13TH Annual

# SEO AICON

## Alternative Investments Conference


Forging the Path Forward...

# **Conference** Programming

SEO Alternative Investments

**Wednesday, April 6, 2022**

The Glasshouse
660 12th Ave, New York City

**The SEO Alternative Investments Conference promotes diversity by providing education, access, and career development for young and experienced professionals who have been historically excluded from 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 59-year history of providing talented and motivated young people who have been historically excluded from educational and career opportunities.

## Limited Partner Leadership Breakfast

Welcome Speaker
**William A. Goodloe****
**President & CEO**
SEO

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

Introduction
**Kathlika Fontes**
**Director of**
**Investor Relations**
Grain Management

Fireside Chat
**Julian Salisbury****
**Global Co-Head of**
**Asset Management**
Goldman Sachs

Fireside Chat
**Kimberly Sargent**
**Chief Investment Officer**
The David & Lucile
Packard Foundation

## General Conference

Fireside Chat
**Henry R. Kravis****
**Co-Founder &**
**Co-Executive Chairman**
KKR

Fireside Chat
**General Stan McChrystal**
**(US Army, Ret.)**
**Founder &**
**Chief Executive Officer**
McChrystal Group

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

Moderator
**Anastasia Titarchuk**
**Chief Investment Officer**
New York State Common
Retirement Fund

Moderator
**Patricia Miller Zollar**
**Managing Director**
Neuberger Berman

Moderator
**Kevin Naughton**
**Managing Director and Chief**
**Capital Formation &**
**Investor Relations Officer**
Grain Management

**Dear Friends,**

Greetings to all those gathered this week for the 13th Annual Alternative Investments Conference hosted by SEO. Since 1963, SEO has organized training and internship programs to prepare young people from historically excluded groups for success and service.

Committed to creating opportunities for the next generation, SEO offers mentoring, academic assistance and specialized training. The theme of this year's conference is *"Forging the Path Forward."* A focus of the event will be SEO's Alternative Investments program, which highlights a dynamic and innovative sector of the market through educational panels and networking opportunities. The conference brings together talented young professionals from diverse backgrounds with leading experts in private equity, hedge funds, and other asset classes to explore strategies, reflect on recent challenges, and share ideas. The groundwork for the conference begins years earlier with SEO's innovative efforts to prepare secondary school students for success in higher education. The free SEO Scholars initiative is a multi-year academic program aimed at helping low-income public high school students earn acceptance to college and arrive ready to succeed. The dedicated officers, board, staff, and supporters of SEO, together with the SEO Alternative Investments team, are cultivating diversity and building a more equitable and prosperous future.

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 SEO, together with the SEO Alternative Investments team, are cultivating diversity and building a more equitable and prosperous future."

**Dear Friends,**

It is my pleasure to extend best wishes to all attending SEO's 13th Annual Alternative Investments Conference.

For years, SEO has brought together leaders and professionals at the Alternative Investments Conference to generate much needed exchange around broadening access and promoting talent in the finance industry. SEO continues to be a force for positive change by expanding opportunity for historically excluded professionals. Its efforts to strengthen diversity through the commitment and activity of alumni and supporters are truly commendable.

I share SEO's dedication to building a stronger and more sustainable economic future and look forward to all they will accomplish in the coming year. Diversity is an economic imperative and we all must support this goal.

Sincerely,

**Brad Lander**
New York City
Comptroller

THE CITY OF NEW YORK
OFFICE OF THE COMPTROLLER
BRAD LANDER

"SEO continues to be a force for positive change by expanding opportunity for historically excluded professionals."

**Dear Friends,**

Welcome to SEO's 13th 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 today.

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 particularly grateful to our Conference Underwriting Sponsors, Grain Management, Oaktree Capital Management & Thoma Bravo, in addition to our Alumni Underwriting Sponsor, Siris Capital Group, and our Official Law Sponsor, Ropes & Gray.

In 2009, 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 63 partner firms listed in this journal, with more to come. The SEO Fellowship program provides education, training, and mentoring to strengthen the skills of first- through third-year analysts and consultants, 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 organizations for partnering with SEO in preparing underrepresented talent for opportunities in the alternative investments sector: Akin Gump; Alkeon Capital Management; Artemis Real Estate Partners; Clearly Gottlieb; Crewcial Partners, LLC; Employees Retirement System of Texas; Ford Foundation; GCM Grosvenor; Kirkland & Ellis; Milbank LLC; 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 our collective impact.

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's 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 & Leadership Institute programs.

The Foundation's grant will help SEO continue to strengthen the pipeline of Black, Latinx, 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

## Underwriting Sponsors

Grain Management
Oaktree
Siris Capital Group, LLC
Thoma Bravo

## Official Law Sponsor

Ropes & Gray

## Presenting Sponsors

Bank of America
The Baupost Group
Blackstone
Crewcial Partners
Fitch Ratings
GCM Grosvenor
Marlin Equity Partners
Valor Equity Partners

## Premier Sponsors

Argand Partners
Avance
BlackRock
DPI Development Partners International
GH&A Garcia Hamilton & Associates, L.P.
Garda Capital Partners
HarbourVest
ICV Partners
KPS Capital Partners, LP
Neuberger Berman
Pantheon

## Leadership Sponsors

645 Ventures
ACA
Adams Street
Ardian
Black Opal Ventures
Brightwood
Campbell Lutyens
Capital Dynamics Truly Invested.
Cohere Capital
Goldman Sachs Asset Management
Hamilton Lane
Newlight Partners
PIMCO
Serent Capital
Standard General
StepStone inside private markets
Trident
Warburg Pincus

## Supporting Sponsors

PJT Park Hill
Vanguard

## General Sponsors

BharCap Partners
Elizabeth Park Capital Management
Heard Capital Nimble | Thoughtful | Deliberate
L2 Point

## Diversity Friends

Aksia
Amity Search Partners
Angeles Equity Partners
aqua
Blue Wolf
CPP
C Street Advisory Group
Fairview Capital
Glazer Capital Management
Henkel Search Partners
Muller & Monroe Asset Management, LLC
Pathway Capital Management
Sculptor Capital Management
Taconic Capital

### Marketing Partners

aaaim
Accelerate Investors
GCM GROSVENOR
MLT
naic National Association of Investment Companies
PEWIN

### Alternative Investments Fellowship Program (AIFP) Partners

abry partners
Advent International GLOBAL PRIVATE EQUITY
AEA
American Securities
APOLLO
BainCapital
THE BAUPOST GROUP
Berkshire Partners
BlackRock
Blackstone
Brookfield
The Carlyle Group
Centerbridge
Charlesbank
Clayton Dubilier & Rice
Clearlake Capital
CVC Capital Partners
DavidsonKempner Capital Management LP
Diameter
DigitalBridge
General Atlantic
Genstar Capital
Global Infrastructure Partners
Golden Gate Capital
Goldman Sachs
Gryphon Investors
Harvest Partners
HPS Investment Partners
ICG
TJC
KKR
Kohlberg & Company
KSL Capital Partners
Left Lane
LGP
Lexington Partners
LG Lindsay Goldberg
MDP
Maverick
Morgan Stanley
Newlight Partners
New Mountain Capital LLC
NEP Norwest Equity Partners
Oaktree
Palladium Equity Partners
Permira
Providence Equity
RCP Reverence Capital Partners
Senator
SilverLake
Sixth Street
SoftBank Investment Advisers
Stonepeak
Summit Partners
TA Associates
ThomaBravo
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

**8:00am - 9:15am** | **LP Breakfast**

Sponsored by:

GRAIN MANAGEMENT

Goldman Sachs | Asset Management

Welcome Speech

**William A. Goodloe****
**President & CEO**
SEO

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

Introduction

**Kathlika Fontes**
**Director of Investor Relations**
Grain Management

Fireside Chat (Plenary Session)

**Julian Salisbury****
**Global Co-Head of Asset Management**
Goldman Sachs

**Kimberly Sargent**
**Chief Investment Officer**
The David & Lucile Packard Foundation

**8:30am** | **General Registration Begins**

**9:30am - 9:45am** | **Opening Session**

Sponsored by:

GCM GROSVENOR

General Welcome/Opening Remarks

Welcome
**William A. Goodloe****
**President & CEO**
SEO

Emcee
**Renae Griffin**
**Executive Director**
GCM Grosvenor

## 9:45am - 10:35am

Sponsored by:

GRAIN MANAGEMENT

### Family Offices, Endowments, and Foundations Roundtable (Plenary Session)

Moderator
**Kevin Naughton**
**Managing Director and Chief Capital Formation & Investor Relations Officer**
Grain Management

Panelist
**Michael Buchman**
**Vice President & Chief Investment Officer**
Conrad N. Hilton Foundation

Panelist
**Caixia Ziegler**
**Managing Director of Real Assets**
MacArthur Foundation

Panelist
**Peter Ammon**
**Chief Investment Officer**
Penn Office of Investments

Panelist
**David Chiang**
**Chief Investment Officer**
Pritzker Family Foundations

## 10:45am - 11:35am

## Breakout Panel

Sponsored by:

BRIGHTWOOD

Capital Dynamics TRULY INVESTED.

OAKTREE

STANDARD GENERAL

### Credit: Manager Investment Insights (Breakout Room 1)

Leading Credit Fund Managers will provide insights to the current market and outline the opportunities their strategies look to capture amid today's volatile market landscape.

Moderator
**Ian Palmer, Managing Director**, PSP Investments

Panelists
**Robert Galeano**, **Head of Investor Relations,** Standard General
**Bryn Gostin**, **Managing Director**, Capital Dynamics
**Robert O'Leary**, **Global Co-Portfolio Manager & Head of North America,** Oaktree Capital Management
**Sengal Selassie***, **Chief Executive Officer & Founder,** Brightwood Capital Advisors

## 10:45am - 11:35am — Breakout Panel

Sponsored by:

The Baupost Group; Elizabeth Park Capital Management; Heard Capital (Nimble | Thoughtful | Deliberate)

### The Hedge Fund Investment Landscape (Breakout Room 2)

Leading hedge fund managers from a diverse set of investment specialties will share their insights on opportunities in the current market that are best captured through hedge fund strategies.

Moderator
**Karen Eifler, Vice President, Head of Marketable Securities,** Children's Hospital of Philadelphia

Panelists
**William Heard, Chief Executive Officer & Chief Investment Officer,** Heard Capital
**Kevin Reevey, Senior Research Analyst**, Elizabeth Park Capital Management
**Gregory Rudin, Principal,** The Baupost Group
**Fernando Vigil*, Founder & Chief Investment Officer**, Teca Partners

Sponsored by:

Cohere Capital; Ropes & Gray; Siris Capital Group, LLC; StepStone (inside private markets); Valor Equity Partners

### Private Equity: Macro Environment and Return to Fundamentals (Breakout Room 3)

In 2021, the private equity industry continued to see valuations rise as the economy recovers from COVID-19 and dry powder climbs to record levels. In light of recent macro events, our panelists discuss how they are thinking about managing their portfolios, and where they see the industry going in 2022 and beyond.

Moderator
**Lindsay Creedon, Partner,** StepStone Group

Panelists
**Joseph Haslip, Managing Director,** Valor Equity Partners
**Nik Shah, Managing Partner & Co-Founder,** Cohere Capital
**Suni Sreepada, Partner,** Ropes & Gray
**Afaf Ibraheem Warren*, Principal,** Siris Capital Group

Sponsored by:

645 Ventures; Fairview Capital

### Venture Capital: The Evolution of Stage-Specific Venture Investing (Breakout Room 4)

As venture capital matures as an asset class, historical stage-specific investing (e.g., a fund's focus on a specific stage of entry like a Series A) has evolved, creating new classes of investors and setting new risk-reward paradigms for LPs. This panel will explore the evolutions of stage-specific venture investing, and what that means for the future of the industry and asset class.

Moderator
**Vardan Gattani, Vice President,** 645 Ventures

Panelists
**Matt Brennan, General Partner,** TCV
**John Kim, Managing Director,** General Catalyst
**Rebecca Liu-Doyle, Managing Director,** Insight Partners
**Dr. Kola Olofinboba, Managing Partner,** Fairview Capital Partners



* indicates SEO Alumnus ** indicates SEO Board Member

| 11:45am - 12:35pm | Breakout Panel |
|---|---|

Sponsored by: Adams Street, Ardian, HarbourVest, Ropes & Gray

### Continuation Funds & Other GP-Led Secondaries (Breakout Room 1)

Continuation funds along with other structures have fostered a surge in growth of the GP-led secondaries market as more funds have looked at this as a portfolio management tool and an alternative to traditional exit routes. This session will deep dive into what this means for buyers, sponsors, and LPs and where this market may be headed.

Moderator: **Allen Ruiz,** **Managing Director, Private Assets,** Barings

Panelists:
**Joseph Goldrick,** **Partner,** Adams Street Partners
**Daryl Li,** **Senior Managing Director,** Ardian
**Rajesh Senapati,** **Managing Director,** HarbourVest Partners
**John Wang,** **Counsel,** Ropes & Gray

Sponsored by: BlackRock, Fitch Ratings, Hamilton Lane, Newlight Partners

### Impact Investing in Uncertain Times (Breakout Room 2)

This panel will explore the role of alternatives in impact investing as we emerge from a world of pandemic and geopolitical tensions. It will discuss the diversity of approaches to impact investing among the panelists, as well as the role of diversity within each organization's approach.

Moderator: **Mikiyon Alexander,** **Senior Director,** Fitch Ratings

Panelists:
**Kunle Apampa,** **Director and Head of Client Advisory & Partnerships,** Capricorn Investment Group
**Mark Longstreth,** **Partner,** Newlight Partners
**Katie Moore Sobuto,** **Managing Director,** Hamilton Lane
**Derrick Weatherspoon,** **Director & Senior Portfolio Manager,** BlackRock

Sponsored by: Bank of America, Blackstone, GCM Grosvenor

### GP Stakes (Breakout Room 3)

General Partner stakes in Private Equity businesses with a dynamic discussion around the history/evolution of GP stakes, how panelists identify businesses to invest in, incentives for businesses to give up equity, and outlook/areas of opportunities for the next generation of Private Equity businesses.

Moderator: **Bora Lim,** **Director,** Bank of America

Panelists:
**Stephen Cammock*,** **Executive Director,** GCM Grosvenor
**Gustavo Cardenas*,** **Managing Director,** Wafra
**Mustafa Siddiqui,** **Senior Managing Director,** Blackstone

## 11:45am - 12:35pm — Breakout Panel

Sponsored by:

AVANCE

CAMPBELL LUTYENS

Serent CAPITAL

**Navigating Today's Robust Fundraising Environment (Breakout Room 4)**

This panel will explore the ever-changing relationship between General Partners (GPs) and Limited Partners (LPs), as GPs of all sizes seek to raise new funds with record volumes and increasing velocity. It will discuss how LPs are becoming selective in a crowded market, the potential impact on the GP landscape, and how GPs can set themselves apart in this very competitive environment.

Moderator: **Rishi Chhabria, Partner,** Campbell Lutyens

Panelists:
**Greg Jania, Global Co-Head of Private Equity,** APG Asset Management
**Prital Kadakia, Partner,** Serent Capital
**David Perez, Co-Founder & Managing Partner,** Avance Investment Management
**Chirag H. Shah*, Senior Portfolio Manager,** Alaska Permanent Fund Corporation

## 12:50pm - 1:35pm

Fireside Chat (Plenary Session)

**Henry R. Kravis****
**Co-Founder & Co-Executive Chairman**
KKR

**General Stan McChrystal (US Army, Ret.)**
**Founder & Chief Executive Officer**
McChrystal Group.

## 1:35pm - 1:50pm

Sponsored by:

THOMABRAVO

Lunch & Reginald F. Lewis Award

Welcome
**William A. Goodloe****
**President & CEO**
SEO

Presented By
**Loida N. Lewis**
**Chair**
Reginald F. Lewis Foundation

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

## 1:50pm - 2:35pm

Sponsored by:

THOMABRAVO

Fireside Chat (Plenary Session)

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

**Anastasia Titarchuk**
**Chief Investment Officer**
New York State Common Retirement Fund

## 2:50pm - 3:40pm Breakout Panel

Sponsored by:

AMITY SEARCH PARTNERS, CPI, HENKEL SEARCH PARTNERS, SIXTH STREET, WARBURG PINCUS

### Career: Breaking into Alternative Investments (Breakout Room 1)

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 **Jennifer Nichols, Vice President, HCM,** Sixth Street

Panelists **Talar Angacian, Principal,** Henkel Search Partners
**Katherine Brackendorff Boyd, Recruiter,** CPI
**Stacy Levine, Partner,** Amity Search Partners
**Yoan Dipita N'Komba, Vice President,** Warburg Pincus

Sponsored by:

BHARCAP PARTNERS, BLACK OPAL VENTURES, CREWCIAL PARTNERS, MULLER & MONROE ASSET MANAGEMENT, LLC, TRIDENT

### Investing in Emerging & Diverse Managers: Insights from Active Investors (Breakout Room 2)

An insightful discussion around emerging & diverse manager investing – one of the fastest growing sectors within the alternative investments space. This session will explore emerging and diverse manager initiatives across a diverse set of investment strategies each targeting this sector in their own unique way.

Moderator **Angela Matheny, Director of Investment Staff & Diverse Manager, Equity,** Crewcial Partners

Panelists **Dr. Tara Bishop, Founder,** Black Opal Ventures
**André Rice, President,** Muller & Monroe Asset Management
**Bharath Srikrishnan, Managing Partner & Founder,** BharCap Partners
**Eric Taylor, Founder & Chief Executive Officer,** Trident

Sponsored by:

DPI Development Partners International

### Assessing Opportunity in Today's Emerging Markets (Breakout Room 3)

The emerging trends have shifted over the past decade while institutional investment exposure to these growing economies has dramatically increased. Our distinguished panel of emerging market investors will offer their perspectives on new opportunities and how they are managing risks in the current environment.

Moderator **Joanne Yoo, Partner,** Development Partners International

Panelists **Lauren Cochran, Vice President of Equity and Investment Funds,** DFC
**Arjuna Costa, Managing Partner,** Flourish Ventures
**Sophia Tsai, Managing Director,** Trinity Wall Street

Sponsored by:

PIMCO, Goldman Sachs Asset Management

### Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022 (Breakout Room 4)

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 **Andrew Siwo, Director of Sustainable Investments and Climate Solutions,** New York State Common Retirement Fund

Panelists **Ravi Anand, Executive Vice President, Portfolio Manager,** PIMCO
**Nora Creedon, Managing Director,** Goldman Sachs Asset Management
**James Simmons, Chief Executive Officer & Founding Partner,** Asland Capital Partners
**Shaunak Tanna, Head of Structured Investments,** Basis Investment Group

## 3:55pm - 4:45pm

Sponsored by:

NEUBERGER BERMAN

### Public Pension & Endowment Roundtable (Plenary Session)

Moderator
**Patricia Miller Zollar**
**Managing Director**
Neuberger Berman

Panelist
**Kathryn Gernert**
**Managing Director**
Texas Permanent School Fund

Panelist
**Michael Haddad**
**Interim Deputy Comptroller for Asset Management & Chief Investment Officer**
Office of New York City Comptroller

Panelist
**Kirk Sims**
**Head of Emerging Manager Program**
Teacher Retirement System of Texas

## 4:45pm - 6:00pm
**Networking Cocktail Reception**

## All Day
**Networking**

## All Day
**1:1 LP/GP Meetings**



* indicates SEO Alumnus ** indicates SEO Board Member

Welcome Speaker

**William A. Goodloe****

**President & CEO**

SEO

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

During William's tenure the number young people served annually has grown to 6000+ per year – a 900% increase. Along the way SEO has burnished its reputation for preparing young talent to succeed at competitive colleges, as well as at 300+ 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.

Welcome Speaker

**Kelly 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.

Introduction

**Kathlika Fontes**

**Director of Investor Relations**

Grain Management

Ms. Fontes is the Director of Investor Relations, responsible for developing and maintaining relationships with Limited Partners and their advisors and leading capital development processes.

Prior to Grain, Ms. Fontes was at StepStone Group as a lead client advisor. Previously, she held roles in investor relationship management with Deutsche Asset Management, constituent relationship management at American Cancer Society, and technology and strategy consulting at Accenture.

Ms. Fontes holds an M.B.A. from Columbia Business School and a B.S. in Electrical Engineering from the Georgia Institute of Technology. Ms. Fontes received her M.B.A. degree as a Robert Toigo Foundation Fellow, Management Leader for Tomorrow Fellow, and Board of Overseers Fellow.

Fireside Chat

**Julian C. Salisbury****

**Global Co-Head of Asset Management**

Goldman Sachs

Julian is global co-head of Goldman Sachs Asset Management. He is a member of the Management Committee and co-chair of the Firm-wide Investment Policy Committee. Julian is also co-chair of the Asset Management Investment committees, including those for private equity, infrastructure, growth equity, credit and real estate. He is also a member of the Board of Advisors of Launch With GS, Goldman Sachs' $1 billion investment strategy grounded in the firm's data-driven thesis that diverse teams drive strong returns.

Prior to assuming his current role, Julian was global head of the Merchant Banking Division. Prior to that, he was head of the Global Special Situations Group from 2013 to 2019 and head of the European Special Situations Group (ESSG) from 2008 to 2013, based in London. From 2007 to 2008, he worked in Moscow establishing ESSG's business covering the former Soviet Union,and was a founding member of ESSG in 2003.

Previously, Julian held roles in Bank Loan Research, High Yield Research and Product Control. He  joined Goldman Sachs in 1998, and was named managing director in 2005 and partner in 2008.

Prior to joining the firm, Julian worked in the audit practice of KPMG. He qualified as a chartered accountant in 1998 and is a member of the Institute of Chartered Accountants in England and Wales.

He serves on the Board of Trustees of The Nightingale-Bamford School and St. Bernard's School and is a member of the Board of Directors of SEO.

Julian earned a BSc in Sports Science and an MSc in Biomechanics from Loughborough University in 1993 and 1994, respectively.

Fireside Chat

**Kimberly Sargent**

**Chief Investment Officer**

The David & Lucile Packard Foundation

Kim Sargent serves as Chief Investment Officer. Prior to joining the Packard Foundation in February 2008, Kim was a consultant with McKinsey & Company's San Francisco office, and prior to that a senior analyst at the Yale Investments Office. Kim holds an M.B.A. from Stanford's Graduate School of Business, a B.A. from Yale University, and is a CFA charter holder. She is a member of the inaugural class of the Aspen Institute's Finance Leaders Fellows.

Emcee

**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).

## Kevin Naughton

**Managing Director and Chief Capital Formation & Investor Relations Officer**

Grain Management

**Moderator – Family Offices, Endowments, and Foundations Roundtable**

Mr. Naughton is a Managing Director and the Chief Capital Formation and Investor Relations Officer. He is responsible for leading capital formation processes and managing relationships with Limited Partners and their advisors.

Prior to Grain, Mr. Naughton was the Chairman and Co-Head of the Credit Suisse Private Funds Group. Previously, he was a distribution professional with Deutsche Bank Private Funds Group and a fixed income trader at Merrill Lynch. Mr. Naughton began his career as a college football coach.

Mr. Naughton holds a B.A. in History and minor in English from Middlebury College.

## Peter Ammon

**Chief Investment Officer**

The Penn Office of Investments

**Panelist – Family Offices, Endowments, and Foundations Roundtable**

Peter serves as Penn's Chief Investment Officer. Prior to joining Penn in July 2013, he worked at the Yale University Investments Office. At Yale, Peter was also a Senior Faculty Fellow at the Yale School of Management, where he co-taught a class on endowment management. Prior to his time at Yale, Peter worked at the Princeton University Investment Company.

Peter has served on a number of non-profit investment committees, including most recently at The Philadelphia School. Peter holds an AB in Politics from Princeton, an MA in International Relations from Yale University, and an MBA from Yale University.

## Michael Buchman

**Vice President & Chief Investment Officer**

Conrad N. Hilton Foundation

**Panelist – Family Offices, Endowments, and Foundations Roundtable**

Michael Buchman manages the Conrad N. Hilton Foundation's investment team and portfolio. Prior to joining the Hilton Foundation, Buchman worked in the areas of finance, real estate, and law at Broadway Partners, Citigroup Global Investment Bank, and the law firms of Fried Frank Harris Shriver & Jacobson, and Skadden Arps Slate Meagher & Flom. Buchman received a juris doctorate degree from the University of Pennsylvania Law School and a Master of Business Administration degree, and a bachelor's degree in economics, both from The Wharton School at the University of Pennsylvania.

## David Chiang

**Chief Investment Officer**

Pritzker Family Foundations

**Panelist – Family Offices, Endowments, and Foundations Roundtable**

David Chiang is the Chief Investment Officer of Pritzker Family Foundations and leads Ganesh Investments, the company that provides investment advisory services to the Funds and Partnerships group of PSP Partners and its affiliates. Ganesh Investments also provides investment advisory services to multiple Pritzker families and their foundations. Prior to joining Ganesh Investments in 2021, Mr. Chiang was Founder and Chief Investment Officer of Idyllic Partners, an outsourced CIO firm. Previously, Mr. Chiang served as Head of External Funds at Soros Fund Management, Managing Director at Wilshire Private Markets and also worked for GIC, Acon Investments, L Catterton and DLJ.

Mr. Chiang earned dual BA degrees in Business Economics and Psychology from Brown University and an MBA from UCLA's Anderson School Management. He currently serves on the Board of The Opportunity Network, a non-profit focused on helping underrepresented students gain access to high quality education and career opportunities.(NASP), Private Equity Women Investment Network (PEWIN), and the Real Estate Executive Council (REEC).

**Caixia Ziegler**

**Managing Director of Real Assets**

MacArthur Foundation

**Panelist – Family Offices, Endowments, and Foundations Roundtable**

Caixia is responsible for all aspects of MacArthur's real asset and sustainable investment portfolios, including strategy development and implementation, manager due diligence, selection and monitoring, performance reporting, and so on. 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, timber and infrastructure investments.

Caixia earned her bachelor's degree from Xiamen University in China and a Master of Business Administration degree from Wake Forest University. She is a Chartered Financial Analyst (CFA).

She is a Board member of Pension Real Estate Association and EPR Properties (NYSE: EPR).

**Ian Palmer**

**Managing Director**

PSP Investments

**Moderator – Breakout Panel: Credit: Manager Investment Insights**

Ian Palmer is Managing Director, Credit Investments at the Public Sector Pension Investment Board (PSP Investments).

Based in New York, he leads PSP Investments' credit investing activities in the United States and Canada, primarily focused on private equity backed transactions across public and private markets. PSP Investments currently manages a portfolio of over $14.5 billion of non-investment grade credit assets.

Ian has over 20 years of leveraged finance experience. Prior to joining PSP Investments in 2016, he was a Managing Director at Barclays Capital, focused on high yield and leveraged loan capital markets. Before joining Barclays Capital, he worked at CIBC World Markets in leveraged finance.

Ian holds a B.A. in Management from Gettysburg College.

**Robert Galeano**

**Head of Investor Relations**

Standard General

**Panelist – Breakout Panel: Credit: Manager Investment Insights**

Mr. Galeano joined Standard General in 2019 as Head 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.

---

**Bryn Gostin**

**Managing Director**

Capital Dynamics

**Panelist – Breakout Panel: Credit: Manager Investment Insights**

Bryn is a Managing Director on the Business Development team, where he is the Head of Product Development & Strategy and Chair of Responsible Investment Committee. He is also a member of the Executive Committee. Prior to joining Capital Dynamics, Bryn worked at Goldman Sachs in the Investment Management Division where he served as the Head of Business Development for GP stake, secondary, and senior lending strategies. Earlier in his career, Bryn practiced corporate law at Skadden Arps and Jones Day. He holds a Bachelor's degree, summa cum laude, from Duke University, a Masters degree from Oxford University and a Juris Doctorate, magna cum laude, from Georgetown University. Bryn also served as a member of the New York Lawyers for the Public Interest.

## Robert O'Leary

**Global Co-Portfolio Manager & Head of North America**

Oaktree Capital Management

**Panelist – Breakout Panel: Credit: Manager Investment Insights**

Mr. O'Leary, Global Co-Portfolio Manager and Head of North America for Oaktree's Global Opportunities strategy, leads all of the group's investment activities in the region. He contributes to the analysis, portfolio construction and management of the Global Opportunities, Value Opportunities and Strategic Credit strategies. Prior to joining the firm in 2002, Mr. O'Leary served as an associate at McKinsey & Company, where he worked primarily in the Corporate Finance and Strategy practice. Before attending Harvard Business School, Mr. O'Leary worked for two years at Orion Partners, a private equity firm, where he focused on investments in private companies. Prior thereto, he worked at McKinsey & Company as a business analyst. Mr. O'Leary graduated with a B.A. degree in economics magna cum laude from Pomona College and an M.B.A. in business administration from Harvard Business School.

## Sengal Selassie*

**Chief Executive Officer & Founder**

Brightwood Capital Advisors

**Panelist – Breakout Panel: Credit: Manager Investment Insights**

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

**Karen Eifler**

**Vice President, Head of Marketable Securities**

Children's Hospital of Philadelphia

**Moderator – Breakout Panel: The Hedge Fund Investment Landscape**

Karen Eifler, Vice President, joined the Children's Hospital of Philadelphia's Investment Office in 2019. She is responsible for managing the public equity, fixed income, and hedge fund investments for the hospital's foundation. Prior to joining CHOP, Karen served as Director at the Office of Investments of the University of Pennsylvania, specializing in absolute return strategies. Karen began her career at JP Morgan where she held several roles across corporate and structured credit, both as a trader and risk manager. Karen graduated from the Jerome Fisher Program in Management and Technology at the University of Pennsylvania where she earned both a BS from the Wharton School and a BAS from the School of Engineering and Applied Science. She is a CFA Charterholder.

**William Heard**

**Chief Executive Officer & Chief Investment Officer**

Heard Capital

**Panelist – Breakout Panel: The Hedge Fund Investment Landscape**

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 the telecommunications, media, technology, financials, and energy sectors. Mr. Heard's investment experience spans asset classes and includes 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.

## Kevin Reevey

**Senior Research Analyst**

Elizabeth Park
Capital Management

**Panelist – Breakout Panel: The Hedge Fund Investment Landscape**

Kevin is a nationally-recognized, Senior Equity Research Analyst with close to 30 years' experience identifying sound investment opportunities, partners and clients trust. Kevin brings over two decades experience as a sell-side and buy-side analyst dedicated to the banking industry covering large, mid, small, and micro-cap commercial banks. He demonstrates sophisticated intellectual curiosity when researching publicly-traded banks with robust business acumen across financial analysis, modeling, and projected performance outcomes across the banking and financial services industry. His steadfast commitment to industry best-practices and disciplined business ethics has established Kevin as an industry bellwether and trusted advisor.

Prior to joining Elizabeth Park, Kevin Reevey was a Managing Director at D.A. Davidson, where he successfully led and built the firm's Midwest depository institutions equity research franchise, covering more than two-dozen companies. Before this, he was a Managing Director of FSI Group, LLC, an investment firm operating a multi-strategy investment platform focused in the financial services sector. In 2007, Mr. Reevey was recognized by The Wall Street Journal's "Best on Street Poll" as one of top five thrift equity analysts on the street based on his stock recommendations performance. Throughout his career, he has been quoted in numerous periodicals such as The American Banker, SNL Financial, Bank Director, Business Week, Crain's Business, and The Wall Street Journal. In addition, Mr. Reevey is a frequent speaker at conferences and symposiums on issues related to the U.S. banking sector. In 2013 and 2011, he spoke at Oracle Corporation's annual Open World Conference on the trends and outlook for the U.S. banking industry.

Kevin earned his BS in Business Administration from the New York University's Stern School of Business and his MBA from Harvard Business School. Mr. Reevey is emeritus of the Alumni Board of the Harvard Business School where he served from 2017-2020. He has served as Board President of the Clifton Cultural Arts Center and trustee of the Cincinnati Ballet, including the Executive Board and Chairman of the Finance Committee. He also notably served on the boards of Cincinnati State Technical and Community College Foundation and ArtsWave. Mr. Reevey was Alumni Section Fund Chairman of his class at the Harvard Business School. In 2014 he received the Civic Leadership Award from Venue Magazine. As an avid community member, Kevin calls New York home.

## Gregory Rudin

**Principal**

The Baupost Group

**Panelist – Breakout Panel: The Hedge Fund Investment Landscape**

Greg is a Principal in the Public Investment Group at The Baupost Group, L.L.C. He is a generalist with extensive experience in public equities and distressed debt investments. Prior to joining Baupost, Greg worked in New York, first as an Analyst covering the power and utilities sector for UBS Investment Bank, and then as an Associate at Valinor Management, L.P., a fundamentals-driven long-short equity fund in New York. Greg graduated Phi Beta Kappa and magna cum laude from Emory University.

**Fernando Vigil***

**Founder &
Chief Investment Officer**

Teca Partners

**Panelist – Breakout Panel: The Hedge Fund Investment Landscape**

Fernando has 19 years of experience across both public and private equity investing. Most recently, he was with Brookside Capital (aka Bain Capital Public Equities), which he joined in 2008. He served as a Managing Director from 2014 to 2016 and as a Director from 2010 to 2013. He was co-head of the consumer sector reporting directly to the fund's Portfolio Manager. In that role he managed a portfolio of global long and short positions with responsibility for the sector investment process, including idea generation, due diligence, position sizing, portfolio and risk management within the sector, in partnership with the fund's leadership. He worked on investments in all major geographies, with a focus on the US, Europe and Latin America. He was also actively involved in the fund's private investing activity.

Fernando began his investment career with Bain Capital in 2001. From 2001 to 2008 he worked as an Analyst, Associate and Principal with Bain Capital Ventures, the venture and growth capital affiliate of Bain Capital During his time there he was involved in a number of growth and venture stage investments in software, information services and healthcare services .

He holds a BA in Economics (with distinction) from Yale University and an MBA from Harvard Business School, where he was a Baker Scholar and Siebel Scholar.

**Lindsay Creedon**

**Partner**

StepStone Group

**Moderator – Breakout Panel: Private Equity: Macro Environment and Return to Fundamentals**

Ms. Creedon is a member of the private equity team, co-leading the firm's private equity co-investment practice. She is the Head of Diversity & Inclusion and is involved in the Firm's various management activities.  Prior to joining StepStone in 2010, Ms. Creedon was a vice president at Citi Private Equity, a US $10 billion equity co-investment, mezzanine, and fund of private equity funds business. Before that, she was a director in the corporate strategy & business development group at The Walt Disney Company, and was a director of business development at NBC Universal.  Ms. Creedon graduated cum laude with a BA from Georgetown University.

**Joseph Haslip**

**Managing Director**

Valor Equity Partners

**Panelist – Breakout Panel: Private Equity: Macro Environment and Return to Fundamentals**

Joe joined Valor in 2020, and serves as a Managing Director in Investor Relations.

Prior to joining Valor, Joe spent over 20 years in the investment management industry, working at both LP and GP platforms in the private equity and hedge fund industries. On the GP side, he held senior positions at The Blue Harbour Group, an activist hedge fund and a family office investment platform focused on private equity co-investments. Joe also worked for the New York City Public Pension System, where he assisted in the buildout of its alternative investment platform in private equity and real estate. As part of that effort, he led the pension system's efforts to build out a $7 billion emerging and diverse manager portfolio across asset classes.

Joe currently serves as Chairman of the Board of The National Association of Investment Companies (NAIC), which represents diverse investment managers in the private equity and hedge fund industries.

**Nik Shah**

**Managing Partner & Co-Founder**

Cohere Capital

**Panelist – Breakout Panel: Private Equity: Macro Environment and Return to Fundamentals**

Nik is Managing Partner and Co-Founder of Cohere Capital, a Boston-based technology focused private equity firm. Previously, Nik was a Managing Director at H.I.G. Capital / H.I.G. Growth Partners where he focused on investments in high-growth, entrepreneur-owned companies in the technology, media, and Internet sectors. Prior to joining H.I.G., Nik was with Landmark Growth Capital Partners in Boston, At Landmark, he was responsible for deal sourcing, due diligence, and assisting management as a board director and observer of several portfolio companies. Earlier in his career, Nik was at AH Ventures and Adams, Harkness & Hill in Boston. Nik received his Bachelor of Arts degree in biochemistry with honors from Harvard University and an M.B.A. from the Tuck School of Business at Dartmouth.

## Suni Sreepada

**Partner**

Ropes & Gray

**Panelist – Breakout Panel: Private Equity: Macro Environment and Return to Fundamentals**

Suni Sreepada is a partner in the mergers & acquisitions group who guides public and private companies, as well as private equity firms, in global transactions. With a particular focus on transactions involving public companies, Suni advises on a broad array of deals, including mergers, acquisitions, joint ventures, divestitures and strategic investments. She also counsels clients on SEC disclosure and stock exchange compliance considerations. More recently, she has advised on a series of deSPAC transactions.

Known for skillfully managing deals that range in size from the middle market to $10 billion-plus, Suni has recently been named a “Top Rising Star” by The Deal. She advises clients in a wide range of industries, including energy and infrastructure; life sciences; retail and consumer brands; and technology, media and telecommunications.

Prior to joining Ropes & Gray, Suni was a partner in the New York office of another international law firm.

## Afaf Ibraheem Warren*

**Principal**

Siris Capital Group

**Panelist – Breakout Panel: Private Equity: Macro Environment and Return to Fundamentals**

Ms. Afaf Ibraheem Warren (Principal) joined Siris in 2017. Prior to joining Siris, Ms. Ibraheem Warren worked at Vance Street Capital and the Industrials Investment Banking Group at Morgan Stanley. Ms. Ibraheem received her M.B.A. with Distinction from Harvard Business School and holds an A.B. in Psychology from Harvard University.

**Vardan Gattani**

**Vice President**

645 Ventures

**Moderator – Breakout Panel: Venture Capital: The Evolution of Stage-Specific Venture Investing**

Vardan Gattani is a Vice President on 645 Venture's Investment & Research team. He partners with new and existing portfolio founders across fintech, e-commerce and enterprise software.

Before joining 645, Vardan was an investor at Riot Ventures and AlleyCorp. Previously, he also led go-to-market teams at Foursquare and Estimote. He enjoys partnering with founders who are immersed in their businesses and who have strong beliefs on the future of their markets. As an ex-operator, he loves going deep on both product and go-to-market strategies.

A native New Yorker with a strong bias over San Francisco, he firmly stands behind Rezdora's Michelin Star, Inter Milan, and his frequent trips upstate.

Vardan graduated with a B.A. from Wesleyan University and earned an MBA from Columbia Business School.

**Matt Brennan**

**General Partner**

TCV

**Panelist – Breakout Panel: Venture Capital: The Evolution of Stage-Specific Venture Investing**

Matt focuses on investments in expansion-stage software, financial technology, and tech-enabled services companies. He is particularly interested in companies that have a rich stream of data and information, whether they are originating it, managing it, or transacting with it. Matt's investments include BenchSci, where he serves on the board of directors, and Legit Security. Matt was previously a Partner at General Catalyst, where he focused on SaaS, data services, payments, and healthcare companies. Prior to General Catalyst, Matt was a Principal at Bain Capital Ventures, where he specialized in the intersection of software and financial technology. He began his investing career at Insight Venture Partners.

Matt became interested in entrepreneurship early on in life, when most of the jobs he held were primarily running businesses he had started himself, ranging from power washing to tutoring. Ever since, he has had a deep admiration for entrepreneurs and enjoys collaborating with them in a way that goes well beyond funding. On the personal side, Matt loves adventure and spending time with his wife exploring other cultures around the world. He enjoys skiing, tennis, running, and cooking.

Matt received his B.S. degree in Economics with a Concentration in Finance from The Wharton School at The University of Pennsylvania, Magna Cum Laude.

**John Kim**

**Managing Director**

General Catalyst

**Panelist – Breakout Panel: Venture Capital: The Evolution of Stage-Specific Venture Investing**

My first job after college as an IBM marketing rep taught me two important things about myself. Through that initial work, I first discovered and explored my love for sales and marketing. The Art of Persuasion became a passion I would cultivate over the arc of my career. Second, I learned that success is achieved only when the customer believes that their needs are understood and met with care. As my mentor used to say, "Take good care of your relationships or someone else will." After getting my MBA at Harvard, I went into private equity where I could integrate these capabilities into the core mission of the investment firms that I worked for. At the time, the investor relations role was still quite new and no one had written the playbook on how it should be done. For me, it meant dissolving the isolation that had long existed between investment professionals and their investors. Bridging those two worlds became a calling for me. Over the course of my career, that calling helped me to create authentic and meaningful connections with a broad range of investors while working for world-class investment firms such as JP Morgan, Court Square Capital, and most recently at Kelso & Co. What I love about General Catalyst is our focus on seeing how big a difference the firm can make for others whether they are limited partners, portfolio companies, or individuals in the firm's amazing network of entrepreneurs. Outside of the office, I support organizations devoted to education for underprivileged kids in Brooklyn (my home) and internationally. I also like to get out on the water with boats or a paddle board, and I hold a purple belt in Jiu Jitsu. If you catch me at a party, be prepared to sing: my guitar knows the chords for hundreds of songs.

**Rebecca Liu-Doyle**

**Managing Director**

Insight Partners

**Panelist – Breakout Panel: Venture Capital: The Evolution of Stage-Specific Venture Investing**

Rebecca joined Insight in 2016. Her focus areas include high-growth software, marketplaces, and consumer internet.

Previously, she spent time on Insight's Onsite team, where she worked closely with portfolio executives on growth strategy. Rebecca started her career as a management consultant in McKinsey & Company's New York office, advising clients in the technology, financial services, and consumer goods industries. Her work at McKinsey spanned a number of topics, including M&A, product development, and frontline transformation.

Rebecca graduated summa cum laude from Yale University with a BA in Ethics, Politics, and Economics. She mentors at 1776, is a member of the Acumen Junior Council, and helped launch the Parity Professional Program. She grew up bouncing between states and has lived in Louisiana, Missouri, Wisconsin, and Utah. In her spare time, Rebecca enjoys eating and shopping her way through the city, cycling, Marvel superhero movies, and art history. She is fluent in Chinese, and has a black belt in Tae-Kwon-Do.

**Dr. Kola Olofinboba**

**Managing Partner**

Fairview Capital Partners

**Panelist – Breakout Panel: Venture Capital: The Evolution of Stage-Specific Venture Investing**

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, 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.

**Allen Ruiz**

**Managing Director, Private Assets**

Barings

**Moderator – Breakout Panel: Continuation Funds & Other GP-Led Secondaries**

Allen Ruiz is a member of Barings' Funds & Co-Investments team and serves on the Investment Committee and as vertical lead for its Private Equity investment activities. Allen is responsible for originating and underwriting funds, direct/co-investments, and single-asset secondary transactions. Allen has experience investing in and managing private equity assets as a direct investor and as a Limited Partner. Prior to joining the firm in 2017, Allen was a Director and founding team member at Aldea Capital Partners, where he focused on sourcing and underwriting direct/co-investment opportunities. Prior to Aldea, he was a VP at Meruelo Investment Partners, executing direct private equity and public market investments. Prior to Meruelo, Allen was an Investment Associate at Credit Suisse (Alternative Investments). Allen holds a B.S. in Business Administration from the University of California at Riverside and an M.B.A from Harvard Business School. He is an alumnus of SEO and the Robert Toigo Foundation.

## Joseph Goldrick

**Partner**

Adams Street Partners

**Panelist – Breakout Panel: Continuation Funds & Other GP-Led Secondaries**

Joe is responsible for all aspects of the secondary business, including strategy, investments, fundraising, and portfolio construction. He is focused on North American opportunities while also covering Adams Street's secondary efforts in Latin American funds.

Prior to joining the firm, Joe was an investment banking analyst with Robert W. Baird & Co. where he worked on a variety of corporate advisory assignments for middle-market companies in the business services and technology sectors. His work experience also includes positions with the City of Chicago Office of Budget and Management and Nuveen Investments, LLC.

Joe monitors several funds within Adams Street's portfolio and is responsible for the management of Adams Street's secondary lender relationships.

He is also a member of Adams Street's Secondary Investment Committee and Portfolio Construction Committee.

---

## Daryl Li

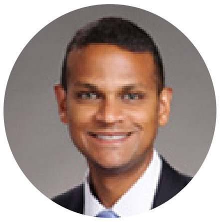
**Senior Managing Director**

Ardian

**Panelist – Breakout Panel: Continuation Funds & Other GP-Led Secondaries**

Daryl joined Ardian in 2010 and is based in New York. He is a senior managing director and an investment committee member for Ardian's secondary, primary and co-investment funds and customized solution platforms. In his role, Daryl is principally responsible for leading the sourcing initiative and due diligence process for potential investments and the management of existing portfolio assets. Prior to joining Ardian, Daryl worked in investment banking.

Ardian is a world-leading private investment house with assets of US $125bn managed or advised in Europe, North America and Asia. The company is majority-owned by its employees, working from fifteen offices across Europe (Frankfurt, Jersey, London, Luxembourg, Madrid, Milan, Paris and Zurich), the Americas (New York, San Francisco and Santiago) and Asia (Beijing, Seoul, Singapore and Tokyo).



**Rajesh Senapati**

**Managing Director**

HarbourVest Partners

**Panelist – Breakout Panel: Continuation Funds & Other GP-Led Secondaries**

Rajesh Senapati joined HarbourVest in 2005 as an associate focused on secondary investments. Raj focuses on global secondary private equity investments purchased through both traditional and more complex transactions. He has played a lead role in HarbourVest's public market transactions including the 2011 acquisition of Absolute Private Equity, a Swiss SIX listed investment company, as well as the 2012 acquisition of the investment portfolio of Conversus Capital, a Euronext listed investment company.

In addition to his time at HarbourVest, Raj's prior experience includes working for Castanea Partners, a consumer focused private equity firm, as well as J.P. Morgan, as an investment banking analyst in the diversified industrials group.

Raj received a BA in Economics from the University of Chicago in 2003 and an MBA from the Kellogg School of Management at Northwestern University in 2010.

**John Wang**

**Counsel**

Ropes & Gray

**Panelist – Breakout Panel: Continuation Funds & Other GP-Led Secondaries**

GangQiao (John) Wang joined Ropes & Gray in 2010 and is counsel practicing in the corporate department. He is a member of the asset management group. John has extensive asset management experience in advising U.S. and global alternative asset managers in a wide range of matters related to fund formation and capital raising, governance, compliance and internal operations. John's experience includes advising clients on the formation and operation of private equity funds, healthcare funds, credit funds, venture capital funds, infrastructure funds, funds of funds and separate accounts. John also represents U.S. and international institutional investors (including endowments, pension funds, sovereign wealth funds, funds of funds, private foundations, and family offices) in investing in U.S., European, Asian and Latin American leverage buyout, venture capital, real estate, energy, mezzanine and hedge fund investments, in primary, secondary and coinvestment transactions.

Prior to joining Ropes & Gray, John worked as an intern at the United Nations Development Programme (UNDP) in New York City and the World Trade Organization (WTO) in Geneva, Switzerland. Prior to studying at Harvard Law School, John worked in a law firm in Shanghai and taught Chinese law as a full time faculty member at Fudan University Law School in Shanghai. He has passed the National Bar Examination of P.R. China.

## Mikiyon Alexander

**Senior Director**

Fitch Ratings

**Moderator – Breakout Panel: Impact Investing in Uncertain Times**

Mikiyon Alexander is a Senior Director and Sector Head in Fitch Ratings' public finance department. He covers the tax-exempt housing sector, focusing on the primary market for cross sector municipal finance securitizations and affordable housing. Mikiyon is also responsible for criteria development and providing credit analysis for new and existing municipal housing finance transactions.

Prior to joining Fitch in 2017, Mikiyon spent 12 years at S&P Global Ratings where he was Senior Director and Analytical Manager in U.S. Public Finance, managing a team of credit professionals who provided ratings and credit analysis in the municipal structured and housing enterprises groups.

Mikiyon earned a Bachelor of Arts in Public Administration from Kentucky State University and a M.S. of Public and Urban Policy from The New School Milano Graduate School of International Affairs, Management and Urban Policy. Mikiyon is a member of the Municipal Analyst Group of New York, the National Association of Housing and Redevelopment Officials, and the National Council of State Housing Agencies. In 2011 Mikiyon was featured in The Network Journal as one of the 40 Under-Forty Achievers. In 2013 he was inducted into the Council of Urban Professionals' Executive Leadership Program. In 2019 Mikiyon was named a "Rising Star" by the Bond Buyer.

## Kunle Apampa

**Director and**
**Head of Client Advisory**
**& Partnerships**

Capricorn Investment Group

**Panelist – Breakout Panel: Impact Investing in Uncertain Times**

Kunle Apampa is the Director and Head of Client Advisory & Partnerships at Capricorn Investment Group. He joined the firm in 2021. Prior to Capricorn, Kunle was at GS Imprint, an ESG & Impact Investment platform within the Asset Management Division. Kunle spent over a decade at Goldman Sachs, holding several leadership roles within the firm's Global Markets division as well as the Finance division. Kunle holds a BSc in Chemical Engineering, specializing in Energy, Environment & Economics, from the Illinois Institute of Technology in Chicago. Kunle is based in New York City.

**Mark Longstreth**

**Partner**

Newlight Partners

**Panelist – Breakout Panel: Impact Investing in Uncertain Times**

Mark has been with Newlight Partners and its predecessor, the Strategic Investments Group of Soros Fund Management, since 2007. He has over 15 years of experience in the private equity and investment banking industries. Mark leads Newlight's investment activity in the theme Transition to Distributed and Sustainable Energy.

Mark resides in New York City.

Former Experience
Soros Fund Management – Managing Director
Bear Stearns – Investment Banking, Analyst
Royal Bank of Scotland – Analyst

Education
Georgetown University – B.S.F.S. (Bachelor in Science and Foreign Service) in International Economics; John Carroll Scholar

**Katie Moore Sobuto**

**Managing Director**

Hamilton Lane

**Panelist – Breakout Panel: Impact Investing in Uncertain Times**

Katie is a Managing Director on the Fund Investment Team and focused on leading the firm's Emerging & Diverse Investment Programs. Prior to her role, Katie was a Senior Relationship Manager to several of the firm's institutional clients responsible for portfolio construction and strategic planning. Katie is currently a member of the firm's Responsible Investment Committee and co-chairs the firm's Diversity, Equity & Inclusion Council.

Prior to joining the firm in 2007, she was a Financial Analyst at Murray Devine & Company, a Philadelphia-based Valuation Advisor to private equity and venture capital firms.

In 2021, Katie was recognized with the Think Advisors Luminaries award in the Diversity & Inclusion category. Katie has also previously been named to the Chief Investment Officer Magazine's 2020 Knowledge Brokers list acknowledging the world's most influential investment consultants and named to Real Deals' 2020 "Future 40 Diversity and Inclusion Leaders" list. In addition to her work at Hamilton Lane, Katie is a member of the Private Equity Women's Investor Network (PEWIN), 100 Women in Finance and The Forum of Executive Women.

Katie received a B.S. in Finance from Drexel University.

## Derrick Weatherspoon

**Director &**
**Senior Portfolio Manager**

BlackRock

**Panelist – Breakout Panel: Impact Investing in Uncertain Times**

Derrick Weatherspoon is a Senior Portfolio Manager for BlackRock's Impact Opportunities (BIO) Fund. He joined BlackRock in 2021. Prior to joining BlackRock, Derrick served as a Partner and Managing Director at IMB Partners, a middle-market private equity firm focused on investments in the utility services and government agency services sectors. At IMB, he led the firm's deal management function in which he was responsible for sourcing, financing and executing investment opportunities as well as monitoring portfolio companies. Prior to IMB, Derrick was a Vice President at The Carlyle Group within in its U.S. Buyout Fund. At Carlyle, Derrick sourced, executed and monitored large-scale leveraged buyout and growth equity investments in the consumer, media and retail sectors. Prior to Carlyle, Derrick worked at Welsh, Carson, Anderson & Stowe, a private equity firm focused on investing in growth-oriented companies in the healthcare and technology sectors. Derrick began his career at Lehman Brothers, where he was an Investment Banking Analyst. Derrick received a B.S. in Finance from the University of Maryland's Robert H. Smith School of Business and an MBA from Harvard Business School, where he was a Robert Toigo Fellow.

## Bora Lim

**Director**

Bank of America

**Moderator – Breakout Panel: GP Stakes**

Bora Lim is a Director in the Hedge Fund Origination & Product Management team within the Alternative Investments Group at Bank of America. The Alternative Investments group is responsible for providing wealth management clients with access to a range of investment solutions including hedge funds, private equity, and real assets. Bora leads the sourcing efforts for equity hedge funds and is also responsible for structuring, negotiating, and managing hedge fund solutions.

Bora currently serves as Chief Administrative Officer for the Diversity & Inclusion group at Bank of America. Prior to joining Bank of America in 2013, Bora was a Senior Associate at KPMG. Bora holds a Bachelor of Science in Business Administration from SUNY Geneseo and is a CAIA Charterholder.

**Stephen Cammock***

**Executive Director**

GCM Grosvenor

**Panelist – Breakout Panel: GP Stakes**

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, secondary investment opportunities, and seeding opportunities, and is involved with deal sourcing and client relationship management. He 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.

**Gustavo Cardenas***

**Managing Director**

Wafra

**Panelist – Breakout Panel: GP Stakes**

Gustavo Cardenas is a Managing Director at Wafra, responsible for investments in closed end funds, strategic investments in financial services firms and other private investments.

Previously, Mr. Cardenas was a Vice President at Hamilton Lane, focused on co-investments and fund investments. He began his career in investment banking at Bank of America Securities and then at Mesoamerica Partners, a Central American financial group.

Mr. Cardenas earned a BA from Harvard College and an MBA from the Wharton School of Business.

**Mustafa Siddiqui**

**Senior Managing Director**

Blackstone

**Panelist – Breakout Panel: GP Stakes**

Mustafa M. Siddiqui is the Head of Blackstone's GP Stakes business, focusing on the acquisition of minority ownership interests in private equity and other private-market alternative asset management firms. Mr. Siddiqui was previously a Senior Managing Director in the Private Equity Group, where he was involved in the execution of several Blackstone investments, including those made through Royal Resources and Siccar Point.

Before joining Blackstone in 2009, Mr. Siddiqui held roles at Springbok Capital, General Atlantic, and McKinsey & Company. Mr. Siddiqui received an A.B. in Economics from Harvard College, where he graduated magna cum laude, an A.M. in Regional Studies from Harvard University, and an M.B.A. with High Distinction from Harvard Business School, where he graduated as a Baker Scholar. He is a member of the Council on Foreign Relations.

**Rishi Chhabria**

**Partner**

Campbell Lutyens

**Moderator – Breakout Panel: Navigating Today's Robust Fundraising Environment**

Rishi joined Campbell Lutyens in 2011 and is Head of Sales in North America. He is also responsible for institutional relationships in the Midwest and is a member of the Management Committee. Prior to joining the placement team in the US, Rishi was part of the Campbell Lutyens secondary advisory team in London.

Previously, Rishi worked at Blackstone Advisory Partners for six years in New York and London, including working closely with the firm's senior management on Blackstone Group's Initial Public Offering in 2007. Rishi holds an MBA from London Business School, where he was a Student Award winner, and a degree in Finance from New York University.

## Greg Jania

**Global Co-Head of Private Equity**

APG Asset Management

**Panelist – Breakout Panel: Navigating Today's Robust Fundraising Environment**

Greg is the Global Co-Head of Private Equity at APG, a Dutch asset manager, with ~€650 billion of AUM and approximately €50 billion in PE AUM. APG makes PE commitments of €8-10 billion per year globally. Fund investments range from €100 million to €1 billion and co-investments from €50 million to €250 million. APG holds LPAC seats on more than 90 PE funds. Prior to joining APG, Greg was a Partner at WP Global Partners and previously held positions in private equity at GE Capital and First Chicago Capital Corporation. Mr. Jania received an M.B.A. with honors from the University of Chicago and earned a B.A. in political science and economics, magna cum laude, from Wabash College where he graduated Phi Beta Kappa.

## Prital Kadakia

**Partner**

Serent Capital

**Panelist – Breakout Panel: Navigating Today's Robust Fundraising Environment**

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 the 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 an Engagement 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 an 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.

## David Perez

**Co-Founder & Managing Partner**

Avance Investment Management

**Panelist – Breakout Panel: Navigating Today's Robust Fundraising Environment**

David Perez is a Co-founder and a Managing Partner of Avance Investment Management, LLC. Prior to founding Avance, Mr. Perez was the President and COO of Palladium Equity Partners. Prior to Palladium, Mr. Perez had several senior private equity roles, including Principal of General Atlantic Partners and Atlas Venture and Senior Associate of Chase Capital Partners. Mr. Perez started his career with James D. Wolfensohn and Co, focused on mergers and acquisitions.

Mr. Perez earned his B.S. in Systems Engineering from Dresden University of Technology, a M. Eng. in Engineering Management from Cornell University, and an MBA from Harvard Business School. Mr. Perez is a member of the Council on Foreign Relations, a Co-Chair of the Harvard University Cuba Studies Advisory Group, a member of the Cornell Engineering School Advisory Group, President of the Board of Trustees of Trinity School in New York City, and a longstanding board member and former President of the Board of Ballet Hispánico. He also served as Chairman of the Board of the NAIC. Mr. Perez lives in New York with his wife and three children.

## Chirag H. Shah*

**Senior Portfolio Manager**

Alaska Permanent Fund Corporation

**Panelist – Breakout Panel: Navigating Today's Robust Fundraising Environment**

Chirag has over 16 years PE industry experience globally. He is a Senior Portfolio Manager at the Alaska Permanent Fund Corporation, a $80B+ sovereign endowment with a ~$16B Private Equity and Special Opportunities portfolio. Prior to joining APFC, Chirag was in PE roles leading co-investments and fund investments at two established institutional investment organizations, DB Private Equity and GE Asset Management. He started his career in investment banking at Citi / Salomon Smith Barney in New York and Singapore. Chirag is also actively engaged in the broader PE community, serving as an advisory board member of the Hicks, Muse, Tate & Furst Center for Private Equity Finance at The University of Texas at Austin and a member of SEO's Alternative Investments Limited Partner Advisory Council. He holds a BBA and MBA from The University of Texas at Austin.

Fireside Chat

**Henry R. Kravis****

**Co-Founder & Co-Executive Chairman**

KKR

Henry Kravis (New York) co-founded KKR in 1976 and serves as its Co-Executive Chairman. Prior to his current position, he was Co-Chief Executive Officer until 2021. 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 Axel Springer and ICONIQ Capital, LLC. He also serves as a director, chairman emeritus, or trustee of several other cultural, professional, and educational institutions, including The Business Council (former chairman), 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 the 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.

---

Fireside Chat

**General Stan McChrystal (US Army, Ret.)**

**Founder & Chief Executive Officer**

McChrystal Group

A transformational leader with a remarkable record of achievement, General Stanley A. McChrystal was called “one of America’s greatest warriors” by Secretary of Defense Robert Gates. He is widely praised for launching a revolution in warfare by leading a comprehensive counterterrorism organization that fused intelligence and operations, redefining the way military and government agencies interact. The son and grandson of Army officers, McChrystal graduated from West Point in 1976 as an infantry officer, completed Ranger Training and later, Special Forces Training. Over the course of his career, he held leadership and staff positions in the Army Special Forces, Army Rangers, 82nd Airborne Division, the XVIII Army Airborne Corp, and the Joint Staff. He is a graduate of the US Naval War College, and he completed fellowships at Harvard’s John F. Kennedy School of Government in 1997 and at the Council on Foreign Relations in 2000. From 2003 to 2008, McChrystal commanded JSOC - responsible for leading the nation's deployed military counterterrorism efforts around the globe. His leadership of JSOC is credited with the 2003 capture of Saddam Hussein and the 2006 location and killing of Abu Musab al-Zarqawi, the leader of al-Qaeda in Iraq. In June 2009, McChrystal received his fourth star and assumed command of all international forces in Afghanistan. Since retiring from the military, McChrystal has served on several corporate boards of directors, that include Deutsche Bank America, JetBlue Airways, Navistar, Siemens Government Technologies, Fiscal Note, and Accent Technologies. A passionate advocate for national service, McChrystal is the Chair of the Board of Service Year Alliance, which envisions a future in which a service year is a cultural expectation and common opportunity for every young American. He is a senior fellow at Yale University's Jackson Institute for Global Affairs, where he teaches a course on leadership. Additionally, he is the author of the bestselling leadership books, My Share of the Task: A Memoir, Team of Teams: New Rules of Engagement for a Complex World, Leaders: Myth and Reality, and Risk: A User’s Guide. General McChrystal founded the McChrystal Group in January 2011. Recognizing that companies today are experiencing parallels to what he faced in the war theater, McChrystal established this advisory services firm to help businesses challenge the hierarchical, “command and control” approach to organizational management.

**Loida N. Lewis**

**Chair**

Reginald F. Lewis Foundation

### Presenter – Lunch & Reginald F. Lewis Award

Mrs. Lewis is Chair and CEO of TLC Beatrice, LLC, a family investment firm. A lawyer by profession, admitted to practice in the Philippines and New York, Mrs. Lewis was the first Filipino woman to pass the New York bar without attending law school in the United States.

Mrs. Lewis is also the Chair of the Reginald F. Lewis Foundation, which is a benefactor of Harvard Law School, Museum of Maryland African American History & Culture, Virginia State University and the Lewis College in Sorsogon her home town in the Philippines. A building has been name at those institutions in Mr. Lewis' honor. The foundation is also a major donor to the National Museum of African American History and Culture in Washington, D.C.

Mrs. Lewis is member of the Board of Directors of Children's Orchestra Society, US Philippines Society and the Apollo Theatre Foundation. She is co-founder of several advocacy organizations: Asian American Legal Defense & Education Fund, National Federation of Filipino-American Associations, US Pinoys for Good Governance and Global Filipino Diaspora Council.

Mrs. Lewis lives in New York. She has two daughters and four grandchildren.

---

Fireside Chat

**Orlando Bravo****

**Co-Founder & Managing Partner**

Thoma Bravo

### Recipient – Lunch & Reginald F. Lewis Award

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 350 software acquisitions conducted by the firm, representing more than $155 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. 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 interests also include causes in healthcare. He endowed faculty scholar and fellow positions at Stanford University's Sean N. Parker Center for Allergy Research and supports a wide range of medical research. He is a member of the Board of Trustees at Memorial Sloan Kettering Cancer Center. Orlando is a Member of the Board of Trustees of the Corporation of Brown University.

Fireside Chat

**Anastasia Titarchuk**

**Chief Investment Officer**

New York State Common Retirement Fund

**Moderator – Lunch & Reginald F. Lewis Award**

Anastasia Titarchuk is the Chief Investment Officer for New York State's Common Retirement Fund. As of March 31, 2021, the value of the Fund was $254.8 billion. Under the direction of State Comptroller Thomas P. DiNapoli, Titarchuk is responsible for developing and implementing investment strategies to ensure that the Fund remains one of the best-funded and best-managed public pension plans in the country. The Fund holds assets in trust for more than one million employees and retirees from state and local authorities.

Prior to Ms. Titarchuk's appointment in 2018, she was Deputy CIO since February 2015. Anastasia joined the Fund in 2011. She started her career on Wall Street in 1998. Prior to joining the Fund, she worked in a variety of leadership roles at Bank of America, Barclays Capital and Lehman Brothers, and JP Morgan. Anastasia has always had a derivatives focus. Her experience spans both liquid and structured products across a variety of markets including equities, emerging markets and rates.

Anastasia was named as a 2015 Hedge Fund Rising Star by Institutional Investor Magazine. She graduated summa cum laude from Yale University with a B.S. in Applied Mathematics.

**Jennifer Nichols**

**Vice President, HCM**

Sixth Street

**Moderator – Breakout Panel: Career: Breaking into Alternative Investments**

Jennifer Nichols joined Sixth Street in February 2022 to lead Early Career and Diversity, Equity and Inclusion strategies. Prior to joining the firm, she was an SVP of Global Diversity and Talent Management at Citi, where she focused on supporting business-led inclusion strategies, talent management, and diversity reporting. Jennifer developed a life-long passion for supporting inclusive workplaces and equitable career paths after receiving her MS in Education and BA in History from the University of Pennsylvania.

**Talar Angacian**

**Principal**

Henkel Search Partners

**Panelist – Breakout Panel: Career: Breaking into Alternative Investments**

Talar is a Principal at Henkel Search Partners.

She works across investment strategies, sectors, and levels. In addition to private equity searches, she has worked on many of HSP's credit and hedge fund mandates. Talar brings a wealth of knowledge and experience to HSP from her background in the industry. She joined HSP from Credit Suisse where she began her career and was most recently a VP in Advisory Sales covering NY-based Equity Hedge Funds and Asset Managers. Talar graduated with from Georgetown University's McDonough School of Business with a double major in Finance and International Business and minor in Studio Art.

**Katherine Brackendorff Boyd**

**Recruiter**

CPI

**Panelist – Breakout Panel: Career: Breaking into Alternative Investments**

Katherine joined CPI in 2014 and focuses on pre-MBA recruiting. Prior to joining CPI, Katherine worked as an Actuary in the Consulting Group at Towers Watson where she assisted her clients with the management and strategy of their defined benefit pension plans. While at Towers Watson, Katherine worked in both the Houston and New York offices, and also participated in the new hire training and summer internship programs. Katherine graduated from The University of Texas at Austin with a BS in Mathematics and a BA in Accounting.

## Stacy Levine

**Partner**

Amity Search Partners

**Panelist – Breakout Panel: Career: Breaking into Alternative Investments**

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. Stacy has spoken on panels at various conferences including the SEO Alternative Investments Conference and the Women's Private Equity Bootcamp. 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 alumna of Hopkins School. Stacy is originally from Woodbridge, Connecticut.

## Yoan Dipita N'Komba

**Vice Presidentr**

Warburg Pincus

**Panelist – Breakout Panel: Career: Breaking into Alternative Investments**

Yoan Dipita N'Komba is based in New York, joined Warburg Pincus in 2016 and focuses on Energy investments. Prior to joining the firm, Mr. Dipita N'Komba worked in the Financial Sponsors Group at Credit Suisse First Boston. Mr. Dipita N'Komba received an A.B. in Philosophy and Government cum laude from Harvard College. He is a Director of Monolith and Eco Material Technologies and also works with Citizen Energy and Zenith Energy..

**Angela Matheny**

**Director of Investment Staff & Diverse Manager Equity**

Crewcial Partners

### Moderator – Breakout Panel: Investing in Emerging & Diverse Managers: Insights from Active Investors

Angela Matheny joined Crewcial Partners in July 2016. She is an integral part of Crewcial's research team. Angela and the firm's CIO co-manage the investment team to ensure internal processes are efficient while overseeing the firm's systematic process for identifying best ideas for portfolios. As a Co-Relationship Manager, she ensures client portfolios and advice reflect the firm's best thinking and account for portfolio/client interests and issues. Valuing human capital, focusing on internal diverse talent acquisition, building a training and development program, and advancing diversity, equity, and inclusion industry-wide are other areas of expertise. Angela also drives the firm's research process to attract and source diverse asset managers while monitoring the internal protocol for vetting women and diverse asset managers; she facilitates the constant communication between Crewcial and fund managers, assisting firm efforts to build a robust pipeline of this largely under-followed segment of the asset manager community marketplace. Angela believes a combination of public, private, and philanthropic capital drives meaningful impact when coordinated towards a shared systemic goal. Prior to joining Crewcial, she spent 23 years at a financial-services law firm, 13 of which as a legal assistant in the investment management group assisting with fund document creation and Blue Sky and SEC filings; ten years were spent working with human resources in the training and development group with a special focus on diversity and inclusion. Angela received her BA in Psychology from Bernard Baruch College and a Master of Public Affairs and Administration from the Metropolitan College of New York. She also earned a Certificate in Human Resources Management from Villanova University, which included studies in diversity and inclusion.

**Dr. Tara Bishop**

**Founder**

Black Opal Ventures

### Panelist – Breakout Panel: Investing in Emerging & Diverse Managers: Insights from Active Investors

Dr. Tara Bishop is passionate about improving health and healthcare. In her almost twenty-year career as a physician executive, Tara has on-the-ground experience in delivery system improvement, health policy, payer operations, product development, value-based care, and start-ups. She is the founder and general partner of Black Opal Ventures, a venture capital firm that invests in companies that are transforming healthcare through technology. Tara served as the Chief Medical Officer at Bind, a health insurance start-up that is at the forefront of disrupting healthcare. She was a leader in the early development of the Bind product and grew the company 10x in revenue in 3 years. She understands start-ups from early phases of MVPs and lean operations to scaling and growth. Tara is also an associate clinical professor at Weill Cornell Medical School in New York City. Prior to joining Bind, Tara was the Medical Director and Senior Expert at McKinsey & Co. She designed new payment models for numerous clients. She was an associate professor of Medicine and Healthcare Policy at Cornell Medical School where she did cutting-edge research on health policy, innovative technologies, and health services. She directed quality improvement at Cornell and cared for patients as a primary care doctor. Dr. Bishop has published almost 50 peer-reviewed research articles which have been cited by the NY Times, WSJ, and others. Tara serves on the board of the Weill Cornell Alumni Association and the advisory boards of Marani Health, Arsenal Capital, and 25 Madison Health. She previously served on the MIT Alumni Fund Board.

## André Rice

**President**

Muller & Monroe Asset Management

**Panelist – Breakout Panel: Investing in Emerging & Diverse Managers: Insights from Active Investors**

André Rice is the President of Muller & Monroe Asset Management ($M^2$), which he founded in 1999. André is responsible for strategy, client service, business development, and serves as chairman of the investment committee. Prior to founding $M^2$, André was a serial deal investor. Earlier in his career, he was a Senior Project Manager in the Mergers and Acquisitions Department at Kraft Foods and worked in securities sales for the Private Client Group at Goldman Sachs after beginning his career as an auditor at Peat, Marwick, Mitchell & Co. (now KPMG). André is a member of the Board of Directors of CNA Financial Corporation, the Board of Directors of New America Alliance (NAA), National Association of Investment Companies (NAIC), National Association of Securities Professionals (NASP), Leadership Council of Prevent Child Abuse America (PCAA), and is a life member of Kappa Alpha Psi Fraternity, Inc.

André has a history of philanthropy, mentorship, and civic engagements. He served on several civic committees under two different Mayors (Rahm Emanuel and Richard M. Daley) and the Cook County Board President (Toni Preckwinkle), including the Chicago Cook Workforce Investment Board, Chicago Metropolitan Agency for Planning, Metropolitan Pier & Exposition Authority, and the Regional Transportation Authority.

André received a BS in accounting, with honors, from South Carolina State University and an MBA from the University of Chicago. He is a CPA.

## Bharath Srikrishnan

**Managing Partner & Founder**

BharCap Partners

**Panelist – Breakout Panel: Investing in Emerging & Diverse Managers: Insights from Active Investors**

Mr. Srikrishnan is the Founder and Managing Partner of BharCap. Prior to BharCap, Mr. Srikrishnan spent five years as a Partner on Pine Brook's financial services investment team. He was also a member of Pine Brook's Investment Committee. Mr. Srikrishnan represented Pine Brook as a board director of Fair Square Financial Holdings LLC and United PanAm Financial Corp. He represents BharCap as a board director of Clarus Capital, Sculptor Capital Management and TRIA Capital Partners. Mr. Srikrishnan formerly served as chairman of WhiteStar Asset Management, LLC and as a board director of Trinitas Capital Management, LLC and MidCap Financial LLC. Mr. Srikrishnan has 22 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.

## Eric Taylor

**Founder & Chief Executive Officer**

Trident

**Panelist – Breakout Panel: Investing in Emerging & Diverse Managers: Insights from Active Investors**

Eric Taylor is the Founder, CEO and CIO of Trident and oversees all day to day operations. He also leads the firm's Investment Committee and makes final decisions on all additions to the portfolio. Mr. Taylor began his career at Goldman Sachs, where he spent four years in the Special Situations Group, focused primarily on lower and middle market companies. After Goldman and prior to Trident, Mr. Taylor was a Portfolio Manager (credit) and Originator (equity) at Brightwood Capital, a lower-middle market asset manager that invests debt and equity primarily in companies with $5 million to $75 million of EBITDA. Mr. Taylor holds an AB from Harvard University with Honors and is a CFA Charterholder.

## Joanne Yoo

**Partner**

Development Partners International

**Moderator – Breakout Panel: Assessing Opportunity in Today's Emerging Markets**

Joanne Yoo is a Partner at Development Partners International (DPI), a leading Pan African investment firm based in London with $2.8 billion under management. In addition, Ms. Yoo is a venture investor in early stage technology companies, and in this capacity, serves as an Advisor and on a number of Investment Committees. In 2020, Ms. Yoo was appointed by the Chairman of the U.S. Securities and Exchange Commission (SEC) to the Investor Advisory Committee and currently serves on the Investor as Owner subcommittee. In 2021, Ms. Yoo was appointed as Co-President and Executive Committee member of PEWIN (Private Equity Women Investor Network), representing over $3 trillion in assets under management, where she currently co-chairs the Membership and AGM Committees. Additionally, she is a member of the Executive Leadership Council, and has been instrumentally involved in the Sponsors for Educational Opportunity Alternative Investment Program since inception..

## Lauren Cochran

**Vice President of Equity and Investment Funds**

DFC

### Panelist – Breakout Panel: Assessing Opportunity in Today's Emerging Markets

Lauren Cochran serves as DFC's Vice President of Equity and Investment Funds. In this role, Ms. Cochran provides executive leadership to DFC's equity portfolio, building DFC's strategy to commit private capital into both direct equity and fund investments in emerging market economies globally. Most recently, Ms. Cochran was Managing Director at Blue Haven Initiative, where she led strategy and execution for the family office's portfolio of direct investments as well as sitting on the investment committee for Blue Haven's multi-asset class fund portfolio. At Blue Haven, Ms. Cochran focused on investments with the dual expectation of best-in-class financial returns as well as maximum positive social and environmental impact. As part of this work, she spent much of her time in Sub-Saharan Africa, sitting on the boards of several of Blue Haven's portfolio companies, working with entrepreneurs, building the startup ecosystem while sourcing new investment opportunities. Prior to joining Blue Haven, Ms. Cochran was one of the first employees at Imprint Capital supporting the growth of the impact investment firm until it was acquired by Goldman Sachs Asset Management in 2015. At Imprint, Ms. Cochran made investments across emerging and developed markets in for-profit businesses and funds seeking to improve standards of living, create economic opportunity, and better the environment while also generating a commercial financial return. Ms. Cochran's work in emerging and frontier markets dates back to her 2006-2007 tenure with the William J. Clinton Foundation's Health Access Initiative, which she joined after three years in private equity in New York. At the Clinton Foundation, Lauren supported the buildout of healthcare infrastructure on the ground in Sub-Saharan Africa and worked to fill gaps in the diagnosis, care, and treatment of children living with HIV/AIDS. Encountering grassroots entrepreneurship in Africa inspired Ms. Cochran to pursue a career linking social impact and private equity. Ms. Cochran holds a B.S. from Georgetown University, completed the General Course program at the London School of Economics, and earned her M.B.A. from the Wharton School at the University of Pennsylvania.

## Arjuna Costa

**Managing Partner**

Flourish Ventures

### Panelist – Breakout Panel: Assessing Opportunity in Today's Emerging Markets

Arjuna Costa is driven by a deep compassion for vulnerable populations across the globe, and partners with entrepreneurs using innovative technologies to enhance their customers' financial well-being. He co-manages Flourish, with a primary focus on venture investing across emerging markets in Asia, Africa, and Latin America.
Before Flourish, Arjuna was a partner at Omidyar Network, where he built a global portfolio of early-stage, inclusive fintech companies. Prior to that, Arjuna developed a deep understanding of the potential to radically alter traditional "brick-and-mortar" economics through mobile money solutions for the Bill & Melinda Gates Foundation. Before that, he invested equity and debt in consumer finance companies in emerging markets at The Rohatyn Group, a multi-billion dollar emerging markets investment firm.

In 2003, Arjuna cofounded a $120-million private equity fund focused on the turnaround of distressed commercial banks in Africa. The fund grew out of advising governments on the restructuring and privatization of its banking sector. Arjuna began his career at Lehman Brothers, where he spent five years financing power plants and airports globally.

Arjuna earned an MBA from Harvard Business School and a BA in computer science from Columbia University.

## Sophia Tsai

**Managing Director**

Trinity Wall Street

**Panelist – Breakout Panel: Assessing Opportunity in Today's Emerging Markets**

Sophia Tsai is Managing Director of Investments at Trinity Church Wall Street, a $7 billion endowment that invests globally. Sophia has more than twenty-five years of experience in asset allocation, manager selection and direct investing across alternative and traditional asset classes. Prior to joining Trinity Church Wall Street in 2017, Sophia co-led the hedge fund program and managed private equity investments for GE Pension in the US. Before GE Pension, Sophia was based in Asia from 1995 to 2005 responsible for private equity direct investments and M&A at GE Capital.

Sophia holds an MBA from the Kellogg School of Management and the University of Science and Technology in Hong Kong. She also received a BBA in Accounting from the Chinese University of Hong Kong. Sophia is a CFA charterholder.

## Andrew Siwo

**Director of Sustainable Investments and Climate Solutions**

New York State Common Retirement Fund

**Moderator – Breakout Panel: Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022**

Andrew Siwo is the Director of Sustainable Investments and Climate Solutions at the New York State Common Retirement Fund. He is charged with providing leadership and oversight of sustainable investment efforts across the Fund's $260 billion portfolio. Previously, Siwo was an Investment Director and Head of Mission-Related Investments at Crewcial Partners, an investment consultancy to over 150 leading foundations and endowments. Prior to joining Crewcial Partners, Siwo was a manager at the Global Impact Investing Networking (GIIN). In his capacity there, he was responsible for the operation, sourcing, and development of ImpactBase, the largest platform of impact investment funds globally, which he grew by north of $10 billion and approved more than 100 prospective impact funds targeting a financial return as well as social/environmental benefits. He also educated and fostered institutional investors seeking exposure to sustainable investments.

Prior to joining the GIIN, Siwo spent five years in the investment banking division at JP Morgan—most recently in the Global Special Opportunities Group, a $3 billion proprietary portfolio of principal investments in private equity, debt, mezzanine, infrastructure, and real estate. He also held roles on the Rates Desk executing fixed income financing transactions as well as the Securitized Products Group valuing collateralized mortgage obligations. Before JP Morgan, Siwo was a member of the Corporate Finance and Real Estate Strategy Group at Victoria's Secret where he oversaw capital budgeting. He began his career at E*Trade Financial managing a team of investment representatives serving active traders and high net-worth investors. His investment articles have been printed in various industry publications. Siwo completed an MPA in Finance and Fiscal Policy at Cornell University and holds a BA in Accounting from Morehouse College. He has held FINRA Series 7, 63, and 24 licenses. He teaches an ESG course at The Wagner Graduate of Public Service at NYU where he is an Adjunct Assistant Professor of Public Service. Siwo also serves on the Board of New York Professional Advisors to Community Entrepreneurs (NYPACE).

**Ravi Anand**

**Executive Vice President, Portfolio Manager**

PIMCO

**Panelist – Breakout Panel: Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022**

Mr. Anand is an executive vice president and portfolio manager in the New York office, where he leads the team responsible for sourcing, underwriting, and structuring U.S. private real estate debt investments. Prior to joining PIMCO in 2018, he was with the CIM Group, a real estate investment manager, where he focused on the company's real estate credit business and served on the Capital Markets Committee. Previously, he worked at GE Capital Real Estate, managing relationships with opportunity funds and institutional sponsors to source and structure GE's commercial real estate debt investments. He has 19 years of investment experience and holds an MBA from Columbia Business School. He received an undergraduate degree from New York University's Leonard N. Stern School of Business.

---

**Nora Creedon**

**Managing Director**

Goldman Sachs
Asset Management

**Panelist – Breakout Panel: Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022**

Nora is an investor in private Real Estate within Goldman Sachs Asset Management, and also facilitates real estate capital raising with Alternatives Capital Markets & Strategy . She is a member of the Real Estate Investment Committee, which approves equity and credit investments globally. Previously, Nora spent more than a decade in Fundamental Equity where she served as the global head of the Real Estate Investment Trust and Infrastructure Strategies. Nora first joined Goldman Sachs as an analyst in Global Investment Research in 2000 and rejoined the firm in 2010 after working at Fidelity Investments and Fortress Investment Group.

**James Simmons**

**Chief Executive Officer & Founding Partner**

Asland Capital Partners

**Panelist – Breakout Panel: Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022**

Managing Partner and CEO Jim Simmons serves as head of Asland Capital Partners' investment committee and runs the day-to-day operations of the firm. With more than two decades of real estate investment experience, Mr. Simmons focuses on sourcing and structuring transactions through his deep relationships across the public and private sectors. Mr. Simmons was most recently a partner at Ares Management, where he ran the $485 million Ares Domestic Emerging Markets Fund, and he was previously a partner at Apollo Real Estate Advisors. Prior to his private equity fund management career, Mr. Simmons was president and CEO of the Upper Manhattan Empowerment Zone Development Corporation. He held previous roles at Bankers Trust and Salomon Smith Barney. Mr. Simmons holds a BS degree from Princeton University, an MS from Virginia Polytechnic Institute and State University and a Master of Management degree from Northwestern University's J.L. Kellogg Graduate School of Management.

**Shaunak Tanna**

**Head of Structured Investments**

Basis Investment Group

**Panelist – Breakout Panel: Investing During the Pandemic; How Successful Real Estate Investors Are Approaching the Market in 2022**

Shaunak Tanna is Head of Structured Investments at Basis Investment Group. Basis is a full service, middle market focused commercial real estate investment platform. Since its founding in 2009, Basis has closed over $5.0 billion in transactions across 47 states. Through its GSE origination platform and comingled Debt and Equity funds, Basis invests across the capital stack in stable and value-add deals and also ground up development. Mr. Tanna joined Basis in 2012 and is responsible for deal origination, structuring and asset management for Basis' debt funds. Prior to Basis, Mr. Tanna was Vice President at Terra Capital Partners. Mr. Tanna is a member of the Advisory Board of Steven L. Newman Real Estate Institute at Baruch College.

**Patricia Miller Zollar**

**Managing Director**

Neuberger Berman

**Moderator – Public Pension & Endowment Roundtable**

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. Before rejoining Neuberger Berman 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 is Chairperson Emeritus of the Board of Trustees and the recipient of an honorary Doctorate degree. Ms. Zollar is a member of the Executive Leadership Council, the Harvard Business School Alumni Board and was a former member of the executive board of the National Association of Investment Companies. She serves as Vice Chairman of The Apollo Theater and a member of the Investment Committee of the Robert Wood Johnson Foundation's Board of Trustees and the Neuberger Berman Foundation Board of Trustees.

---

**Kathryn Gernert**

**Managing Director**

Texas Permanent School Fund

**Panelist – Public Pension & Endowment Roundtable**

Managing Director for newly launched private markets Emerging Manager program of the Texas Permanent School Fund, a $45 billion endowment for K-12 public school students across the State of Texas. Ms. Gernert is also a Senior Portfolio Manager of Real Estate on the private markets team. Ms. Gernert serves on the Reporting Standards Advisory Council for ILPA and for NCREIF/PREA, as well as the respective DEI councils.

## Michael Haddad

**Interim Deputy Comptroller for Asset Management & Chief Investment Officer**

Office of NYC Comptroller

### Panelist – Public Pension & Endowment Roundtable

Michael Haddad is Interim Deputy Comptroller for Asset Management and Chief Investment Officer, leading the Bureau of Asset Management (BAM) under Comptroller Brad Lander. The Bureau of Asset Management is responsible for oversight of the investment portfolio of the five New York City Retirement Systems. With over $250 billion in aggregated 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.

Previously, Mr. Haddad served as BAM's Deputy Chief Investment Officer, overseeing all asset classes as well as Asset Allocation.

Prior to joining the NYC Comptroller's Office in 2016, Mr. Haddad worked in financial markets for three decades, including Morgan Stanley, as a US Treasury trader and Head of Canadian Fixed Income, Caxton Associates, as Senior Managing Director, and Soros Fund Management, as Senior Portfolio Manager.

Mr. Haddad served on the Treasury Borrowing Advisory Committee as well as the Treasury Market Practices Group. He received his Masters of Business Administration from the J.L. Kellogg School of Management at Northwestern University and his Bachelor of Science in Engineering Management from Southern Methodist University.

---

## Kirk Sims

**Head of Emerging Manager Program**

Teacher Retirement System of Texas

### Panelist – Public Pension & Endowment Roundtable

Kirk Sims heads TRS' Emerging Manager Program. Since being established in 2005, TRS has committed $3.7 billion to one of the largest programs of its kind. An additional $2 billion has been invested directly with EM Program graduates. Each graduate was selected as a result of consistent outperformance among a group of more than 160 EM managers. Recognizing the Program's success, in early 2019, TRS rolled out a plan to invest another $3 billion over the next three to five years.

Sims joined the Teacher Retirement System of Texas on March 1, 2019. Before joining Texas Teachers, he was a Senior Investment Officer for the Teachers' Retirement System of the State of Illinois. Sims had oversight and management responsibility of TRS's Emerging Manager Program, a $750 million evergreen pool of capital designed to identify and invest in emerging investment managers across all asset classes.

Prior, Sims worked at Prudential Retirement where he was responsible for a manager of manager's retirement platform as well as an open architecture investment platform. He also has a background in asset management and has held various positions with both large and small asset managers.

Sims is a CFA charter holder and holds a Masters in Business Administration from the Columbia University Graduate School of Business. He received a Bachelor of Business Administration from Howard University in Washington, DC.

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.

**Kelly M. Williams**
LPAC Chair
**Founding Chair & Co-CEO**
Private Equity Women Investor Network (PEWIN)

**Brian Ahrens**
**Executive Vice President, Director, Strategic Investment Research Group**
Prudential

**Cheryl D. Alston**
**Executive Director & Chief Investment Officer**
Dallas Employees' Retirement Fund

**Mark Baumgartner**
**Chief Investment Officer**
Carnegie Corporation of New York

**Reid Bernstein**
**Chief Executive Officer & Chief Investment Officer**
Amerin Partners

**Wes Bradle**
**Senior Portfolio Manager**
State Board of Administration of Florida

**Michael Buchman**
**Vice President & Chief Investment Officer**
The Conrad N. Hilton Foundation

**Elizabeth A. Caldas**
**Private Equity Investment Management Division**
United Nations Joint Staff Pension Fund

**Laureen Costa**
**Portfolio Manager**
JP Morgan Asset Management

**Lindsay Creedon**
**Partner**
StepStone

**Karen Eifler**
**Vice President, Head of Marketables**
Children's Hospital of Philadelphia

**Nancy Fahmy**
**Managing Director, Head of Alternative Investments**
Bank of America Merrill Lynch

**Tarrell V. Gamble**
**Trustee**
Alameda County Employees' Retirement Association

**Kathryn Gernert**
**Managing Director**
Texas Permanent School Fund

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

---

**Deborah Harmon**
**Co-Founder & Chief Executive Officer**
Artemis Real Estate Partners, LLC

**Elizabeth M. Hewitt**
**Chief Investment Officer & Senior Vice President**
Alfred P. Sloan Foundation

**Jarvis V. Hollingsworth**
**Chair of the Board**
Teacher Retirement System of Texas

---

**Greg Jania**
**Global Co-Head of Private Equity**
APG Asset Management

**Dana Johns**
**Senior Portfolio Manager, Private Equity**
Maryland State Retirement and Pension System

**Danita Johnson**
**Managing Director, Real Assets**
Maryland State Retirement and Pension System

---

**William Lee**
**Senior Vice President & Chief Investment Officer**
New York-Presbyterian Hospital

**Kim Y. Lew**
**President & Chief Executive Officer**
Columbia Investment Management Company

**Bryan Lewis**
**Chief Investment Officer**
United States Steel Corporation

---

**Juan Lopez**
**Investment Officer**
Municipal Employees' Annuity and Benefit Fund of Chicago

**Kenyatta K. Matheny**
**Chief Investment Officer**
EquiTrust Life Insurance Company

**Sylvester McClearn**
**Senior Investment Officer**
New York State Common Retirement Fund

---

**William Mclean**
**President & Chief Investment Officer**
Spider Management Company

**Michael Miller**
**Chief Investment Officer**
Crewcial Partners, LLC

**Angela Miller-May**
**Chief Investment Officer**
Illinois Municipal Retirement Fund



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

**Sherif Nahas**
**Director, Private Equity & Real Assets**
Ford Foundation

**May Ng**
**Vice President & Chief Investment Officer**
The Annie E. Casey Foundation

**Dr. Kola Olofinboba**
**Managing Partner**
Fairview Capital Partners

**Brian S. O'Neil**
**Chief Investment Officer**
Robert Wood Johnson Foundation

**David Ourlicht**
**Commissioner**
New York State Insurance Fund

**Edward Powers**
**Managing Director**
HarbourVest Partners

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

**André Rice**
**President**
Muller & Monroe Asset Management, LLC

**Christopher Rowe**
**Managing Director, Investments Group**
Church Pension Group

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

**Kimberly Sargent**
**Chief Investment Officer**
The David & Lucile Packard Foundation

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

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

**Chirag H. Shah***
**Senior Portfolio Manager, Private Equity & Special Opportunities**
Alaska Permanent Fund Corporation

**Dhvani Shah**
**Chief Investment Officer**
JM Family Enterprises, Inc

**Cody Steele**
**Real Assets Investment Professional**
Pennsylvania Public School Employees' Retirement System

**Joshua Stern**
**Director, Private Investments**
Robert Wood Johnson Foundation

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

**Stefan Strein**
**Chief Investment Officer**
Cleveland Clinic

**Jones Thomas**
**Investment Director**
Capricorn Investment Group

**Paul Yett**
**Managing Director**
Hamilton Lane

**Kara Zanger**
**Global Head of Legal**
Pantheon

**Caixia Ziegler**
**Managing Director of Real Assets**
MacArthur Foundation

**Patricia Miller Zollar**
**Managing Director**
Neuberger Berman

# SEO Board of Directors

**Henry R. Kravis**
Chairman
**Co-Founder &**
**Co-Executive Chairman**
KKR

**Michael Osheowitz**
SEO Founder

**Amy Ellis-Simon***
Vice Chair
**Managing Director**
Morgan Stanley

---

**Ramsey D. Smith***
Vice Chair
**Founder**
ALEX.fyi
**Former Managing Director**
Goldman Sachs

**Gilbert Andrew Garcia. CFA***
Treasurer
**Managing Partner**
Garcia Hamilton & Associates, LP

**Mark Bieler**
Secretary
**President**
Mark Bieler & Associates

---

**Walter K. Booker***
Chairman Emeritus
**Chief Operating Officer**
MarketCounsel

**William A. Goodloe^**
**President & CEO**
SEO

**Hara Amdemariam***
**Managing Director**
Lazard

---

**James Attwood**
**Managing Director**
The Carlyle Group

**Frank A. Baker***
**Co-Founder & Managing Partner**
Siris Capital Group, LLC

**Milton Berlinski**
**Co-Founder & Managing Partner**
Reverence Capital Partners

---

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

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

**John Civantos***
**Co-Head of Private Capital Group**
MSD Partners

---

**Hythem T. El-Nazer**
**Managing Director**
TA Associates

**Deborah Harmon**
**Co-Founder & CEO**
Artemis Real Estate Partners

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

**Carla A. Harris***
**Senior Client Advisor**
Morgan Stanley

**Nic Humphries**
**Senior Partner and Executive Chairman**
Hg

**Chris Lee***
**Partner**
KKR

**Eric J. Lee**
**General Partner**
Welsh, Carson, Anderson & Stowe

**Ninon Marapachi***
**Managing Director**
Bank of America Merrill Lynch

**Maybel Marte***
**Managing Director**
BlackRock

**Kenneth B. Mehlman**
**Partner**
KKR

**Kammy Moalemzadeh***
**Founder & Managing Partner**
Arcadia Investment Partners, LLC

**Verdun S. Perry***
**Global Head**
Blackstone Strategic Partners

**Joseph J. Plumeri II**
**Executive Chairman**
SELECTA Group AG

**Oscar Salazar**
**Entrepreneur & Technologist**
Ogon, LLC

**Julian C. Salisbury**
**Global Co-Head of Asset Management**
Goldman Sachs

**Edward Tam***
**Managing Director**
HPS Investment Partners, LLC

**Keith H. Wofford***
**Partner**
White & Case LLP

**Kathryn Wylde**
**President & CEO**
Partnership for New York City

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

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**

**80%+**
**of SEO Scholars attending college are first-generation college graduates**

**80%+**
**of SEO Scholars attend a school ranked as top-100 in *U.S. News & World Report***

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

**850+**
college students in the SEO Career Summer Intern Class of 2021

**150+**
partners in 45+ cities

**7,500+**
alumni

**SEO Tech Developer**

In 2021, we launched the SEO Tech Developer under SEO Career. Created with the support of tech industry leaders, SEO Tech Developer is an intensive program that enables Black, Latinx, and Native American students to get the training, outside of a college classroom, needed to compete for coveted tech roles.

**Internship Areas:**

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

SEO Career

SEO Alternative Investments is an industry-wide program that provides education, exposure, training, and mentorship opportunities to high-achieving professionals who have been historically excluded 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**

**300+**
**candidates in pipeline for 2022 AIFP**

**60+**
**Alt. Investments partners**

SEO Alternative Investments

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

**Fellows have become:**

- Lawyers
- Advocates
- Business leaders
- Politicians

**180+**
**Fellows in the Class of 2022**

**47**
**SEO Law partners in 17 cities around the nation**

**1,700+**
**SEO Law alumni**

**45**
**Catalyst Scholars in the Class of 2022**

SEO Law

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.

**12,000+**
**Alumni of SEO USA programs**

**21,000+**
**Alumni of SEO programs around the globe**

**10**
**Leadership Institute partners**

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

SEO Leadership Institute


OAKTREE IS A PROUD SPONSOR OF SEO'S

13TH ANNUAL ALTERNATIVE INVESTMENT CONFERENCE

Oaktree is a leader among global investment managers specializing in alternative investments, with $166 billion in assets under management as of December 31, 2021. 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 20 cities worldwide.

oaktreecapital.com


**Congratulations to our founder, Orlando Bravo, on receiving The Reginald F. Lewis Achievement Award in recognition of your dedication and leadership in expanding opportunities for diverse professionals within private equity.**

**We are proud to support SEO's vital work to promote diversity and inclusion, and are committed to providing access and opportunity for diverse talent within the industries in which we operate.**

Thoma Bravo is one of the largest private equity firms in the world, with over $103 billion in assets under management as of December 31, 2021. Over the past 20 years, we have acquired more than 375 software and technology companies representing over $190 billion of value.

To learn more, visit thomabravo.com

THOMABRAVO

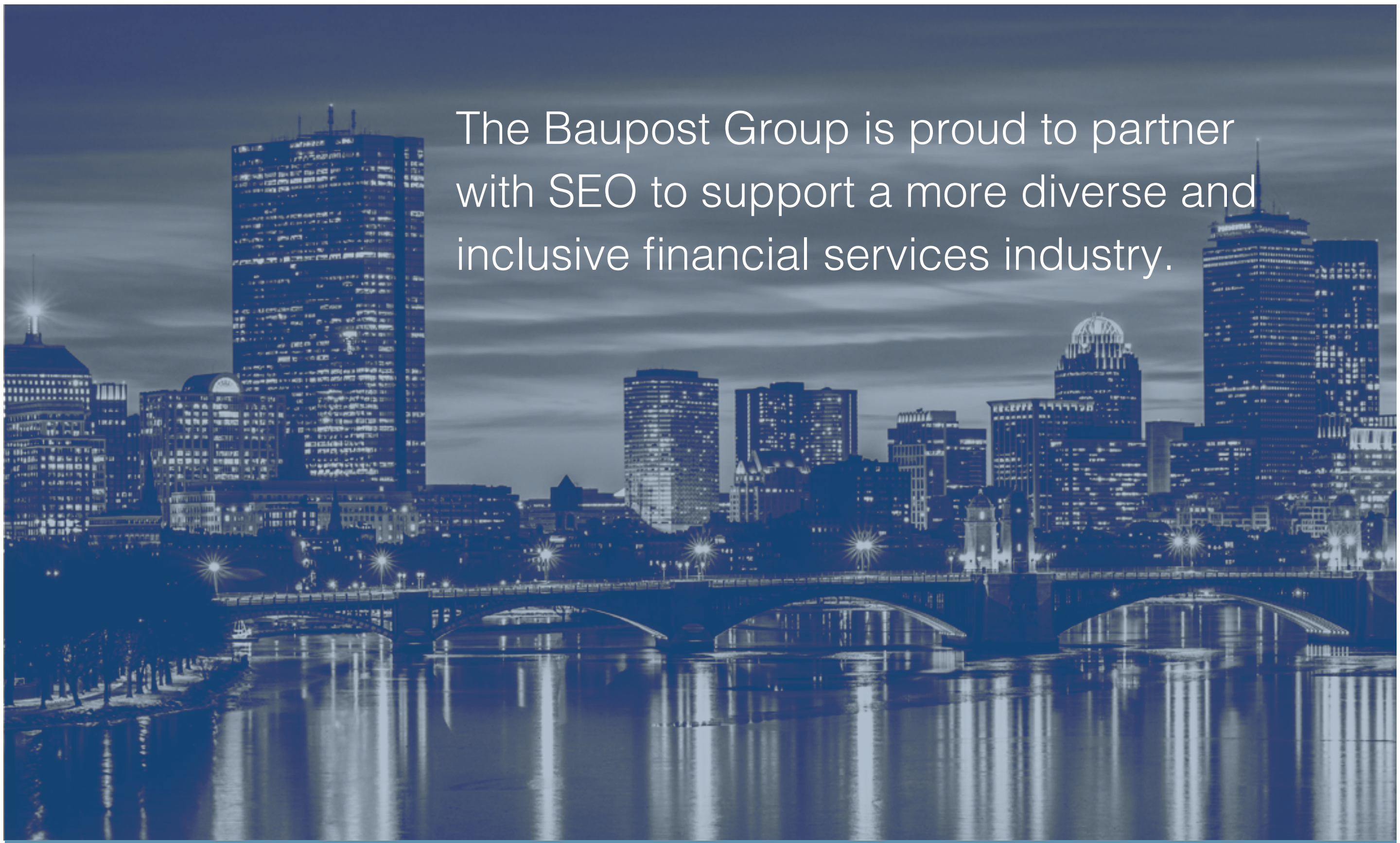
# FITCH RATINGS IS PROUD TO SPONSOR SEO'S THIRTEENTH ANNUAL ALTERNATIVE INVESTMENTS CONFERENCE

**In support of SEO's commitment to closing the opportunity gap in underserved and underrepresented communities**

Fitch Ratings is a leading provider of credit ratings, commentary, and research. We offer global perspectives shaped by strong local market experience and credit market expertise. We believe that diverse teams achieve better results by leveraging a broad set of ideas and perspectives. Our ability to harness the ideas, experiences and talents of Fitch's diverse and global workforce is integral.

FitchRatings

fitchratings.com | @fitchratings


The Baupost Group is proud to partner with SEO to support a more diverse and inclusive financial services industry.

BAUPOST


AVANCE
AVANCE IS A PROUD SPONSOR OF SEO's 13TH ANNUAL ALTERNATIVE INVESTMENTS CONFERENCE
Avance Investment Management, LLC is a private equity firm guided by partnership, experience, diversity and growth. The firm focuses on transformational growth opportunities in the Services and Consumer Sectors across the U.S.


ICV Partners is proud
to support
SPONSORS FOR EDUCATIONAL
OPPORTUNITY'S
13th Annual Alternative
Investment Conference
MAKING CONNECTIONS THAT MATTER
ICV knows the importance of diversity to be a
value-added partner and commends SEO for
providing the education and resources to create
opportunities for diverse individuals.
ICV PARTNERS
Partners in your Future
Call or visit us online to learn more.
212.455.9600 • www.icvpartners.com


**FIRM**
Neuberger Berman was founded in 1939 to do one thing: deliver compelling investment results for our clients over the long term. This remains our singular purpose today, driven by a culture rooted in deep fundamental research, the pursuit of investment insight and continuous innovation on behalf of clients, and facilitated by the free exchange of ideas across the organization.

**NEUBERGER BERMAN PRIVATE EQUITY**
A leading global private equity investor with 35 years of experience that has managed over $86 billion of commitments since inception through January 2022 across private equity fund investments in the primary and secondary markets, direct equity co-investments and debt investments in private equity-owned companies and a number of specialty strategies. Its dedicated team of over 200 professionals has a global presence with offices in the U.S., Europe and Asia. In 2021, Neuberger Berman Private Equity committed over $16 billion to private equity investments across primaries, secondaries and co-investments.

**Visit us at www.nb.com**

**We are proud to sponsor the SEO Alternative Investments Conference**

SEO



NEUBERGER | BERMAN


ARDIAN
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 $125bn under management or advised.
And that means we can make an even bigger difference.
OUR OFFICES
PARIS • LONDON • FRANKFURT • MILAN • ZURICH • JERSEY • LUXEMBOURG • MADRID
NEW YORK • SAN FRANCISCO • SANTIAGO • BEIJING • SINGAPORE • TOKYO • SEOUL
@Ardian
@Ardian
www.ardian.com


Campbell Lutyens
is proud to support
SEO's Alternative
Investment Conference.
Global and independent private
markets advisor
Fund placement | Secondary advisory | GP capital advisory
www.campbell-lutyens.com
CAMPBELL
LUTYENS

TRIDENT

Reimagining
Private Equity &
Small Business Investing

*Trident is proud to sponsor the SEO Alternative Investments Conference & promote DEI in private equity*

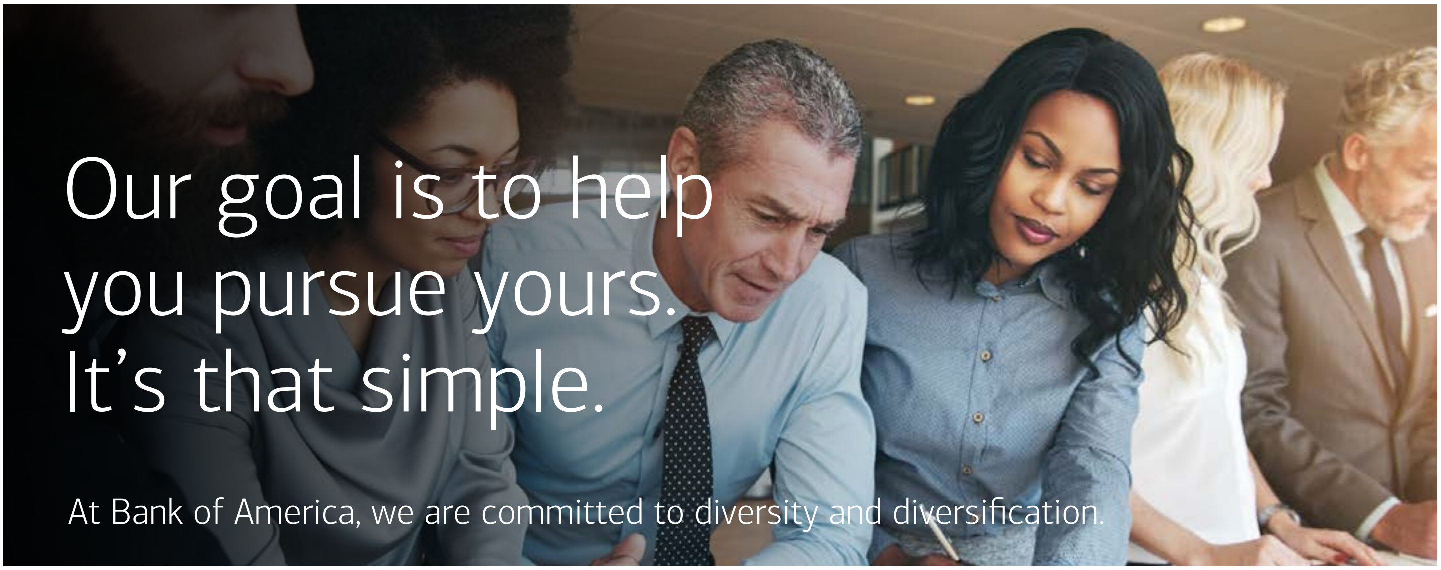
Trident uses data and technology to invest in small businesses and provide equitable access to the American Dream

www.trident.co


AEA Investors
is a proud sponsor of the
2022 Annual Alternative Investments Conference
AEA
A Proven Global Investment Partner
With over 50 years of building our institutional knowledge, network and resources, AEA's global, integrated investment platform supports leading companies with private equity, growth capital and private credit solutions to drive sustainable, long-term growth
New York | San Francisco | Connecticut | Munich | Shanghai | London
www.aeainvestors.com
www.linkedin.com/company/aea-investors-lp

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.

BainCapital




The Investment Solutions Group Alternative Investments team is proud to participate in the 2022 Sponsors for Educational Opportunity Alternative Investments Conference.

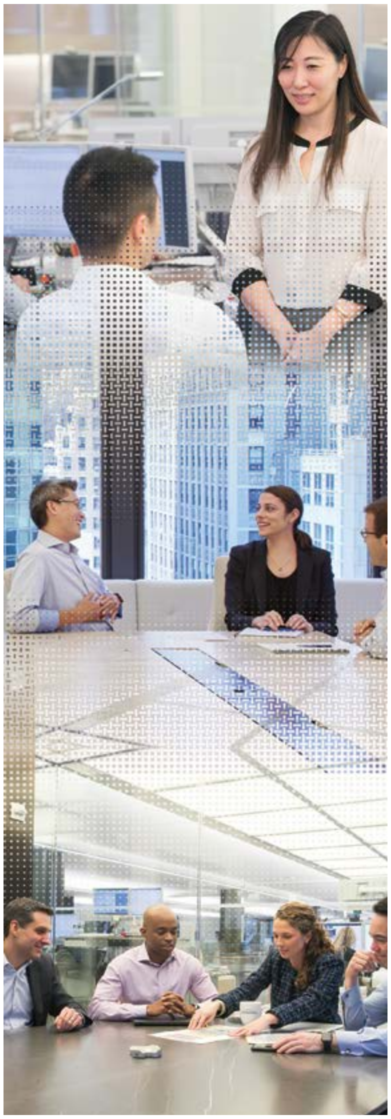
For more information visit ml.com/solutions/alternative-investments.html

BANK OF AMERICA

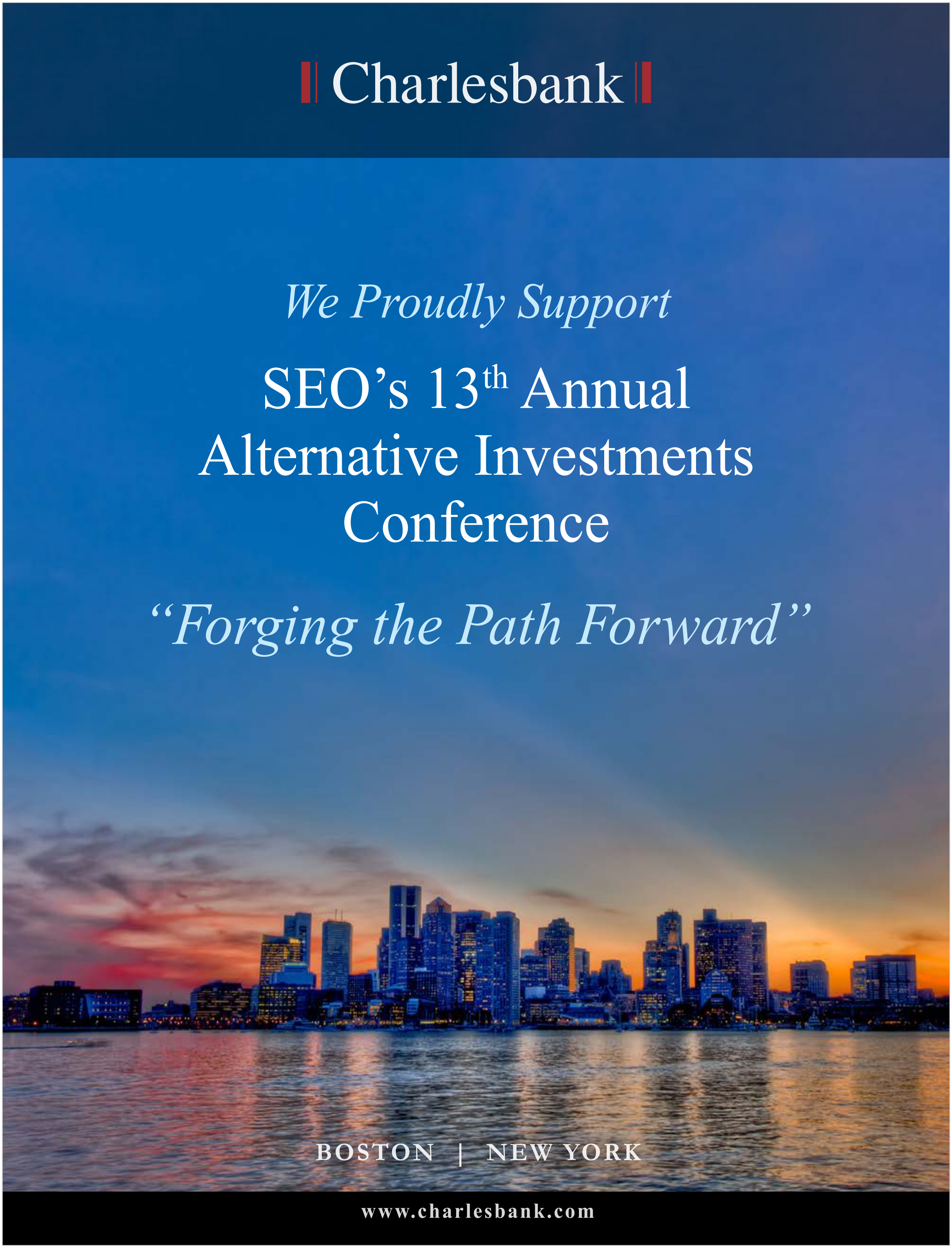
Centerbridge

# CENTERBRIDGE PARTNERS IS PROUD TO SUPPORT

## THE 13TH ANNUAL SEO ALTERNATIVE INVESTMENTS CONFERENCE



For additional information, **please visit Centerbridge.com**


Charlesbank
We Proudly Support
SEO’s 13th Annual
Alternative Investments
Conference
“Forging the Path Forward”
BOSTON | NEW YORK
www.charlesbank.com


The DigitalBridge Difference
INVESTOR • OPERATOR • BUILDER
With a heritage of investing capital efficiently, operating digital infrastructure assets, and building businesses, we have a unique, innovative strategy to growth and value creation on behalf of our customers and investors.
TOWER
DATA CENTER
SMALL CELL
FIBER
EDGE INFRASTRUCTURE
DigitalBridge is proud to sponsor the
13th Annual Alternative Investments Conference
DIGITALBRIDGE
digitalbridge.com | NYSE: DBRG


Creating value
Building a more resilient future
Forging a path forward
KKR, a leading global investment firm, seeks to provide innovative financial solutions and investment vehicles to help our investors achieve their investment goals.
Visit kkr.com to learn about our alternative investments.
KKR

LGP
LEONARD GREEN
& PARTNERS

LGP appreciates the benefits of diversity of thought through diversity of personnel

LGP is proud to support

SEO


OAKTREE IS A PROUD SPONSOR OF SEO'S

# 13TH ANNUAL ALTERNATIVE INVESTMENT CONFERENCE

Oaktree is a leader among global investment managers specializing in alternative investments, with $166 billion in assets under management as of December 31, 2021. 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 20 cities worldwide.

oaktreecapital.com

## PROVIDENCE
EQUITY PARTNERS

**Providence Equity Partners is a proud sponsor of SEO and its 13th Annual Alternative Investments Conference. We believe a diverse team strengthens organizations and empowers teams to make better decisions. Providence is committed to improving the representation of underrepresented professionals in the alternative investments industry and to supporting SEO as a catalyst of change.**

We are private equity specialists, focused on growth-oriented media, communications, education and technology companies throughout North America and Europe.

PROVIDENCE | NEW YORK | LONDON
www.provequity.com

A proud partner of SEO

TA

TA Associates is proud to support

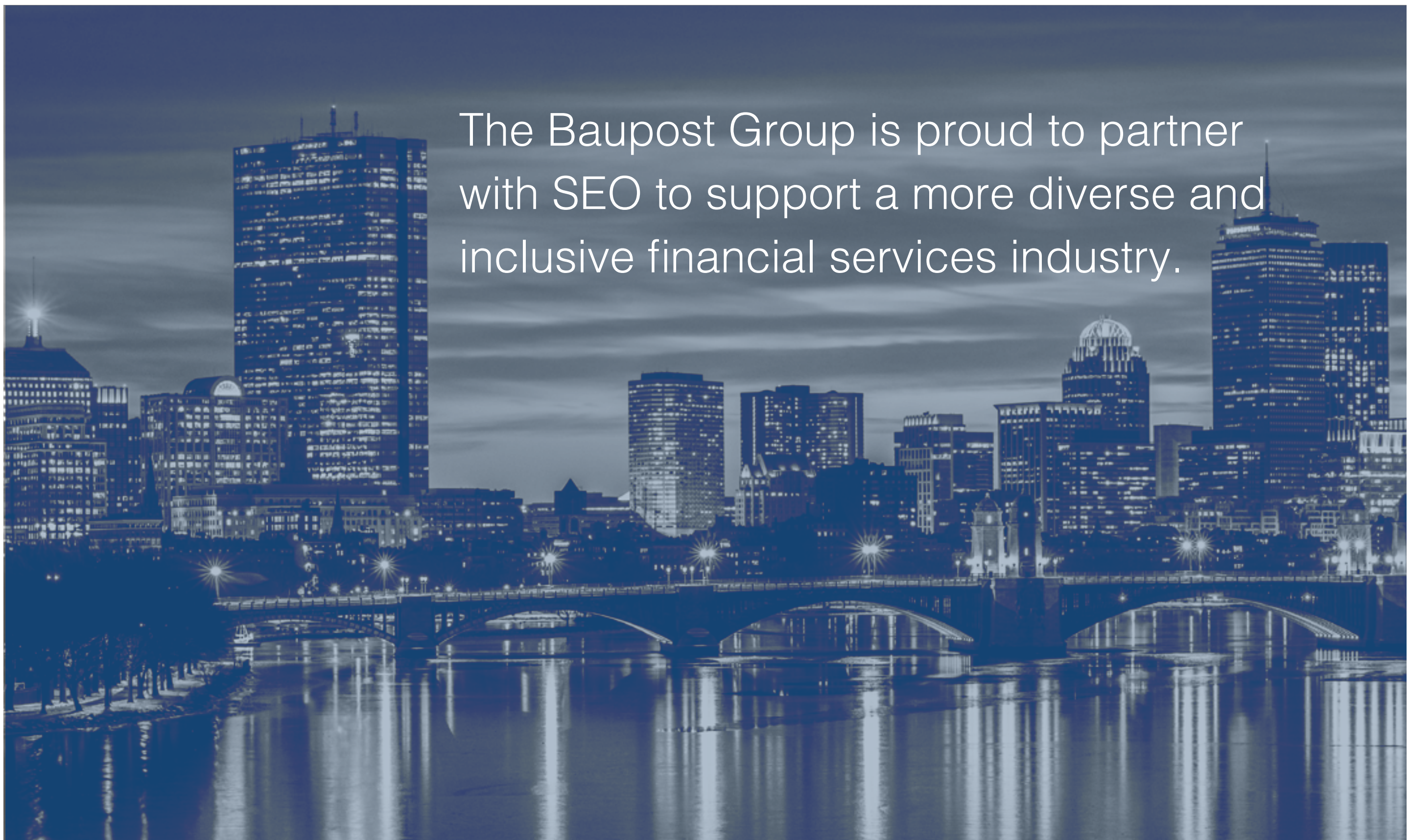
# SEO'S 13TH ANNUAL ALTERNATIVE INVESTMENTS CONFERENCE

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 550 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 $47.5 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.

BOSTON ▪ SILICON VALLEY ▪ LONDON ▪ MUMBAI ▪ HONG KONG






The Baupost Group is proud to partner with SEO to support a more diverse and inclusive financial services industry.

BAUPOST


THL Thomas H. Lee Partners
est. 1974
proud sponsor of
SEO's 13th Annual
Alternative Investments
Conference (AICON)
Over 45 years
of private equity
investing
Investing in middle market growth companies in
Healthcare, Financial Services and Technology &
Business Solutions
Deep sector expertise
Strong partnerships
Thesis-driven approach
Collaborative culture
Building Great Companies
www.thl.com

VISTA IS A PROUD SPONSOR OF THE

# SEO Alternative Investments Conference

Vista supports SEO's mission to provide talented and motivated young people from underserved and underrepresented communities with access to superior educational and career opportunities.

Vista is a leading global investment firm. The firm exclusively invests in enterprise software, data and technology-enabled organizations across private equity, permanent capital, credit and public equity strategies, bringing an approach that prioritizes creating enduring market value for the benefit of its global ecosystem of investors, companies, customers and employees. Vista's investments are anchored by a sizable long-term capital base, experience in structuring technology-oriented transactions and proven, flexible management techniques that drive sustainable growth. Vista believes the transformative power of technology is the key to an even better future – a healthier planet, a smarter economy, a diverse and inclusive community and a broader path to prosperity. Further information is available at **vistaequitypartners.com**.

SEO
ANNUAL
AWARDS
DINNER
2022

SAVE THE DATE

**Thursday, April 21, 2022, 6 PM**

New York Hilton Midtown, New York City

**HONOREES**

**Kenneth I. Chenault**
*Chairman & Managing Director*
General Catalyst
*Former Chairman and CEO*
American Express

**Xavier A. Gutierrez**
*President & CEO*
NHL Arizona Coyotes Hockey Team
SEO '94 Alumnus

**LIFETIME ACHIEVEMENT AWARD**

**Kathryn Wylde**
*President & CEO*
Partnership for New York City

**DINNER CHAIR**

**Jamie Dimon**
*Chairman & CEO*
JPMorgan Chase & Co.

Sponsorship opportunities available. Please contact
Steve Sagner, SEO VP Development for more information here.

13TH Annual

# SEO AICON

Alternative Investments Conference

**SEO Alternative Investments**

55 Exchange Place
Suite 601
New York, NY 10005

aicon@seo-usa.org

SEO (Sponsors for Educational Opportunity)