, and PBS, after initially beginning her career with IBM as a microcomputer-based design Electrical Engineer & Scientist.

In addition to her role as Anterix's Chief Legal Officer, Ms. Ashe is on the Board of Greenwich, CT based XPO Logistics, Inc. (NYSE:XPO), a Fortune 200 global leader in transportation and logistics, and on the Board of publicly traded Lyon, France based XPO Logistics Europe SA (formerly Norbert Dentressangle) (ENX:XPO), where she serves as Vice Chairman of the Board of Directors. In the private equity arena, Ms. Ashe serves on the Board of Directors of Cold Bore Capital Management portfolio company, ALP Partners, LLC. Ms. Ashe's current non-profit directorships include, the Board of Trustees of Spelman College, the Board of Directors of the Executive Leadership Council ("ELC"), where she also chairs the Private Company segment of ELC's Corporate Board Initiative, and the Law Advisory Board for Georgetown University in Washington, D.C.

Ms. Ashe holds a Juris Doctorate from Georgetown University, a Master of Science in Electrical Engineering from the Georgia Institute of Technology ("Georgia Tech"), and a Bachelor of Arts in Mathematics with a Physics minor from Spelman College, from which she graduated summa cum laude and class valedictorian.

Throughout her career, Gena has been sponsored at a number of world-class continuing education programs including completing the Executive Development program at the Wharton School of the University of Pennsylvania, receiving an M&A Certification from the University of Chicago/Booth School, and receiving certifications from the National Association of Corporate Directors ("NACD"), Deloitte, McKinsey and Oxford University in the UK. Based on her impressive board service, Gena has also received a number of respected national awards and recognitions including being named to the NACD "Corporate Directorship 100" (2018); Women Inc. Magazine (Most Influential Corporate Directors) (2019); and Savoy Magazine (Most Influential Black Corporate Directors) (2018), to name a few.

Lucinda Duncalfe

Chief Executive Officer

AboveBoard

Lucinda Duncalfe is Founder/CEO of AboveBoard, an inclusive network for executive hiring. She also serves as a director of WireSecure, which secures transactions in private equity. In her 25-year career as a technology CEO, Lucinda founded and/or led venture capital-backed technology companies including Monetate (acquired by Vista,) ClickEquations (acquired by Channel Intelligence,) and TurnTide (acquired by Symantec.) She has served on many for and not for profit boards. Lucinda has won numerous awards, including the Ernst & Young Entrepreneur of the Year in Philadelphia, and was one of Consulting Magazine's 25 Most Influential Consultants for her work with financial services clients. Lucinda has a BA from University of Pennsylvania, where she played basketball, and an MBA from the Wharton School. She attended the Aspen Seminar, Outward Bound, and the National Outdoor Leadership School. She is also an Eisenhower Fellow.

Nedu Ottih
Principal
Apax Partners

Nedu Ottih is a Principal in the Services team. He joined Apax Partners in 2012 and is currently based in New York. Nedu's Apax deal experience includes Lexitas, AssuredPartners, Authority Brands, MyCase, Quality Distribution, Tosca Services, and the take-private of Garda World Security Corporation.

Prior to joining Apax Partners, Nedu was a management consultant at McKinsey & Company's Corporate Finance practice in New York, where he advised clients from financial services and other industries.

Nedu holds a BS and MS in Management Science and Engineering from Stanford University and an MBA from Harvard Business School.

Nedu serves as a Director of AssuredPartners, Authority Brands, Lexitas, MyCase, Quality Distribution and Tosca Services.

From sourcing new investment opportunities, evaluating companies and ultimately influencing the trajectory of portfolio companies, Nedu finds the multi-faceted nature of private equity extremely rewarding. He credits his parents for instilling in him a strong sense of intellectual curiosity from an early age. Nedu enjoys learning about new sectors and business models, helping world-class management teams drive improvements to their businesses, and ideating and problem solving with his colleagues.

Natalie Walker
Partner
StepStone Group

Ms. Walker is a member of the private equity team, focusing on US-based small-market managers and secondary investments. Prior to StepStone, Ms. Walker was a research analyst at Oppenheimer & Co., a leading national investment bank and full-service investment firm offering investment banking, financial advisory services, capital markets services, asset management, wealth management, and related products and services worldwide. Ms. Walker was a member of Oppenheimer's private equity team, where she conducted due diligence and research on private equity funds, secondary investments and co-investments. Before that she worked for a private equity-backed start-up and women-owned business enterprise, Sundance Energy. Ms. Walker received her BA from Georgetown University McDonough School of Business.

Jeffrey Armbrister

Head of Direct Equity Investments

Hamilton Lane Advisors

Jeff is a Managing Director and the Global Head of Direct Equity Investments where he is responsible for direction and oversight of the firm's direct equity investment platform.

Jeff has over 20 years of private equity and public market investing experience, and has served on the board of directors of several portfolio companies and non-profit organizations. Prior to joining Hamilton Lane in 2018, Jeff was a Managing Director at Versa Capital Management, where he focused on making control-oriented, special situations, debt and equity investments in middle market companies across a variety of industries. While at Versa, Jeff participated in all major investment functions and his responsibilities included origination, underwriting, transaction execution and portfolio company development. Prior to joining Versa in 2003, Jeff was an Equity Research analyst at Oppenheimer + Close. He has also held private equity, venture capital, corporate development and investment banking positions at Berwind Financial Group, Redleaf Group, ICG Commerce and Wheat First Butcher Singer, respectively.

Jeff received a B.A. in Economics from the University of Virginia.

Joshua Blaine

Senior Managing Director

Blackstone Strategic Partners

Joshua S. Blaine is a Senior Managing Director, having joined Strategic Partners in 2001. Mr. Blaine sits on the Investment Committee for each of the Strategic Partners funds and is currently an advisory board member of multiple funds. In 2004, he founded the Strategic Partners London office and covered the European market prior to returning to New York in early 2006. Prior to joining Strategic Partners, he worked in the Private Fund Group at JPMorgan Chase & Co., where he was part of a small dedicated team responsible for selling almost $2 billion of the firm's private equity partnership interests through a series of secondary market transactions. He previously worked in the Corporate Finance Department at UBS. Mr. Blaine is currently a member of the Tulane Fund Advisory Board and Tulane Business School Council. Mr. Blaine received a B.S.M. cum laude in Finance from the A.B. Freeman School of Business at Tulane University.

Olga Kosters

Head of Private Debt Secondaries

Tikehau Capital

Olga Kosters joined Tikehau Capital in 2019 to head the Private Debt Secondaries investment strategy. Olga has twenty years of investment and structuring experience in private and public capital markets. Prior to joining Tikehau Capital, she advised large institutional investors on US private credit strategies while at StepStone Global and led the execution of corporate private debt strategy at Zurich Insurance Group. Prior to this Olga has held several positions at the European Bank for Reconstruction and Development in London.

Education: Hofstra University, Kahabarovsk State University

SEO AICON

Jenna Shen

Managing Director

Goldman Sachs Vintage Funds

Jenna Shen is a Managing Director of the Goldman Sachs Vintage Funds. With over $38 billion in committed capital since inception, the Vintage Funds have been innovators in the secondary market for over 20 years. Investing globally and across a range of asset classes, the Vintage Funds provide liquidity, capital and partnering solutions to private market investors and managers worldwide. Jenna joined Goldman Sachs in 2007 in the Investment Banking Division, focusing on the technology, media and communications sectors. She has been a member of the Vintage Funds investment team since 2011 and is a member of the Vintage Funds Investment Committee. Prior to joining the firm, she received a BA, with honors, from Stanford University.

Clinton Stevenson

Investment Director

California Public Employees' Retirement System (CalPERS)

Clinton L. Stevenson joined CalPERS as an Investment Director in March 2017. As the Investment Director of Investment Manager Engagement Programs, he provides coordination across all of CalPERS' asset classes. Specific areas of focus are emerging & transition managers.

Mr. Stevenson has more than 35 years in the investment industry including 30 years at the Ford Foundation, where, as the director of Investment Administration, he pioneered the Foundation's investments in U.S. and non-U.S. small capitalization stocks, emerging market equity, emerging market debt and private real estate. He also directed the Foundation's investment operations and proxy voting. In addition, he founded a firm that advised not-for-profit institutions on the structure, management, and governance of their investment programs.

Mr. Stevenson earned a bachelor's degree from Coe College in Cedar Rapids, Iowa with a double major in Mathematics & Economics. He received an MBA from the Stanford University Graduate School of Business and an MA from Stanford University's Doctoral Program in Economics.

Stephen Cammock*

Executive Director

GCM Grosvenor

Mr. Cammock focuses on private equity, more specifically on emerging managers, middle market buyout and diverse managers. Mr. Cammock has extensive experience in underwriting co-investments, growth equity, and secondary investment opportunities, and is involved with deal sourcing and client relationship management. Mr. Cammock is a recipient of the 2015 National Association of Investment Companies (NAIC) Rising Star Award. Mr. Cammock received his Bachelor of Arts in History from Yale University.

Reginald Sanders*

Director of Investments

W.K. Kellogg Foundation

Reginald G. Sanders, CFA, CAIA is Director of Investments for the W.K. Kellogg Foundation, reporting to the Chief Investment Officer. In his role as a member of the foundation and the W.K. Kellogg Foundation Trust investment team, Mr. Sanders is responsible for investment policy and strategy, portfolio management, investment research and external manager due diligence across asset classes.

Prior to the W.K. Kellogg Foundation, Mr. Sanders was Manager of Pension Investments for Eastman Kodak Company, where he was primarily responsible for managing the alternative asset classes, which included the hedge fund and illiquid investment programs, for the company's U.S., U.K., and Canadian pension plans. Prior to Eastman Kodak, Mr. Sanders was an equity research analyst for AEW Capital Management. Mr. Sanders also has prior equity research analyst experience with both T. Rowe Price Associates, Inc. and GW&K Investment Management. Additionally, Mr. Sanders was a utilities industry analyst for A.G. Edwards & Sons, Inc.

Mr. Sanders holds a Bachelor of Science degree in accounting from Florida A&M University and a Masters in Business Administration from Harvard Business School, where he was a Robert A. Toigo Fellow. Mr. Sanders has previously served in the Office of President for the Toigo Alumni Association. Mr. Sanders currently sits on the State for the State of Michigan Investment Board, which oversees over $100 billion in defined benefit and defined contribution assets for the Michigan Retirement Systems, and on the Investment Advisory Committee of the $3 billion Harry and Jeanette Weinberg Foundation in Baltimore, Maryland.

Patricia Miller Zollar

Managing Director

Neuberger Berman

Patricia Miller Zollar is a Managing Director of Neuberger Berman and a leader of the Firm's Private Investment Portfolios practice. She is a member of the Co-Investment and Private Investment Portfolios Investment Committees. Additionally, Ms. Zollar sits on the Limited Partner Advisory Boards of a number of funds including those managed by Arcadius Capital Partners, Argand Partners, Base10 Ventures, Clearlake Capital, GenNx360 Capital Partners, Linx Partners, Vista Equity Partners and The Vistria Group. Before the management buyout of Neuberger, Ms. Zollar co-headed and co-founded the Lehman Brothers Partnership Solutions Group, a Wall Street business focused on developing strategic opportunities with women- and minority-owned financial services firms. The innovation of the Partnership Solutions Group was chronicled in a case study for the Harvard Business School. Before rejoining Lehman Brothers in 2004, Ms. Zollar was a vice president in the Asset Management Division of Goldman Sachs. Ms. Zollar began her career as a Certified Public Accountant in the Audit Division of Deloitte & Touche. She received her MBA from Harvard Business School and her BS, with highest distinction, from North Carolina A&T State University, where she formerly served as Chairperson of the Board of Trustees and which conferred her an honorary Doctorate degree. Ms. Zollar is a member of the Executive Leadership Council, the Economic Club of NY, the Harvard Business School Alumni Board and was a former member of the executive board of the National Association of Investment Companies. She serves on the executive board of The Apollo Theater and on the Investment Committee of the Robert Wood Johnson Foundation's Board of Trustees.

Raina Singh

Vice President, Alternative Investments

SEO

Raina Singh is the Vice President of SEO's Alternative Investments program. Her responsibilities include managing the highly competitive Alternative Investments Fellowship Program (AIFP), the annual Alternative Investments Conference (AICON), and various other programming, with the goal of increasing the success of underrepresented populations in the alternative investments space.

Prior to the role on the Alternative Investments team, Raina was part of the SEO Scholars, College team, where she was critical in helping streamline tasks and address the challenges brought on by the rapidly increasing number of college students served. Before SEO, she worked in a number of other education nonprofits, with a focus on using technology to bridge the learning gap. Raina also has over five years of consulting experience at both Accenture Consulting and Monitor Group. She has worked extensively not just in the US, but also in India, and has had exposure to working in Africa through her consulting engagements.

Limited Partner Advisory Council (LPAC)

SEO's LPAC is comprised of investors whose combined assets under management exceed $1 trillion. The LPAC guides SEO in its expanding work in the alternative investments sector and participates in select SEO program activities.

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SEO Scholars is a free, eight-year academic program that gets public high school students in New York City and San Francisco to and through college – **with a 90% college graduation rate.**

SEO ensures that our Scholars are prepared for admission to competitive colleges and experience a rich and rewarding college education. In high school, the SEO Scholars program includes:

- Several hundred hours of SEO classes on Saturday, after school, and during the summer
- Tutoring
- One-on-One Mentoring
- Summer Enrichment Programs
- College Admissions Advising

In college, SEO supports students through the myriad challenges they may face as low-income, first-generation college students by including:

- College Readiness Workshops
- Individualized Academic Advising
- One-on-One Support
- Career Exploration and Networking Events

90%

of SEO Scholars graduate from a four-year college

2,000+

high school and college students served annually

85%

of SEO Scholars are first-generation college graduates

75%

of SEO Scholars attend a school ranked as top-100 in *U.S. News & World Report*

For more info, visit **seoscholars.org**

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SEO Scholars

SEO Career is the nation's premier program for recruiting and training high-achieving students who have been historically excluded in industries across Wall Street and Corporate America, which include Black, Latinx, and Native American college students, for challenging summer internships. What sets us apart is a combination of coaching, training, exposure, high standards, and a powerful, lifelong alumni network.

80%
of SEO Career Interns receive full-time offers from SEO partner companies

700+
college students in the SEO Career Summer Intern Class of 2021

120+
partner companies offering internships in 39 cities

40+
years of matching talent with opportunity

7,000+
USA alumni

Internship Areas:

Asset Management	Investment Research	Real Estate
Consulting	Marketing	Sales
Finance/Accounting	Operations	Sales & Trading
Human Resources	Private Credit	Technology
Investment Banking	Private Equity	Transaction Services

SEO Law helps future lawyers thrive in law school and excel in their careers. Through our two program initiatives, the SEO Law Fellowship and Catalyst by SEO Law, aspiring, underrepresented pre-law students receive access to critical educational, career development, and internship opportunities that propel them to succeed in the legal profession.

145

Fellows in the Class of 2021

45

SEO Law partners in 13 cities around the nation

1,700+

SEO Law alumni

Fellows have become:

- Lawyers
- Advocates
- Business leaders
- Politicians

SEO Alternative Investments is an industry-wide program that provides education, exposure, training, and mentorship opportunities to high-achieving professionals who have been traditionally underrepresented in the alternative investments sector.

Through our **Alternative Investments Fellowship Program (AIFP)**, Fellows receive in-depth development, including intensive mock interviews, case studies, financial modeling, and exposure to breakfast seminars led by senior management from AIFP partner firms.

Through our annual **Alternative Investments Conference (AICON)**, we strengthen access and provide career development opportunities for professionals at every point in the investing chain by facilitating connections among historically excluded managers and limited partners, including one-on-one meetings.

We do this with the support, counsel, and expertise of our **Limited Partner Advisory Council (LPAC)**, who share our vision of helping emerging talent access opportunities in the alternatives industry. With the LPAC's involvement, we provide emerging managers various platforms and opportunities to network with limited partners.

90%

of Alt. Investments Fellows secure full-time roles in the sector

130+

candidates in pipeline for 2021 AIFP

50+

Alt. Investments partners

SEO Alternative Investments

SEO Leadership Institute

Launched in 2020, our newest program, the SEO Leadership Institute, provides on-going development for SEO alumni, customized for each stage of their career. There are three distinct features to the Leadership Institute: making connections, professional and personal development, and civic engagement. Our Leadership Institute develops our alumni into the leaders who will realize SEO's mission of creating a more equitable society.

Special thank you to the Robert Wood Johnson Foundation for generously funding the SEO Leadership Institute.

AboveBoard, accenture, CHRONUS (Unleash the Power of Mentoring), HARVARD ManageMentor / Spark., MASTERCLASS, PARADIGM ONE, Robert Wood Johnson Foundation, Springboard (Partners in Cross Cultural Leadership), thrive, worthi by citi

10,000+

Alumni Across the USA

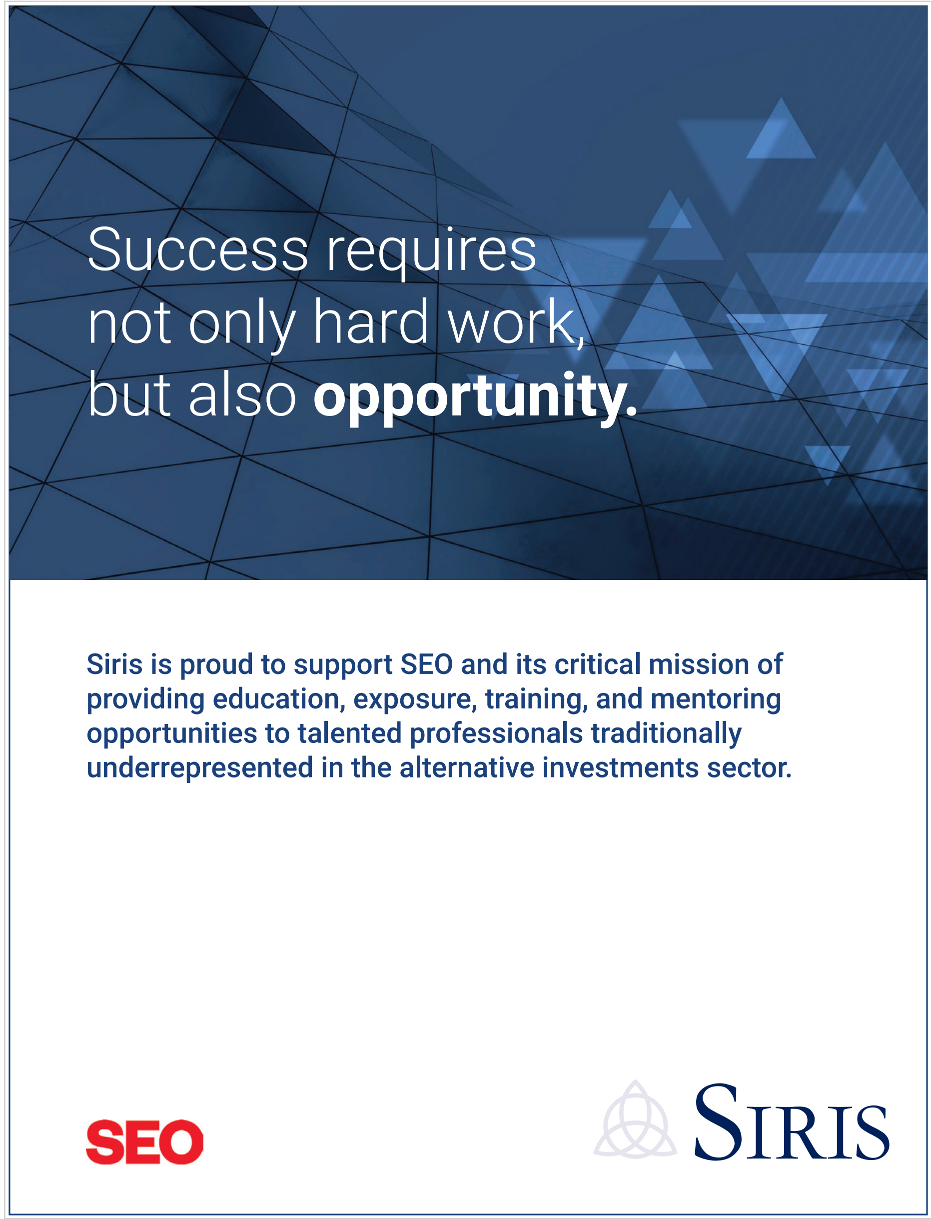
19,000+

Alumni Around the Globe

9+

Leadership Institute partners

SEO Leadership Institute


Success requires
not only hard work,
but also **opportunity.**
Siris is proud to support SEO and its critical mission of providing education, exposure, training, and mentoring opportunities to talented professionals traditionally underrepresented in the alternative investments sector.
SEO
SIRIS


Oaktree is proud to co-sponsor the
12TH ANNUAL SEO ALTERNATIVE INVESTMENTS CONFERENCE
Oaktree is a leader among global investment managers specializing in alternative investments, with $148 billion in assets under management[1] as of December 31, 2020. The firm emphasizes an opportunistic, value-oriented and risk-controlled approach to investments in credit, private equity, real assets and listed equities. The firm has over 1,000 employees and offices in 19 cities worldwide.
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Marlin Equity Partners is proud to partner with and support SEO's mission
to advance diversity and promote opportunities within private equity.
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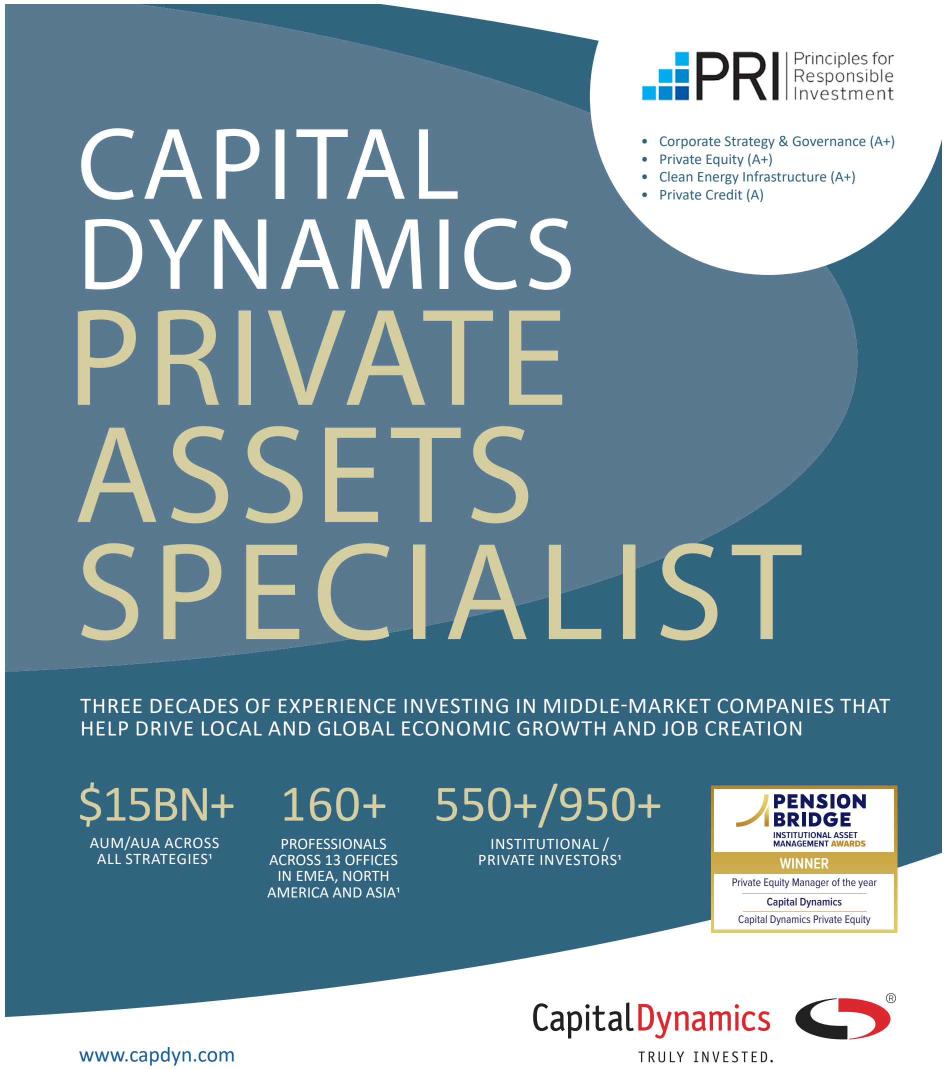
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Corporate Strategy & Governance (A+)
Private Equity (A+)
Clean Energy Infrastructure (A+)
Private Credit (A)
CAPITAL DYNAMICS
PRIVATE ASSETS SPECIALIST
THREE DECADES OF EXPERIENCE INVESTING IN MIDDLE-MARKET COMPANIES THAT HELP DRIVE LOCAL AND GLOBAL ECONOMIC GROWTH AND JOB CREATION
$15BN+
AUM/AUA ACROSS ALL STRATEGIES[1]
160+
PROFESSIONALS ACROSS 13 OFFICES IN EMEA, NORTH AMERICA AND ASIA[1]
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Neuberger Berman is a leading global private equity and credit investor that seeks to deliver strong investment results for our clients. Our team is driven to build attractive private equity portfolios by partnering with lead private equity firms and investing in unique opportunities. Our culture is rooted in the pursuit of investment insight and continuous innovation on behalf of clients.

We are proud to sponsor the SEO Alternative Investments Conference

SEO

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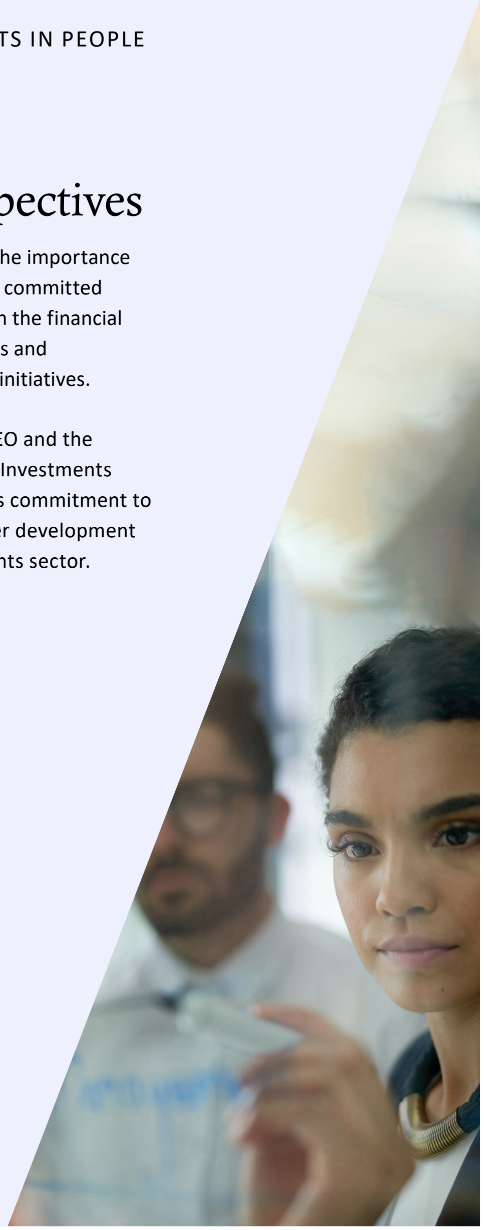
Adams Street understands the importance of investing in people and is committed to increasing diversity within the financial markets by enhancing access and contributing to educational initiatives.

We are proud to support SEO and the Twelfth Annual Alternative Investments Conference and share SEO's commitment to increasing access and career development in the alternative investments sector.

For more information, visit adamsstreetpartners.com



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Success is most valuable when it's shared.

At Ardian we believe investment success depends on many people working together to create value that is real and sustainable. That's why we share that value widely – with our investors, partners, investee companies and their employees. Following this path has helped us to become one of the largest private investment managers in the world, with $110bn under management or advised.
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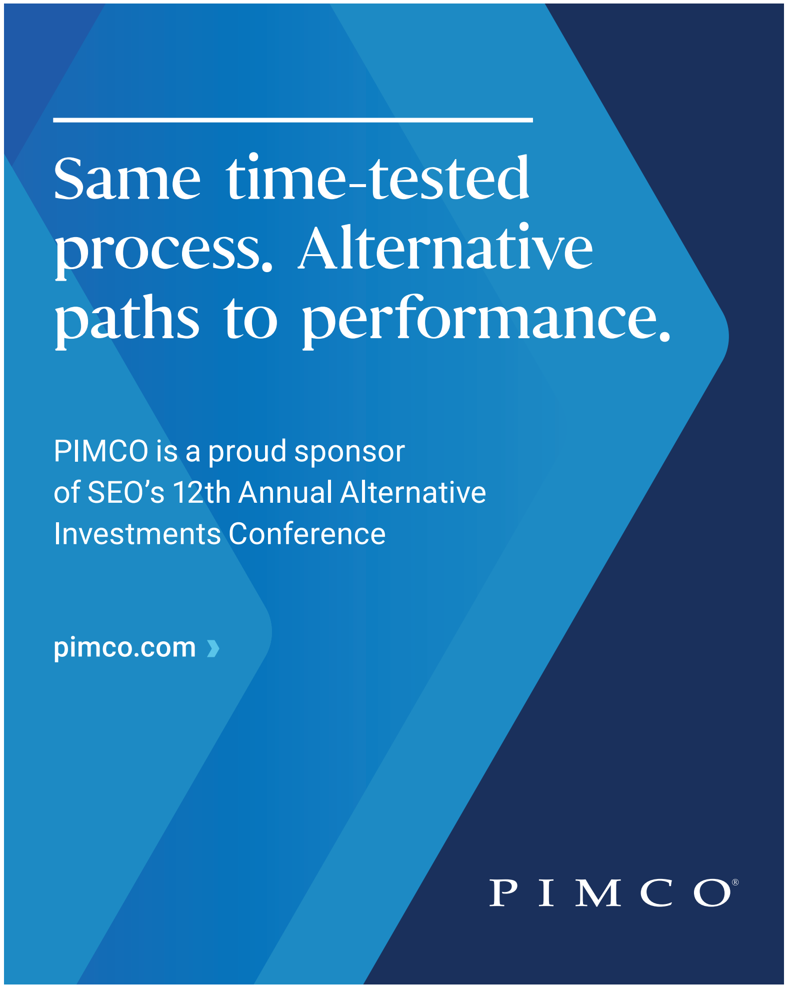
*As of December 31, 2020



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For over 50 years, SEO has been an innovator in education and job preparation. We support SEO's mission of creating opportunities for talented and diverse professionals in the alternative investments sector.

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Founded by the Rockefeller, Mellon and Harriman family interests and S.G. Warburg & Co. in 1968, AEA Investors is a pioneer in the private equity industry with an unparalleled global network of investors, business leaders and sector-focused industry professionals.

135+

With over 135 employees, including ~90 investment professionals, AEA's experienced and focused team leverages deep industry knowledge and exceptional operational expertise.

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With over $15 billion under management, AEA is a leader in global, middle-market private investing.

16

With an average tenure of 16 years for AEA's Investment Partners, our unique approach to talent development and retention is led by the belief that our people are our greatest assets.

Bain Capital is delighted to support SEO's ongoing efforts to provide education and access to underrepresented professionals in the alternative investments sector. We are proud to partner with SEO to promote diversity in our industry and beyond.

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Clearlake Capital Group, L.P. is a leading private investment firm founded in 2006. With a sector-focused approach, the firm seeks to partner with world-class management teams by providing patient, long-term capital to dynamic businesses that can benefit from Clearlake's operational approach, *O.P.S.*® Since inception, Clearlake has managed $30 billion of institutional capital.

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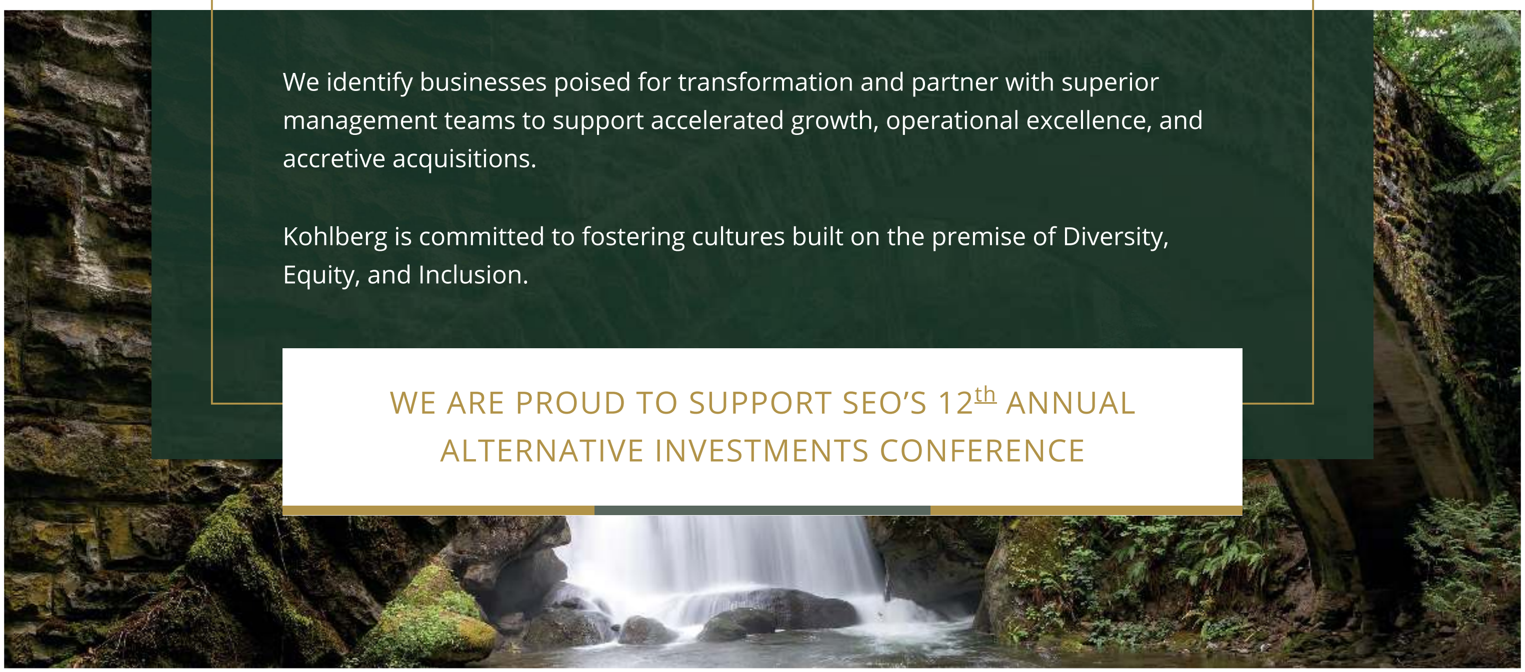


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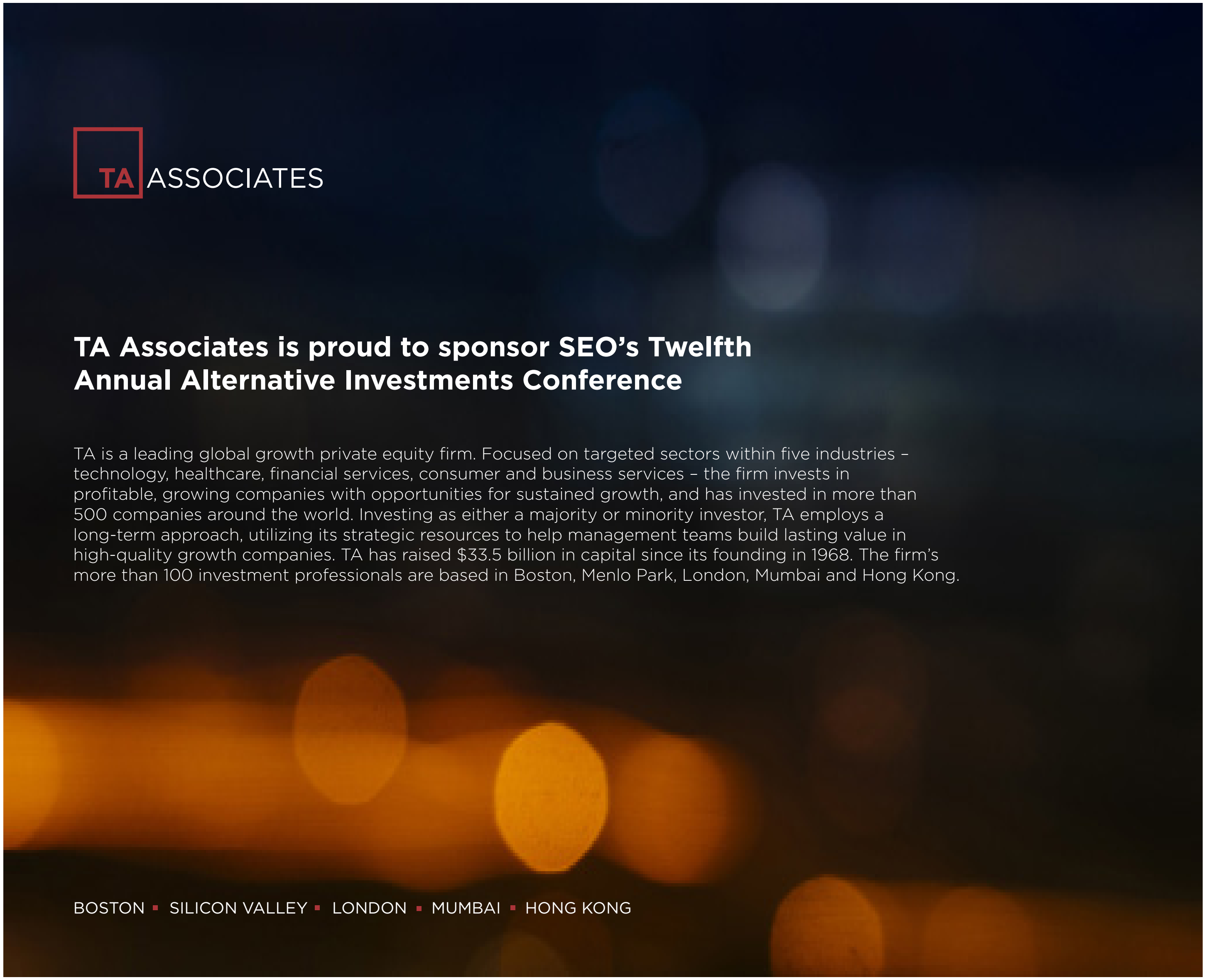
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TA is a leading global growth private equity firm. Focused on targeted sectors within five industries – technology, healthcare, financial services, consumer and business services – the firm invests in profitable, growing companies with opportunities for sustained growth, and has invested in more than 500 companies around the world. Investing as either a majority or minority investor, TA employs a long-term approach, utilizing its strategic resources to help management teams build lasting value in high-quality growth companies. TA has raised $33.5 billion in capital since its founding in 1968. The firm's more than 100 investment professionals are based in Boston, Menlo Park, London, Mumbai and Hong Kong.
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Wafra is proud to sponsor the 2021 SEO Annual Alternative Investments Conference and promote diversity in the alternative investment industry.
Wafra is a global alternative investment manager headquartered in New York with approximately $25 billion of AUM.
*Estimated AUM as of 12/31/2020.
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SEO 2021 ANNUAL Virtual AWARDS DINNER

Tuesday, April 20, 2021
7:00 pm EST

FIRESIDE CHAT SERIES, APRIL 1, 2021

7:00 pm - 7:30 pm:

Frank Baker, *Co-Founder & Managing Partner*, Siris Capital Group, LLC and SEO '92 Alumnus

Henry R. Kravis, *Co-Chairman and Co-CEO*, Kohlberg Kravis Roberts & Co.

7:30 pm - 8:00 pm:

Marc Benioff, *Chair and CEO*, Salesforce

HONOREES:

FRANK BAKER

MARC BENIOFF

DINNER CO-CHAIR:

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Chairman and Chief Executive Officer,
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