

14<sup>TH</sup> Annual

# SEO AICON

Alternative  
Investments  
Conference



Orlando Bravo, Co-Founder & Managing Partner, Thoma Bravo  
(SEO Board Member & 2022 SEO Reginald F. Lewis Award Recipient)

## Conference Programming

**SEO** Alternative  
Investments

**Wednesday, April 5, 2023**

**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 60-year history of supporting talented and motivated young people who have been historically excluded from educational and career opportunities.





**Featured Speakers**

**Limited Partner Leadership Breakfast**



Welcome Speaker  
**William Goodloe\*\***  
President & CEO  
SEO



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



Fireside Chat  
**Chris Lee\*\*\***  
Head of Real Estate Americas  
KKR



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



Speaker  
**Andrew Fairbairn\***  
Executive Vice President  
SEO



Speaker  
**Dakotah Rice\***  
Founder & Chief Executive Officer  
Poolit

**General Conference**



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



Fireside Chat  
**Adebayo Ogunlesi**  
Founding Partner, Chairman & Chief Executive Officer  
Global Infrastructure Partners



Fireside Chat  
**David Grain**  
Chief Executive Officer & Founder  
Grain Management



Fireside Chat  
**Verdun S. Perry\*\*\***  
Global Head  
Blackstone Strategic Partners



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



Moderator  
**Runa Alam**  
Co-Founder & Chief Executive Officer  
Development Partners International

Dear Friends,

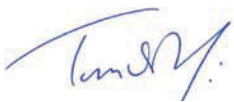
Greetings to all those gathered this week for the 14th Annual Alternative Investments Conference hosted by SEO. Since 1963, SEO has organized training and internship programs to prepare young people from historically excluded groups for success and service.

A focus of the 2023 Conference 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 connects 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. Groundwork for the Conference begins years earlier with the SEO Scholars initiative, an innovative effort to prepare secondary school students for success in higher education. A multi-year, cost-free academic program, SEO Scholars aims at helping 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 Conference connects 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. ”

**Dear Friends,**

It is my pleasure to extend best wishes to all attending SEO'S 14th 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 14th 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 with us participants representing many perspectives within the industry, from LPs to GPs, large funds to emerging managers.

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 TPG, our Conference Catalyst Sponsor; and to Grain Management and KKR, our Conference Underwriting Sponsors. Added thanks to Siris Capital Group, our Alumni Underwriting Sponsor; and Bank of America, Ropes & Gray, and Weil, Gotshal & Manges, our Exhibiting Sponsors.

In 2009, with the wholehearted commitment of KKR 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 68 partner firms listed in this journal, with more in the pipeline. SEO's AIFP provides education, training, and mentoring to strengthen the skills of first- through third-year banking 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.

In this journal we also list the many organizations that partner with SEO in preparing underrepresented talent for opportunities in the alternative investments sector.

If you are not already an SEO alternatives partner, please consider joining our efforts to widen the entryway for opportunities in the alternatives industry. A partnership with SEO 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**  
President & CEO  
SEO



“

If you are not already an SEO alternatives partner, please consider joining our efforts to widen the entryway for opportunities in the alternatives industry. A partnership with SEO is an investment where past performance **does** guarantee future results. ”

**SEO gratefully acknowledges the PREA Foundation for its \$8 million, five-year investment to support the SEO Career program.**

The Foundation's grant – SEO's largest multi-year grant – will continue developing and placing a pipeline of Black, Hispanic/Latinx, and Native American interns and entry-level candidates at top real estate firms. The renewed funding will impact over 3,850 students and young professionals and provide an economic impact of over \$85 million between internship wages and starting salaries over the next five years.



**PREA**foundation  
Diversity Builds Better Futures

The PREA Foundation furthers the interests and values of the institutional real estate investment community by advancing industry-wide diversity and inclusion. Over the last five years, the Foundation has made grants to launch diversity recruitment programs that have provided over 1,000 young people the opportunity to explore careers in the institutional real estate industry. Our vision is a commercial real estate industry that reflects the rich diversity of our society.

<p><b>Catalyst Sponsor</b></p> 	<p><b>Underwriting Sponsors</b></p>   	<p><b>Exhibiting Sponsors</b></p>   
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**Diversity Friends**



Marketing Partners



Alternative Investments Fellowship Program (AIFP) Partners



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



Hedge Fund Academy Partner



Educational Partner



6:00pm - 9:00pm

Pre-Conference Reception



**William Goodloe\*\***  
President & CEO  
SEO



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



**Eric Doppstadt**  
Vice President &  
Chief Investment Officer  
Ford Foundation



**Darren Walker**  
President  
Ford Foundation



**Roy Swan**  
Director, Mission Investments  
Ford Foundation

Wednesday, April 5, 2023 Agenda (All times listed ET)

8:00am - 9:15am

LP Breakfast

Welcome Speech



**William Goodloe\*\***  
President & CEO  
SEO

Introduction



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

Fireside Chat



**Chris Lee\*\*\***  
Head of Real Estate Americas  
KKR



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

Speaker



**Andrew Fairbairn\***  
Executive Vice President  
SEO



**Dakotah Rice\***  
Founder  
& Chief Executive Officer  
Poolit

**8:30am General Registration Begins**

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

General Welcome/Opening Remarks



Welcome  
**William Goodloe\*\***  
 President & CEO  
 SEO

**9:45am - 10:35am**

Fireside Chat (Plenary Session)



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



**Adebayo Ogunlesi**  
 Founding Partner, Chairman  
 & Chief Executive Officer  
 Global Infrastructure Partners

**10:35am - 10:40am**



Emcee  
**Pamela Brylski\***  
 Head of Family Offices,  
 Endowments & Foundations  
 Shenkman Capital



**10:45am - 11:35am**

**Breakout Panel**

Sponsored by:



**The Growing Importance of Alternative Investments for Life Insurance Companies (Breakout Room 1)**

The symbiotic relationship between Life Insurance companies and the Alternative Investments Industry continues to expand. Life Insurance Companies seek long term investments to match their long term liabilities. Leading Managers in the Alternatives space are looking to partner with stable sources of long term investment capital. Successful placement of Alternatives with Life Insurance companies requires a clear understanding of their investment goals and regulatory constraints. Our panel of leading industry players will help you get there.

- Moderator **Ramsey Smith\*\* \***, Founder, ALEX.fyi  
 Panelists **Juliya Chekmarova**, Managing Director, Ardea Partners  
**Scott Jeffreys**, Director, Insurance and Strategic Finance, KKR  
**Craig Sabal**, Deputy Chief Investment Officer, New York Life Insurance Company  
**Kelly A. Saltzgeber**, Executive Vice President & Chief Investment Officer, Genworth Financial

Sponsored by:



**GP Stakes (Breakout Room 2)**

This panel will explore 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 **Elizabeth Browne**, Managing Director, GCM Grosvenor  
 Panelists **Sarah Davidoff**, Partner, Ropes & Gray  
**Shohana Jannat\***, Managing Director, Ardea Partners  
**Yup S. Kim**, Investment Director, CalPERS Private Equity  
**Sean Ward**, Senior Managing Director, Blue Owl Capital

Sponsored by:



**Hedge Fund (Breakout Room 3)**

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 **Mark Sutterlin**, Head of Hedge Fund Origination & Product Management, Bank of America  
 Panelists **Keith Friedman**, Managing Director, GCM Grosvenor  
**Dennis Jean-Jacques**, Founder & Chief Investment Officer, Ocean Park Investments  
**Priya Kaftan**, Head of Investor Relations & Product Strategy, Heard Capital  
**Andy McElaney**, Partner, The Baupost Group

**10:45am - 11:35am**

**Breakout Panel**

Sponsored by:



**Private Equity (Breakout Room 4)**

Our panelists discuss how they are thinking about managing their portfolios in light of recent macro events, credit events, and the changing interest rate landscape.

Moderator **Robert Holley\***, Senior Investment Officer, Baltimore Fire & Police Employees' Retirement System

Panelists **Heather Faust**, Managing Partner & Co-Founder, Argand Partners

**Joseph Haslip**, Managing Director, Valor Equity Partners

**Jennifer Hoh**, Managing Director, Providence Equity Partners

**Avi Oler**, Managing Director & Chief Legal Officer, Digital Alpha

11:45am - 12:35pm

**Breakout Panel**

Sponsored by:



**Secondaries (Breakout Room 1)**

Competition in the Secondaries market is rising fast with more participants and larger fund sizes. These trends are expected to continue thanks to an ever-more diverse seller universe and persistent need for portfolio management solutions. Demand within the asset class is set against a backdrop of geopolitical and macroeconomic uncertainty. Our panelists discuss the challenges and opportunities for secondary buyers in the current environment.

- Moderator **Gerald Cooper, Partner**, Campbell Lutyens
- Panelists **Rikesh Mohandoss, Partner**, Glendower Capital
- Trey Muldrow, Partner**, Weil, Gotshal & Manges
- Josh Nabatian, Partner**, Arcadia Investment Partners
- Simon Oak, Principal**, Lexington Partners

Sponsored by:



**Attracting Capital as an Emerging Manager (Breakout Room 2)**

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

- Moderator **Miguel Silva, Investment Officer**, CalPERS
- Panelists **Gabriel de Alba, Founder & Managing Partner**, GDA Luma
- André Rice, President**, Muller & Monroe Asset Management
- Bharath Srikrishnan, Founder & Managing Partner**, BharCap Partners
- Eric Taylor, Founder, Chief Executive Officer & Chief Investment Officer**, Trident

Sponsored by:



**Credit (Breakout Room 3)**

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 **Mandy Pan, Vice President**, J.P. Morgan Alternative Asset Management
- Panelists **Frank Cross, Managing Director**, Brightwood Capital Advisors
- Robert Galeano, Head of Investor Relations**, Standard General
- Andre A. Hakkak, Chief Executive Officer & Co-Founder**, White Oak Global Advisors
- Milwood Hobbs, Jr., Managing Director & Head of North American Sourcing & Origination**, Oaktree Capital Management



11:45am - 12:35pm

Breakout Panel

Sponsored by:



**Venture Capital (Breakout Room 4)**

The last few years have been historic times for the venture capital industry. We've seen valuations fluctuate, billion-dollar enterprises fall and long-standing banks collapse - all having significant second-order effects on the industry. In this panel, we'll have experts from a variety of different functions within VC breaking down the market we're currently in and what to expect in the coming years.

Moderator **Jon Smith**, Vice President, 645 Ventures

Panelists **David R. Jones**, Co-Founder, President & Chief Executive Officer, CastleOak Securities

**Thomas V. Kennedy**, Chief Investment Strategist, J.P. Morgan

**Marcus Lindroos**, Principal, Primary Investments, Adams Street Partners

**Anouk Van Der Boor**, Managing Director, Private Partnerships, The Rockefeller University

12:45pm - 1:50pm

Lunch & Reginald F. Lewis Award



Welcome  
**William Goodloe\*\***  
President & CEO  
SEO



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



Presented To  
**David Grain**  
Chief Executive Officer &  
Founder  
Grain Management

Sponsored by:



Fireside Chat



**David Grain**  
Chief Executive Officer &  
Founder  
Grain Management



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

1:50pm - 2:40pm

Plenary Session (Roundtable)

Family Office CIO Roundtable



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



Panelist  
**Alisa Mall**  
Chief Investment Officer  
Dell Family Office



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

2:40pm - 3:30pm

Plenary Session (Roundtable)

Sponsored by:



Public Pensions & Endowments Roundtable



Moderator

**Runa Alam**  
Co-Founder & Chief  
Executive Officer  
Development Partners  
International



Panelist

**Steven Meier**  
Chief Investment Officer &  
Deputy Comptroller for Asset  
Management  
Office of NYC Comptroller



Panelist

**Pamela Pavkov**  
Partner  
TPG Next



Panelist

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

**3:50pm - 4:40pm**

**Breakout Panel**

Sponsored by:



**Real Estate (Breakout Room 1)**

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 Mitro**, Partner, StepStone Group

Panelists **Danita Johnson**, Managing Director, Real Assets, Maryland State Retirement and Pension System  
**Eric Requenez**, Partner, Ropes & Gray  
**Lenny Stokes**, Managing Director, Clover Capital  
**Careina Williams\***, Managing Director, Sundance Bay

Sponsored by:



**Sustainable Investing (Breakout Room 2)**

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

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

Panelists **Angel Acconcia**, Partner, ArcLight  
**Justin Conway**, Vice President, Investment Partnerships, Calvert Impact Capital  
**Lila Preston**, Partner & Head of Growth Equity, Generation Investment Management  
**Radhika Shroff**, Managing Director, Private Equity Impact Investing, Nuveen

Sponsored by:






**Stepping Out With Fund I (Breakout Room 3)**

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

Moderator **Yokasta Segura-Baez**, Managing Director, Investor Relations, ArcLight

Panelists **Patricia Miller Zollar**, Managing Director, Neuberger Berman  
**David Perez**, Co-Founder & Managing Partner, Avance Investment Management  
**Sanjiv Shah**, Managing Director, HarbourVest Partners  
**Fernando Vigil\***, Managing Partner & Chief Investment Officer, Teca Partners

<p><b>3:50pm - 4:40pm</b></p>	<p><b>Breakout Panel</b></p>
<p>Sponsored by:</p> 	<p><b>Breaking Into The Buyside (Breakout Room 4)</b>          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.</p> <p>Moderator <b>Jose Arredondo*</b>, Principal, Warburg Pincus          Panelists <b>Milo Dee</b>, Principal, Berkshire Partners  <b>Stacy Levine</b>, Partner, Amity Search Partners  <b>Martha Masiarz</b>, Vice President, Odyssey Search Partners  <b>Nellie McCullough</b>, Principal, Henkel Search Partners</p>
<p><b>4:45pm - 6:00pm</b></p>	<p><b>Networking Cocktail Reception</b></p>
<p>Sponsored by:</p> 	
<p><b>All Day</b></p>	<p><b>Networking &amp; 1:1 LP/GP Meetings</b></p>
	<p><b>Scan the below QR Code to access the AICON mobile app.</b>          Gain access to the conference agenda, digital program, and live chat features!</p> 





Welcome Speaker

**William Goodloe\*\***

**President & CEO**

SEO

Since 2001, William has been President & CEO of SEO, which has a mission of creating a more equitable society. SEO is widely known for developing and delivering programs that close the opportunity gap for young people who have been historically excluded from top colleges and coveted industries.

Each year, SEO serves 7,000+ high school students, college students, and young professionals nationwide, through a variety of high-impact programs. SEO's success during William's tenure has led to a 900% growth in young people served each year, along with SEO's annual revenues increasing by over \$42 million.

William also guided The Campaign for SEO, which fully funded the purchase of a new headquarters.

From 1996 through 2001, William was Executive Director of the Inner-City Scholarship Fund, which supports NYC Catholic schools serving children from low-income families. William led dramatic increases in student scholarships, school capital repairs, and funding for schools, with more than \$100 million raised in annual and endowment funds.

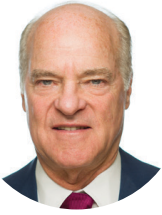
William began his career in advertising and sales management, including roles with Procter & Gamble and Corning Inc.

William is a trustee of the Altman Foundation and Partnership Schools. William has received several recognition awards and has been appointed by two NYC Mayors to citywide task forces.

William is the former board President of the NYC Association of Fundraising Professionals and is an active member of Black Agency Executives. He previously served on advisory boards for the Federal Reserve Bank of NY and Columbia University.

William received his MBA from Columbia Business School and B.S. from American University.

## Speaker Biographies

**Henry R. Kravis\*\***

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

KKR  
(SEO Board Chairman)

Henry Kravis 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.

**Eric Doppstadt**

**Vice President & Chief Investment Officer**

Ford Foundation

Eric Doppstadt is vice president and chief investment officer of Ford Foundation. He is responsible for managing the foundation's investment portfolio.

Eric joined Ford in 1989 as resident counsel, working closely with the investment team. He held the position for six years, before assuming senior positions managing the foundation's alternative investment portfolio over the next 15 years. During this time, from 2000 to 2009, he was director of Private Equity Investments, managing the foundation's investments in private equity, venture capital, growth equity, distressed investments, and hedge funds. He was appointed to his current post in 2009.

Prior to joining the foundation, Eric practiced corporate finance, mergers and acquisitions, and international law with the New York firm of Paul, Weiss, Rifkind, Wharton & Garrison. He is a member of the World Economic Forum's Committee on the Future of Long-Term Investing and a member of the Finance and Investment Advisory Committee of the International Fellowships Fund. He's also on the board of Makena Capital Management and is a director of Arch Capital Group and a member of its Finance and Investment Committee.

Eric received his undergraduate degree with honors in social science from the University of Chicago; studied international economics at the Walsh School of Foreign Service at Georgetown University; and received a law degree from New York University School of Law, where he was articles editor of the New York University Annual Survey of American Law. He also holds the CFA (chartered financial analyst) designation from the CFA Institute.



**Darren Walker**

**President**

Ford Foundation

Darren Walker is president of the Ford Foundation, an international social justice philanthropy with a \$13 billion endowment and \$600 million in annual grant making. He chaired the philanthropy committee that brought a resolution to the city of Detroit’s historic bankruptcy and is co-founder and chair of the US Impact Investing Alliance.

Before joining Ford, Darren was vice president at the Rockefeller Foundation, overseeing global and domestic programs including the Rebuild New Orleans initiative after Hurricane Katrina. In the 1990s, as COO of the Abyssinian Development Corporation—Harlem’s largest community development organization—he oversaw a comprehensive revitalization strategy, including building over 1,000 units of affordable housing and the first major commercial development in Harlem since the 1960s. Earlier, he had a decade-long career in international law and finance at Cleary Gottlieb Steen & Hamilton and UBS.

Darren co-chairs New York City’s Commission on City Art, Monuments, and Markers, and serves on the Commission on the Future of Rikers Island Correctional Institution and the UN International Labor Organization Commission on the Future of Work. He also serves on the boards of Carnegie Hall, the Smithsonian’s National Museum of African American History and Culture, the National Gallery of Art, Art Bridges, the High Line, VOW to End Child Marriage, the HOW Institute for Society, the Global Steering Group for Impact Investment, and the Committee to Protect Journalists. He is a member of the Council on Foreign Relations and the American Academy of Arts and Sciences, and is the recipient of 13 honorary degrees and university awards, including the W. E. B. Du Bois Medal from Harvard University.

Educated exclusively in public schools, Darren was a member of the first class of Head Start in 1965 and graduated from the University of Texas at Austin, which in 2009 recognized him with its Distinguished Alumnus Award—its highest alumni honor. He has been included on numerous annual media lists, including Time’s annual list of the 100 Most Influential People in the World, Rolling Stone’s 25 People Shaping the Future, Fast Company’s 50 Most Innovative People, and Out magazine’s Power 50.



**Roy Swan**

**Director, Mission Investments**

Ford Foundation

Roy Swan leads the foundation’s Mission Investments team, managing Ford’s portfolio of mission-related investments (MRIs) and program-related investments (PRIs), and working to expand and strengthen the impact investing field.

Before joining Ford, Roy served as managing director and co-head of Global Sustainable Finance at Morgan Stanley. During his time at Morgan Stanley, Global Sustainable Finance committed over \$13 billion in community development transactions. Among his prior experiences, he was the founding chief investment officer of New York City’s Upper Manhattan Empowerment Zone (UMEZ), a federal initiative to bring new resources to distressed urban communities which played a key role in Harlem’s economic rebirth. He also served as CFO at Carver Bancorp, a Harlem-based publicly traded financial institution and the nation’s largest African American managed bank. Over the course of his career, Roy has worked in corporate law at Skadden Arps, investment banking at The First Boston Corporation, Salomon Brothers, and JPMorgan, and finance at Time Warner.

Roy serves on several nonprofit boards, including the Dalton School, Enterprise Community Partners, Low Income Investment Fund, and the Partnership for After School Education. He also serves on the advisory boards of several private equity funds. Roy received a bachelor’s degree from Princeton University and a JD from Stanford Law School, where he was an editor of the Stanford Law Review.



**Tim Recker**

**Chief Investment Officer  
& Treasurer**

The James Irvine Foundation

Tim Recker joined Irvine in November 2016 as the Chief Investment Officer and Treasurer. He directs the Foundation's \$2.4 billion endowment, develops its investment policy and strategy, and is a member of the Foundation's Executive Team.

Prior to Irvine, Tim served for 10 years as the Managing Director of Private Equity and Real Assets for the Regents of the University of California. Previously, he was Director of Alternative Investments for the Michigan Retirement System, where he oversaw a \$13 billion portfolio of Private Equity, Hedge Funds, and Structured Products.

Prior to Michigan, Tim was a portfolio manager for GE Asset Management, running a \$5 billion multi-asset portfolio. He completed the two-year Financial Management Program at General Electric.

Tim is the former Chairperson of the Institutional Limited Partners Association and is also a Chartered Financial Analyst. Living in Piedmont, California, he is a trustee and chairperson of the investment committee for The College Preparatory School, a former trustee and current investment committee member for the Piedmont Community Church and a frequent guest lecturer at UC Berkeley.

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





**Chris Lee\*\* \***

**Head of Real Estate Americas**

KKR

Chris Lee (New York) joined KKR in 2012. He is responsible for KKR's Real Estate business in the Americas, overseeing both equity and credit investing platforms in the region. Mr. Lee serves as Portfolio Manager for KKR Property Partners Americas. He is currently Vice Chairman of the Board of Directors of KKR Real Estate Finance Trust Inc. (NYSE: KREF) where he previously served as Co-Chief Executive Officer and Co-President since October 2015 and March 2016, respectively, through March 2020.

Mr. Lee sits on KKR's Real Estate Equity and Credit Investment Committees in the Americas, KKR's Real Estate Equity and Credit Portfolio Management Committees in the Americas, KKR's ESG Committee, KKR's Global Inclusion and Diversity Council, co-chairs KKR's Americas Inclusion and Diversity Council and chairs KKR's Real Estate Valuation Committee. Prior to joining KKR, he spent three years at Apollo Global Management on their global real estate team where he focused on real estate acquisitions. Mr. Lee also worked at Goldman Sachs in the merchant banking division's real estate principal investment area (REPIA) for over five years after spending two years in the investment banking division. He earned his MBA from Harvard Business School and his Bachelor's degree in Economics from Emory University. Mr. Lee is a former trustee of St. Mark's School of Texas in Dallas, Texas.

He currently serves as a member of the Board of Directors of SEO in New York, New York, as a member of the Board of Directors of the PREA Foundation in Hartford, Connecticut, as a trustee of Collegiate School in New York, New York and as a member of the Dean's Advisory Council for Emory College of Arts and Sciences in Atlanta, Georgia. Mr. Lee is a member of the CRE Finance Council, Pension Real Estate Association, Real Estate Capital Policy Advisory Committee for the Real Estate Roundtable, Real Estate Executive Council, Manhattan Chapter of YPO and Urban Land Institute where he sits on one of its Urban Development and Mixed-Use Councils.



**Kim Y. Lew**

**Chief Executive Officer  
& President**

Columbia Investment  
Management Company

Kim Y. Lew is CEO of Columbia Investment Management Company which manages the endowment of Columbia University in the city of New York. Previously, she was the CIO of Carnegie Corporation of New York, the private grant making foundation founded by Andrew Carnegie in 1911 which she joined from the Ford Foundation. Lew started her career in the middle market banking group of Chemical Bank and following business school joined Prudential Capital Group.

Lew graduated from the Wharton School of the University of Pennsylvania with a B.S in Economics and from the Harvard Graduate School of Business with an MBA. She is a CFA charterholder and has served as both a standard setter and grader.

Lew serves on the Boards of Ariel Investment Management Mutual Funds and Girls Who Invest. She serves on the investment committees of the ACLU and National Gallery of Arts.



**Andrew Fairbairn\***

**Executive Vice President**

SEO

Andrew Fairbairn is the Executive Vice President of SEO, overseeing SEO's five professional programs: Career, Tech Developer, Alternative Investments, Law, and Leadership Institute. Andrew has been involved with SEO for almost three decades, beginning in 1995 as an SEO Career intern for Lehman Brothers, which launched his career in finance, consulting, and executive leadership. In 2000, Andrew co-founded SEO London while on assignment with Deutsche Bank, and after many years on the board of directors, he became the CEO in 2016. Under his tenure at SEO, Andrew oversaw the growth of all SEO London programming. Andrew knows firsthand the power and impact of SEO and believes that SEO is a "powerful vector for hope in our society." Andrew's upbringing has been influential throughout his life and has solidified his focus on racial equity and social justice. Although he was born in Massachusetts, Andrew spent his first 10 years in Jamaica, West Indies, in his mother's hometown. He moved back to the Boston area for middle school and high school. Being mixed race, Andrew is simultaneously an insider and an outsider in many of the conversations on race and differences in our society. Throughout his formative experiences, he saw how systemic factors can be limiting for so many individuals and communities, which solidified his commitment to ensuring opportunity is available to all. Andrew brings an entrepreneurial and cross-industry perspective to his role and is passionate about seeing young people succeed.



**Dakotah Rice\***

**Founder & Chief Executive Officer**

Poolit

Dakotah Rice is the Founder and CEO of Poolit. Prior to founding Poolit Mr. Rice was an investment analyst at Coatue Management covering companies across the internet, media, and telecommunications sectors. Earlier in his career, he worked as an investor at The Carlyle Group and as an investment banker at Goldman Sachs. Mr. Rice graduated from Brown University in 2016 with a Bachelors in Political Science and is currently on a leave of absence from pursuing his Masters in Business Administration at Harvard Business School. He sits on the Board of Directors for BUILD NYC and on the junior boards of both Teach for America New York and Breakthrough Greater Boston.



Emcee

**Pamela Brylski\***

**Head of Family Offices, Endowments & Foundations**

Shenkman Capital

Pamela Brylski heads the family office, endowment and foundation business at Shenkman Capital. She previously served as a leader in the family office, foundation and endowment business at BlackRock. Prior to BlackRock, she was a senior vice president at Morgan Stanley. Previously she served as a vice president in the investment management division of Goldman, Sachs & Co. Prior to joining Goldman Sachs & Co, Pamela practiced as a corporate attorney in New York with global law firms representing private equity firms, hedge funds and international corporations in a variety of domestic and international transactions. She also worked as a transaction advisor for the global private equity firm, The Carlyle Group in Washington, DC. Pamela also served as a White House Intern. Pamela is actively engaged in the community serving a number of philanthropic and educational organizations including as a national board member and the founder and chair of the South Florida chapter for the Women's Association of Venture and Equity (WAVE), global board member of the Hedge Fund Association, term member for the Council on Foreign Relations and a Young Leaders Circle member for the Milken Institute. She is an alumni of the SEO Career program. Pamela has been recognized by the Wall Street Journal - WSJPro as a Women To Watch in Private Equity, Private Equity International as an honoree for their 40 under 40 list, South Florida Business Journal as an honoree of the 40 under 40 list and a 2022 Influential Business Women. She was also recognized by InvestmentNews in 2018 as a Rising Star. She obtained a B.A. in Humanities Honours (Pre-Medicine) from The University of Texas at Austin and her Juris Doctorate from Georgetown University Law Center. She resides in Miami with her husband, her son and her daughter.



**Adebayo Ogunlesi**

**Founding Partner,  
Chairman & Chief  
Executive Officer**

Global Infrastructure  
Partners

Bayo Ogunlesi is a Founding Partner, and the Chairman and Chief Executive Officer of GIP. He is based in New York.

Prior to the formation of GIP in 2006, Mr. Ogunlesi spent 23 years at Credit Suisse, where he held several senior positions including Executive Vice Chairman and Chief Client Officer of the Investment Banking Division. From 2002 to 2004, he was Head of the Global Investment Banking Division and a Member of the Executive Board and Management Committee.

Previously, Mr. Ogunlesi was an attorney with the New York law firm of Cravath, Swaine & Moore. He also served as a Law Clerk to the Honorable Thurgood Marshall, Associate Justice of the United States Supreme Court. He has been a Lecturer at the Harvard and Yale Law Schools and the Yale School of Management where he taught courses on Transnational Investment Projects.

Mr. Ogunlesi holds a B.A. (First Class Honors) in Politics, Philosophy and Economics from Oxford University, a J.D. (magna cum laude) from Harvard Law School and an M.B.A. from Harvard Business School. He is the Lead Director of Goldman Sachs Group, Inc. and a member of the Boards of Directors of Callaway Golf Company, Kosmos Energy Holdings, Terminal Investment Limited and Freeport LNG. He is a Member of the Dean's Advisory Boards of the Harvard Law and Business Schools and the Harvard University Global Advisory Council.



**Ramsey Smith\*\* \***

**Founder**

ALEX.fyi

**Moderator – Breakout Panel: The Growing Importance of Alternative Investments for Life Insurance Companies**

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

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

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

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

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



**Juliya Chekmarova**

**Managing Director**

Ardea Partners

**Panelist – Breakout Panel: The Growing Importance of Alternative Investments for Life Insurance Companies**

Juliya Chekmarova is a Managing Director at Ardea Partners focusing on the insurance sector in North America. With a particular focus on insurance carriers, Juliya has led the Ardea team on many of the recent transactions at the center of the convergence between insurance and alternative asset management. Some of these transactions include Blackstone’s investment in Resolution Life, the reinsurance of Allianz U.S. Life FIA portfolio consisting of \$35bn of reserves to Sixth Street and Resolution Life, the sale of Allstate Life Insurance Company to Blackstone and the successful defense of American Equity Life against an unsolicited proposal from Prosperity Life.

Prior to Ardea, Juliya worked at Goldman, Sachs & Co from 2012 through 2017 as a Vice President in the Financial Institutions Group, Investment Banking. Prior to that, she worked in the Financial Institutions Group, Investment Banking at Credit Suisse. Juliya earned a BA from Barnard College, Columbia University.



**Scott Jeffreys**

**Director, Insurance and Strategic Finance**

KKR

**Panelist – Breakout Panel: The Growing Importance of Alternative Investments for Life Insurance Companies**

Scott Jeffreys (New York) joined KKR in 2021 and is a member of the KKR Insurance team, where he focuses on insurance strategy and analytics in support of KKR's insurance company asset management clients. Prior to joining KKR, Mr. Jeffreys spent three years at Macquarie Group Ltd. where he was a senior strategist tasked with building out Macquarie's insurance platform. Previously, Mr. Jeffreys spent eleven years at BlackRock with senior responsibility for the design, development and execution of all relevant insurance strategy and advisory initiatives. Mr. Jeffreys holds a B.A. from Cornell University.





**Craig Sabal**

**Deputy Chief  
Investment Officer**

New York Life  
Insurance Company

**Panelist – Breakout Panel: The Growing Importance of Alternative Investments for Life Insurance Companies**

Craig Sabal is Senior Vice President and Deputy Chief Investment Officer of New York Life. He is responsible for the day-to-day management of the Office of the Chief Investment Officer, which oversees portfolio strategy and management for the General Account investment portfolio. Prior to joining New York Life, Mr. Sabal was the Deputy Chief Investment Officer at AIG responsible for strategic asset allocation and tactical investment decisions for the global Life & Retirement and Property & Casualty operating businesses. Mr. Sabal has more than 25 years of financial consulting leadership experience in strategic portfolio and risk management transactions across fixed income and equity markets to insurance companies. He served as Managing Director – Head of Insurance and Credit Solutions Group for Goldman Sachs, and previously held senior financial and consulting positions for several investment bank and accounting firms.

Mr. Sabal earned his B.S. degree in accounting from Rutgers University. He holds the Chartered Financial Analyst designation and is a licensed Certified Public Accountant



**Kelly A. Saltzgaber**

**Executive Vice President &  
Chief Investment Officer**

Genworth Financial

**Panelist – Breakout Panel: The Growing Importance of Alternative Investments for Life Insurance Companies**

Kelly Saltzgaber has been our Executive Vice President and Chief Investment Officer since March 1, 2023. She previously served as the Head of the Portfolio Management team from January 2018 to March 2023, having been Interim Head since mid-2017 after moving to Portfolio Management in November 2016, and as a Senior Credit Trader from 2013 to 2016. Prior to joining the Company in 2013, Ms. Saltzgaber had 27 years of combined experience in Institutional Credit Sales at Goldman Sachs, Barclays and Cambridge International and as an analyst in the Asset-Backed Securities group at Merrill Lynch. Ms. Saltzgaber received a B.A. in Economics Modified with Mathematics from Dartmouth College and an M.B.A. in Finance from New York University's Stern School of Business.



**Elizabeth Browne**

**Managing Director**

GCM Grosvenor

**Moderator – Breakout Panel: GP Stakes**

Ms. Browne is co-head of the Elevate strategy as part of the Sponsor Solutions Business. In addition, she works on various strategic investing initiatives across the firm. Prior to joining GCM Grosvenor, Ms. Browne worked at RedBird Capital Partners, where she focused on investing in family and founder-led businesses, including transaction sourcing, company-building, capital raising, and co-investments. Before joining RedBird, she was a senior member of the investment team and head of business development for DNS Capital, a prominent Midwest family office, where she focused on investing in venture and private equity transactions across a range of industries and sectors. Earlier in her career, she held roles at Goldman Sachs, Simpson Thacher & Bartlett, and The Chicago Council on Global Affairs. Ms. Browne earned a BA in Sociology with Great Distinction from McGill University and an MBA in Finance and International Business from the Kellogg School of Management at Northwestern University. She sits on the Midwest steering committee for the Women's Association of Venture & Equity (WAVE); is a member of the Private Equity Women Investor Network (PEWIN) and The Chicago Network; and founded the Chicago Women: Lift & Lead citywide interview series, in partnership with Chicago Scholars.



**Sarah Davidoff**

**Partner**

Ropes & Gray

**Panelist – Breakout Panel: GP Stakes**

Sarah Davidoff is a partner in Ropes & Gray's market-leading asset management group and co-leader of the firm's growth equity and venture funds team. For more than 25 years, she has counseled the world's largest and most prominent global alternative asset managers on all aspects of raising and operating private funds, as well as asset management M&A. Sarah is particularly known for her ability to serve as a strategic thought partner, helping clients launch novel hybrid, growth equity, buyout, credit and venture capital funds. She also regularly represents clients in GP-led transactions and strategic M&A. A pioneer, Sarah helped launch one of the first hybrid funds a decade and a half ago. Since then, she has continued to partner with clients to develop innovative funds and navigate a complex and evolving regulatory and compliance landscape. Sarah has received numerous accolades for her work on behalf of clients. Clients value Sarah's creativity in coming up with solutions that support their economic goals and liquidity profiles, as well as her deep understanding of investor negotiation dynamics. Feedback in Chambers USA also highlights that she is "a good counselor, crisis manager and solution-oriented lawyer." Sarah is very involved with the broader private funds community and speaks frequently at conferences, forums and seminars. She is also deeply committed to giving back through community service. Sarah serves on the boards of arts nonprofit A BroaderWay and the NYU Law Alumni Association, and volunteers with Food Bank For New York City.



**Shohana Jannat\***

**Managing Director**

Ardea Partners

**Panelist – Breakout Panel: GP Stakes**

Shohana Jannat is a Managing Director at Ardea Partners, where she is dedicated to strategic and M&A advisory involving private markets and alternative investment managers. Over her nearly 15 year career, Ms. Jannat has established strong relationships with asset managers, insurance companies, staking specialists, banks and financial sponsors. Prior to joining Ardea, Ms. Jannat was dedicated to the coverage of private markets and alternative investment managers in the investment banking group at Piper Sandler. Previously, Ms. Jannat was an investment banker in the financial institutions groups at Oppenheimer & Co. and Wells Fargo Securities. Ms. Jannat has originated and executed over 70 M&A advisory and capital markets transactions representing over \$45 billion in combined transaction value. Ms. Jannat graduated from Bentley University with a BS in Finance, with Honors.



**Yup S. Kim**

**Investment Director**

CalPERS Private Equity

**Panelist – Breakout Panel: GP Stakes**

Yup S. Kim serves as an investment director for private equity at CalPERS, California’s \$450 billion pension fund. He serves on the private equity investment review committee and helps lead CalPERS’ private equity program across all functions, including strategy, team management, and investment activities across primary, secondary, and co-investment opportunities globally. Previously, he served as the senior portfolio manager at the Alaska Permanent Fund Corporation, an \$80 billion sovereign wealth fund, where he helped lead private investment activities. The private equity and special opportunities portfolio generated 25% net of fee returns over the past decade. He has also held positions at DB Private Equity, where he served on the Investment Committee, Performance Equity, and Silver Point Capital, and he began his career at Citigroup in New York. Kim received his B.A. in economics from Yale University and speaks six languages.



**Sean Ward**  
**Senior Managing Director**  
 Blue Owl Capital

**Panelist – Breakout Panel: GP Stakes**

Sean Ward is a Senior Managing Director of Blue Owl Capital Inc., a member of the firm’s Executive Committee and a member of the firm’s board of directors. Mr. Ward also serves as a member of the Dyal Capital Partners Investment Team. Previously a Vice President at Lehman Brothers, Mr. Ward held several roles at Neuberger after it became an independent firm, including Senior Counsel for Neuberger’s alternatives business. Prior to joining Lehman Brothers, he was an associate at Covington & Burling LLP, where his practice focused on mergers and acquisitions, public and private securities offerings and credit transactions. Prior to Covington & Burling LLP, Mr. Ward worked at Davis Polk & Wardwell LLP in New York and London.

Mr. Ward received his J.D., magna cum laude, from the Duke University School of Law and holds a B.A., magna cum laude, in Diplomatic History and Political Science from the University of Pennsylvania. He currently serves on the Leadership Council of Robert F. Kennedy Human Rights, a nonprofit focused on human rights issues and a “social good” approach to business and investment. Mr. Ward is also a member of the Board of Trustees of the Brooklyn Museum.



**Mark Sutterlin**  
**Head of Hedge Fund  
 Origination & Product  
 Management**  
 Bank of America

**Moderator – Breakout Panel: Hedge Fund**

Mark Sutterlin is the head of Hedge Fund Origination team that serves wealth management clients at Bank of America. Based in New York, his team is responsible for sourcing, structuring, negotiating, and managing hedge fund solutions for wealth management clients. The Hedge Fund Origination Team is part of the Alternative Investments Group within Investment Solutions Group (ISG).

Prior to his role within ISG, Mark began his career at Merrill Lynch as an Investor Services Advisor within Merrill Edge, providing financial guidance to wealth management clients.

Mark holds a Bachelor of Science in Economics from University of Michigan and is a CFA Charterholder.



**Keith Friedman**

**Managing Director**

GCM Grosvenor

**Panelist – Breakout Panel: Hedge Fund**

Mr. Friedman serves as a Portfolio Manager for a number of multi-strategy portfolios and for other specialized strategies and custom mandates. Mr. Friedman leads activities related to the construction, implementation, and ongoing management of portfolios. Prior to becoming a Portfolio Manager, Mr. Friedman was a member of the Research Team and shared responsibilities for investment research and manager due diligence across a range of strategies. Prior to joining GCM Grosvenor, Mr. Friedman was the Director of Alternatives Research and Quantitative Analysis at Iron Financial and Iron Partners, a fund of hedge funds. At Iron Financial and Iron Partners, Mr. Friedman managed the investment research analyst team that focused on hedge fund manager due diligence. Mr. Friedman received his Bachelor of Arts in Finance from the University of Illinois at Urbana-Champaign and his Master of Business Administration from the University of Chicago Booth School of Business, with concentrations in Finance, Economics, Accounting, and Econometrics & Statistics.



**Dennis Jean-Jacques**

**Founder & Chief  
Investment Officer**

Ocean Park Investments

**Panelist – Breakout Panel: Hedge Fund**

J.Dennis Jean-Jacques serves as Founder and Chief Investment Officer at Ocean Park Investments LP. He is an accomplished and seasoned investor having invested approximately more than \$3.2 billion of client capital in the US and European public markets during various market cycles over 20 years. For a decade, prior to Ocean Park, Mr. Jean-Jacques was a Managing Director and portfolio manager at alternative platforms including Verition Fund. Prior to running low net, alternative strategies, Mr. Jean-Jacques was an investor in the Public Equities Division at Olayan Investment Group and apprenticed at Mutual Shares focusing on companies undergoing or likely to undergo significant change, dislocations and other unique special situations with a strategy and asset mix consisting of domestic and foreign equities, arbitrage positions, shareholder activism and bankruptcy positions. For ten years, Mr. Jean-Jacques served as a board advisor and as an actively engaged shareholder in several campaigns including in the operational restructuring of a global industrial company, the outright sale of an American appliance manufacturer, and, at the boardroom level, helped lead the break-up of an S&P 500 conglomerate where his work was profiled in BARRON's, Business Week and The Wall Street Journal. Mr. Jean-Jacques is also an author on portfolio construction, valuation and risk management where his published work, "The Five Keys to Value Investing" is used at many universities and has been translated into three languages including Mandarin Chinese. He began his investment career at Fidelity Investments in equity research in 1993. Mr. Jean-Jacques received a BSSE from Boston University College of Engineering and an MBA from Harvard Business School.





**Priya Kaftan**

**Head of Investor Relations  
& Product Strategy**

Heard Capital

**Panelist – Breakout Panel: Hedge Fund**

Priya Kaftan is the Head of Investor Relations and Product Strategy at Heard Capital LLC, where she oversees client relations, client communications, business development and product strategy.

Prior to joining Heard Capital LLC in 2019, Ms. Kaftan was a Senior Associate at Silver Point Capital, L.P., a credit and distressed focused hedge fund. In that role, Ms. Kaftan was responsible for relationships management with existing and prospective investors, client communications, reporting and analytics and product strategy.

Prior to Silver Point Capital, L.P., Ms. Kaftan was a Vice President in J.P. Morgan's Syndicated and Leveraged Finance group. In that role, she structured leveraged loan and high yield transactions for clients in the energy, metals, mining, packaging and chemical sectors. Ms. Kaftan also served as an Analyst and Associate in the Syndicated and Leveraged Finance group.

She began her career as an analyst in J.P. Morgan's Natural Resources industry coverage group where she worked on merger and acquisitions, restructurings and corporate financing transactions for companies in the mining and metals industries.

Ms. Kaftan holds an MBA from Columbia Business School and a Bachelor of Science in Business Administration from Boston University where she was a magna cum laude graduate. She is a Board Member of Ten Thousand Villages Oak Park, an organization focused on fair trade and economic empowerment, co-head of the Allocators Committee for Global FundWomen Week, and serves on the Chicago Committee of 100 Women in Finance and the Sponsorship Committee of Women Investment Professionals.



**Andy McElaney**

**Partner**

The Baupost Group

**Panelist – Breakout Panel: Hedge Fund**

Andy joined Baupost in 2019 and focuses on a broad range of event-driven and special situation opportunities. Prior to joining Baupost, he worked at Highfields Capital for more than a decade, where he was a Partner focusing on public equity investing in industrials, materials and event-driven situations. Before his time at Highfields, Andy was an Associate at private equity firm Great Hill Partners and an Investment Banking Analyst at Lehman Brothers. He graduated from Dartmouth College with a B.A. in Economics and History and earned his MBA from Harvard Business School. Andy is involved with several local nonprofit organizations and serves as a Trustee of The Roxbury Latin School and Derby Academy. He is also actively involved with coaching youth sports programs in Hingham, MA.



**Robert Holley\***

**Senior Investment Officer**

Baltimore Fire & Police  
Employees' Retirement System

### Moderator – Breakout Panel: Private Equity

Robert Holley is a 20 year veteran in the investment industry, with a background in fixed income, equities, alternatives, and futures/commodities. He currently serves as Investment Systems Advisor for the \$3.1 billion Baltimore City Fire & Police Employees Retirement System. Prior to his work in Baltimore, he headed the \$2.0 billion Prince George's County Pension Plan, and before that was portfolio manager for the Office of the Illinois State Treasurer. From 2001-2014, Robert worked in New York and Chicago, holding several positions with Citigroup Global Markets, Inc. within their Institutional Clients Group (ICG). A graduate of Stanford University, Robert completed his degree in 2001 with a focus on public policy. During his undergraduate studies, he participated in a transfer internship program working for the House of Representatives Budget Committee in Washington, DC. Following that, he began a summer internship with Salomon Smith Barney in New York through the Sponsors for Educational Opportunity (SEO) program. Robert is a champion for workforce diversity. He regularly participates in fundraising and hosting networking events for the Sponsor's for Educational Opportunity (SEO). From 2003-2008 he served as Citigroup's firm captain for the SEO program. He is also an active member of the National Association of Securities Professionals (NASP) and involved in programming and initiatives for the National Association of Investment Companies (NAIC). Robert currently resides in Adelphi, Maryland, with his two sons (Quinton and Malcolm). He enjoys coaching youth baseball, supporting local sports teams, and traveling.



**Heather Faust**

**Managing Partner  
& Co-Founder**

Argand Partners

### Panelist – Breakout Panel: Private Equity

Heather Faust is a Managing Partner and Co-Founder of Argand as well as a member of the Management Committee and Investment Committee. Previously she was a Managing Director at Castle Harlan. Prior to joining Castle Harlan, Heather was a management consultant at McKinsey & Company, where she worked in the United States and abroad across a variety of industries. Heather advised and directly assisted her clients in defining and implementing key strategic and operational business transformations. Heather's experience also includes roles in the consumer industry as well as international development work in the Middle East. Heather graduated cum laude from Princeton University with a B.S.E. in Operations Research and Financial Engineering and holds an M.B.A. from the Harvard Business School.

Heather is a Director of Cherry (FRA:C3RY), Concrete Pumping Holdings, Inc. (NASDAQ: BBCP), OASE (Chairperson), Midwest Can Company (Chairperson), Sigma Electric, and Tensar Corporation. She previously served as a Director of Industrea Acquisition Corp. (NASDAQ: INDU), Baker & Taylor, IDQ Holdings, Inc. and Ames True Temper.



**Joseph Haslip**

**Managing Director**

Valor Equity Partners

**Panelist – Breakout Panel: Private Equity**

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.



**Jennifer Hoh**

**Managing Director**

Providence Equity Partners

**Panelist – Breakout Panel: Private Equity**

Jennifer Hoh is a managing director on Providence’s investment team based in our New York office. She is a member of the firm’s ESG committee and the Providence Women’s Roundtable. Ms. Hoh is currently a director of 365 Retail Markets and Worldwide Express. Prior to joining Providence in 2014, Ms. Hoh was with Bain Capital, where she evaluated investments and supported portfolio companies across sectors. Previous to that, she worked at Bain & Company as a strategy consultant. Ms. Hoh holds a Master of Business Administration from Harvard Business School and a Bachelor of Arts from Dartmouth College.



**Avi Oler**

**Managing Director & Chief Legal Officer**

Digital Alpha Advisors

**Panelist – Breakout Panel: Private Equity**

Abraham (Avi) Oler, CFA is Digital Alpha’s Managing Director and Chief Legal Officer. Avi has been an advisor to Digital Alpha and its portfolio companies since inception and has known the Managing Partner for more than two decades. Avi was previously a corporate attorney with Kirkland & Ellis LLP, where he concentrated his practice on the structuring, formation, and operations of private equity funds. Most recently, Avi led the legal function of two publicly listed companies, where he also led the corporate development function and managed licensing, M&A, and financing transactions. Earlier in his career, Avi was a financial research analyst at the Center for Financial Research & Analysis, and an investment banker in the Financial Institutions Group with Lehman Brothers in London. Avi earned his J.D. and MBA degrees with distinction from Northwestern University School of Law and the Kellogg School of Management. He earned an M.Sc. in Politics of the World Economy from the London School of Economics and Political Science, a B.S. in Economics and a B.A. in International Relations magna cum laude from the University of Pennsylvania and the Wharton School.


**Gerald Cooper**
**Partner**

Campbell Lutyens

**Moderator – Breakout Panel: Secondaries**

During his time with Campbell Lutyens, he has built the North America secondaries team to become one of the largest and most respected in the industry. He has also led a number of major secondary mandates for blue chip US institutional investors as well as for leading GPs on the creation of continuation funds. Gerald has advised on over \$30 billion worth of secondary transactions including both LP focused and GP-led mandates.

Prior to joining Campbell Lutyens, Gerald spent 12 years at UBS advising on secondary transactions, most recently as Global Co-head of Secondary Advisory in the Private Funds Group in New York. Before specializing in the secondary market, Gerald worked at Advantage Capital Partners focusing on direct investments in the Midwest and Southeast parts of the US, having previously worked in corporate finance and equity capital markets at Deutsche Bank and Bankers Trust Company in New York and Hong Kong.

Gerald graduated magna cum laude from Bryant University with a Bachelor of Science Degree in Business Administration and earned his MBA from Harvard Business School.


**Rikesh Mohandoss**
**Partner**

Glendower Capital

**Panelist – Breakout Panel: Secondaries**

Rikesh is a Partner of Glendower Capital responsible for the origination, valuation, execution, and monitoring of secondary investments in North America. Prior to Glendower, Rikesh spent eight years at Deutsche Bank, joining the SOF Program in its asset management division in North America in 2012. Rikesh joined Deutsche Bank in 2009, working as an Associate in Global Corporate Finance focusing on TMT advisory. From 2004 to 2007, Rikesh was an Assistant Vice President in Credit Risk Management at Bank of America and began his career in 2003 as an analyst at the Federal Home Loan Mortgage Corporation (Freddie Mac) in 2003.

Rikesh holds a BBA in Finance from The George Washington University and an MBA from Columbia Business School.



**Trey Muldrow**

**Partner**

Weil, Gotshal & Manges

**Panelist – Breakout Panel: Secondaries**

Trey Muldrow is a partner in Weil’s Private Equity practice and is based in New York. Trey’s practice focuses on advising private equity firms, portfolio companies, sovereign wealth groups and private and public companies on market-leading transactions, including mergers, acquisitions, divestitures, joint ventures, carve outs and other complex transactions. Trey also regularly represents intermediaries, buyers and sellers in asset manager mergers and acquisitions and complex GP-led single and multi-asset transactions. Prior to joining Weil, Trey was the partner in charge of the New York office of another international law firm and a member of its global Corporate Steering Committee.

Trey is recognized as a “Highly Regarded” lawyer for Private Equity in the U.S. by IFLR1000 and has been recommended for M&A by Legal 500 US. Trey was identified by Crain’s New York Business in its inaugural class of Notable Diverse Leaders in Law 2022. He was previously named Private Practice Leader of the Year by the Metropolitan Black Bar Association and named among the CUP Catalysts: Change Agents in the area of law by the Council of Urban Professionals. Trey actively lectures on various topics relating to private equity matters, including for organizations and publications such as Practising Law Institute, the New York City Bar Association, Buyouts, Private Equity International and Secondaries Investor.



**Josh Nabatian**

**Partner**

Arcadia Investment Partners

**Panelist – Breakout Panel: Secondaries**

Mr. Nabatian is a Partner of Arcadia Investment Partners, which he joined in 2007. Mr. Nabatian is a member of the board of directors of Arcadia portfolio companies Serena & Lily and Prime Architecture and Engineering; he is also on the board of advisors for Phoenician Resources and Terravet. In addition, Mr. Nabatian is an advisor to the Luka Shai Foundation, an organization supporting research for rare diseases. Prior to Arcadia, Mr. Nabatian started his career with Goldman Sachs, where he was a member of the Principal Funding and Investments team. Mr. Nabatian graduated summa cum laude from the Wharton School of the University of Pennsylvania.



**Simon Oak**

**Principal**

Lexington Partners

**Panelist – Breakout Panel: Secondaries**

Simon Oak is a Principal of Lexington Partners primarily engaged in the evaluation of secondary purchases of private equity and alternative investments.

Prior to rejoining Lexington in 2010, Mr. Oak was an associate in Lexington's equity co-investment program and prior to that he was an analyst in investment banking at Credit Suisse.

Mr. Oak graduated from McGill University with a BCom in finance and from the Wharton School of the University of Pennsylvania with an MBA.



**Miguel Silva**

**Investment Officer**

CalPERS

**Moderator – Attracting Capital as an Emerging Manager**

Miguel Silva joined CalPERS in May of 2013 and serves as an Investment Officer in the Sustainable Investing asset class. Mr. Silva is focused on emerging and diverse manager program initiatives across multiple asset classes. In addition, he serves as a liaison between the Investment Office and interested stakeholders and advocacy groups, and collaborates on diversity initiatives.

Mr. Silva began his investment executive career in 2002 as an asset advisor and subsequently served as an Associate Director with Marcus & Millichap Investment Services. During this time, Miguel began his own entrepreneurial efforts raising capital and syndicating multiple real estate partnerships. Focused on expanding his overall advisory capacity, Mr. Silva transitioned to financial services in 2010 with Wells Fargo Advisors and subsequently with J.P. Morgan Securities prior to joining CalPERS.

Miguel is first generation Portuguese and is fluent in Portuguese and Spanish. He was born and raised in San Diego, California and graduated from the University of California at Davis. Originally, Miguel began a career in public affairs, working on several statewide campaigns and serving as a Deputy Press Secretary prior to his investment career.





**Gabriel de Alba**

**Founder  
& Managing Partner**

GDA Luma

**Panelist – Attracting Capital as an Emerging Manager**

Gabriel de Alba is the Co-Founder & Managing Partner of GDA Luma Special Opportunities Fund. Mr. de Alba has more than 25 years of investing experience, operating and leading corporate boards. He specializes in control and/or influence of investments in distressed and undervalued situations; formulating a strategy around recapitalization, cash flow generation, and ESG/digital transformation. He focuses on technology, hospitality, pharma/healthcare, media, telecom and consumer discretionary sectors. Additionally, Mr. de Alba has raised five funds and managed over \$6 billion worth of assets. His new fund started investing in the second half of 2021 and has four investments that are outperforming, having already delivered a 1.41x MOIC and 130% IRR as of December 2021.

He serves as Chairman of Cirque du Soleil, executive chairman of Gateway Casinos & Entertainment Limited and chairman of Frontera Energy Corporation. He also recently served as chairman of Geneva Properties, chairman and CEO of Cable Satisfaction International Inc. / Cabovisão, and director of World Color.

Mr. de Alba is the recipient of the 2020 Leadership Achievement Award and 2018 Global Private Equity Growth Dealmaker of the Year in the Leadership Achievement Category. He is fluent in five languages, hold a double B.S. in Finance and Economics from NYU Stern, an MBA from Columbia University and has completed graduate courses in Mathematics and Computer Science at Harvard University.



**André Rice**

**President**

Muller & Monroe  
Asset Management

**Panelist – Attracting Capital as an Emerging Manager**

André Rice is the President of Muller & Monroe Asset Management, LLC (M<sup>2</sup>), which he founded in 1999. M<sup>2</sup> is a private equity firm that invests exclusively in small and emerging lower middle market managers. M<sup>2</sup> manages \$1.3B for some of the largest public pension plans in the country. André is responsible for general management of the firm, client service, business development, and serves as chairman of the investment committee.

André created Rice Group Ltd (RGL) in 1986 to identify and organize special investment opportunities for wealthy individuals. RGL organized several successful investment partnerships and provided select investment banking services to the world's largest commodities trading firm. RGL serves as the Managing Member of M<sup>2</sup>.

Immediately prior to founding RGL, André was a Senior Project Manager in the Mergers and Acquisitions Department at Kraft Foods Inc. He 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 earned his M.B.A. degree from the University of Chicago Graduate School of Business following a B.S. degree in accounting from South Carolina State University. He is a CPA.

André is an independent board member of CNA Financial Corporation serving on their audit, compensation, and finance committees, and more recently he has joined the board of New America Alliance (NAA). He is also a member of both the National Association of Investment Companies (NAIO) and the National Association of Securities Professionals (NASP), serves as a member of Prevent Child Abuse America's leadership council, 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, including the Chicago Cook Workforce Investment Board, Chicago Metropolitan Agency for Planning, Metropolitan Pier & Exposition Authority, and the Regional Transportation Authority.



**Bharath Srikrishnan**

**Founder  
& Managing Partner**

BharCap Partners

**Panelist – Attracting Capital as an Emerging Manager**

Mr. Srikrishnan is the Founder and Managing Partner of BharCap. He represents BharCap as a board director of Clarus Capital, Sculptor Capital Management and TRIA Capital Partners.

Prior to BharCap, Mr. Srikrishnan spent six 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. 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 more than 20 years of financial services investment, operating and advisory experience. Before joining Pine Brook, he was a Managing Director at Five Mile Capital Partners, where he was responsible for leading the firm’s financial services investment activities. Mr. Srikrishnan previously was a Principal of Lee Equity Partners, where he focused on making financial services private equity investments. Additionally, he was a Co-founder and Managing Director of NewStar Financial, Inc., a private equity backed middle market commercial finance company that successfully completed an initial public offering.

Mr. Srikrishnan began his career as an analyst in the Financial Institutions Group of Salomon Smith Barney and as an associate with Capital Z Financial Services Partners. Mr. Srikrishnan holds a B.S. from Boston College in Finance, Operations and Strategic Management (cum laude). Mr. Srikrishnan also serves as a board director of the USA Wrestling Foundation and the YMCA of Greenwich.



**Eric Taylor**

**Founder, Chief Executive  
Officer & Chief  
Investment Officer**

Trident

**Panelist – Attracting Capital as an Emerging Manager**

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.



**Mandy Pan**

**Vice President**

J.P. Morgan Alternative  
Asset Management

**Moderator – Breakout Panel: Credit**

Ms. Pan is a vice president with J.P. Morgan Alternative Asset Management Hedge Fund & Alternative Credit Solutions and is responsible for investment analysis, research, and due diligence with a focus in Private Credit strategy. Prior to joining JPMAAM in 2019, Ms. Pan worked as a credit research AVP at Barclays with coverage of IG US banks and finance companies. Prior to that role, she was in the Performance & Attribution group at BlackRock. Ms. Pan earned a B.S. in Finance and Accounting from Drexel University and an MBA from Cornell University. Ms. Pan holds the Chartered Financial Analyst® (CFA) designation.



**Andre A. Hakkak**

**Chief Executive Officer  
& Co-Founder**

White Oak Global Advisors

**Panelist – Breakout Panel: Credit**

Mr. Hakkak has served as co-portfolio manager and Investment Committee member of White Oak since 2007. Mr. Hakkak was previously the Founder and Chief Investment Officer of Alpine Global, Inc., a multi-strategy investment management firm which focused on alternative fixed income and real estate investments. Mr. Hakkak was also the Founder and Portfolio Manager at Suisse Global Investments, an investment management firm that developed investment strategies customized to meet the risk-adjusted return requirements of bank and insurance clients in over 30 countries. He previously served at Robertson Stephens & Co. as an Investment Banker and Principal in its Investment Company Act platform. Mr. Hakkak has been a co-founder and board member of several institutional platforms that facilitate the distribution of structured investment products, and has served as a limited partner, general partner or board member of various investment funds and companies. Mr. Hakkak received a B.S. in Finance and Marketing from the Haas School of Business at the University of California at Berkeley and has held Series 7, 63, and 24 designations from FINRA since 1991.



**Milwood Hobbs, Jr.**

**Managing Director &  
Head of North American  
Sourcing & Origination**

Oaktree Capital  
Management

**Panelist – Breakout Panel: Credit**

Mr. Hobbs leads Oaktree’s North American Sourcing and Origination (S&O) group, which focuses on private credit sourcing and deal-origination for the firm’s U.S. Private Debt, Strategic Credit, Special Situations and Distressed Debt investment teams. Previously, he sourced and originated private debt opportunities across Oaktree’s credit strategies. Prior to joining Oaktree in 2013, Mr. Hobbs was an executive director at Natixis Securities focused on building the high yield sales and trading franchise. Prior thereto, he spent five years at Goldman Sachs as a vice president in leveraged finance origination and sales. Before joining Goldman Sachs in 2007, Mr. Hobbs was a director in Leveraged Finance at Deutsche Bank Securities, which he joined in 2000. Additional experience includes regional account management focused on fleet financing at GE Capital Corporation and controller for Leveraged Finance at Bank of America. Mr. Hobbs received his M.B.A. from Columbia Business School and a B.S. degree in accounting from Rutgers University.



**Robert Galeano**

**Head of Investor Relations**

Standard General

**Panelist – Breakout Panel: Credit**

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.

**Frank Cross**

**Managing Director**

Brightwood Capital  
Advisors

**Panelist – Breakout Panel: Credit**

Frank Cross is a Managing Director at Brightwood. Prior to joining Brightwood, Mr. Cross was a Director in the Healthcare investment banking group at RBC Capital Markets and, prior to that, held a similar role at Wells Fargo Securities. Previously, Mr. Cross worked in the Credit Opportunities fund at UBS O'Connor and at Castle Harlan, a middle-market private equity fund. Mr. Cross started his career as an analyst in the Mergers & Acquisitions group at Credit Suisse.

Education: Mr. Cross earned his B.A. in economics from Yale University.



**Jon Smith**

**Vice President**

645 Ventures

**Moderator – Breakout Panel: Venture Capital**

Jon Smith is a Vice President on 645 Ventures' Investment & Research team. He partners with new and existing portfolio founders across healthcare, proptech, fintech, and web3.

It was through Jon's professional experiences that he uncovered his deep passion for technology and entrepreneurship. Jon was a founding member of Nickson Living and previously served on an investment team at Goldman Sachs.

In his free time, you can find Jon flying down any scenic bike trail or fervently searching AllTrails for the best hikes in the area. As a former collegiate athlete, he relives his glory days through pickup sports games around San Francisco.

Jon received his B.A. from the College of the Holy Cross and his MBA from Harvard Business School.





**David R. Jones**

**Co-Founder, President  
& Chief Executive Officer**

CastleOak Securities

**Panelist – Breakout Panel: Venture Capital**

David R. Jones is the Co-Founder, President and Chief Executive Officer of CastleOak Securities, L.P. CastleOak Securities is a leading boutique investment bank with a broad offering of financial services including equity sales and trading, fixed income sales and trading, and financial advisory services.

Since founding CastleOak Securities in 2006, Mr. Jones has overseen the substantial growth of both the firm’s business activities and personnel. Mr. Jones has led the firm as it increased its underwriting, distribution, and trading in a full range of securities while expanding its footprint to 6 offices across the United States. Under Mr. Jones’ leadership, CastleOak quickly became, and has consistently stayed, a top-ranked Minority and Women-Owned (MWOB) firm in lead-managed domestic agency, investment grade corporate, and structured finance underwritings, as listed by Bloomberg and Thomson Reuters.

Mr. Jones has over 20 years of Wall Street experience, and prior to founding CastleOak was Head of Investment Banking and Capital Markets at Blaylock & Company, Inc. where he worked closely with many of the firm's Fortune 500 clients. Mr. Jones joined Blaylock from Merrill Lynch where he worked in the firm’s investment banking and equity capital markets areas. Mr. Jones has significant experience in evaluating equity and debt market trends within industry sectors, valuing and positioning public companies, and marketing and syndicating public security offerings to institutional clients.

Mr. Jones holds an MBA from the University of Pennsylvania, The Wharton School and a B.S. from Boston University. He is a member of The Ohio National Financial Services, Inc. Board of Directors, The Wharton School Graduate Executive Board, The New Jersey Performing Arts Center Board of Directors, a member of The New York Chapter World Presidents' Organization, The Board of Overseers of Boston University (2012-2019), The Executive Leadership Council, the National Association of Securities Professionals, and is a Trustee for the PGA REACH Foundation. Mr. Jones was named as one of the 75 Most Powerful Blacks on Wall Street by Black Enterprise Magazine.



**Thomas V. Kennedy**  
**Chief Investment Strategist**  
J.P. Morgan

### Panelist – Breakout Panel: Venture Capital

Thomas Kennedy is the Chief Investment Strategist for Global Wealth Management at J.P. Morgan. In this role, he leads the development of Wealth Management’s global economic and investment views, while serving as the chair of the Global Investment Strategy Group. Mr. Kennedy advises high net worth clients on asset allocation within the context of their overall investment portfolios including tactical brokerage ideas and long term discretionary solutions

Previously, Mr. Kennedy worked at the Federal Reserve Bank of New York for 8 years holding various research and policy positions. Most recently, he led a global macro strategy team, responsible for researching global financial markets and briefing senior Federal Reserve officials in New York and Washington D.C. He also served as a speech writer for the portfolio manager of SOMA (System Open Market Account Holdings), regularly crafting his remarks on financial markets delivered at the start of every FOMC meeting.

In addition to his investment strategy responsibilities, Mr. Kennedy is an Adjunct Professor of Economics and Finance at Long Island University in New York.

Mr. Kennedy received an M.B.A. from American University’s Kogod School of Business and a B.A. from Lafayette College. He currently lives on Long Island with his wife and three kids.



**Marcus Lindroos**  
**Principal, Primary Investments**  
Adams Street Partners

### Panelist – Breakout Panel: Venture Capital

Marcus supports the Primary Investment Team in all aspects of the investment decision-making process, including business due diligence, industry review, document negotiation, and portfolio management.

Prior to joining Adams Street, he worked at Raymond James & Associates, Inc., as an Investment Banking Analyst within their General Industrials Group.

Marcus is a member of Adams Street’s Diversity, Equity & Inclusion Committee.



**Anouk Van Der Boor**

**Managing Director, Private Partnerships**

The Rockefeller University

**Panelist – Breakout Panel: Venture Capital**

Anouk van der Boor is Managing Director of Private Investments at The Rockefeller University in New York. She joined The Rockefeller University in 2022 after 17 years at Cambridge Associate, including as a Partner since 2016. At Cambridge Associates, Anouk managed more than 30 discretionary and advisory client relationships across Europe, Asia, and the U.S, with focus on private investments. She advised endowments, foundations, pension funds, and family offices on private equity, venture capital, private credit, and real asset fund- and co-investments. Anouk served on CA’s internal Real Assets, Co-investment, and Private Growth Investment Committees. From 2009 to 2014, she was responsible for CA’s private investment client relationships and business development in Asia, based in Singapore.

Prior to Cambridge Associates, Anouk was a Director at Kennedy Resources, a family office in Boston where she managed a portfolio of early-stage IT and life sciences. Previously, she was a Principal at The Parthenon Group, a strategy consulting firm in Boston. She started her career in investment banking at Merrill Lynch in London. Anouk holds an MBA from Harvard Business School and a BA from the European Business School in London. She currently serves on the Advisory Board of the Isabella Stewart Gardner Museum in Boston, Massachusetts.



**Loida N. Lewis**

**Chair**

Reginald F. Lewis Foundation

**Presenter – 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

**David Grain**

**Chief Executive Officer  
& Founder**

Grain Management

**Recipient – Reginald F. Lewis Award**

Mr. Grain is the Chief Executive Officer and Founder of Grain Management. Prior to founding Grain in 2007, Mr. Grain led Pinnacle Towers (later renamed Global Signal) from bankruptcy to a successful IPO, transforming it into one of the largest independent wireless communication tower companies in the world. Prior to Global Signal, Mr. Grain served as Senior Vice President of AT&T Broadband’s New England Region and was an Executive Director in the High Yield Finance Department at Morgan Stanley.

Mr. Grain is the Lead Independent Director of Southern Company’s Board of Directors, Independent Director of Dell Technologies, Director of New Fortress Energy, Trustee of the Brookings Institution, a member of the Advisory Council of the National Museum of African American History and Culture, and a member of the Board of the Martha’s Vineyard Museum. He is also a Lifetime Member of the Council on Foreign Relations, and a member of Business Executives for National Security.

Education: Mr. Grain holds an M.B.A. from the Amos Tuck School of Business at Dartmouth College, where he serves on the Board of Advisors. He holds a B.A. in English from the College of the Holy Cross, where he served for eight years as a Trustee.



Fireside Chat

**Verdun S. Perry\*\* \***

**Global Head**

Blackstone Strategic Partners

Verdun S. Perry is the Global Head of Blackstone Strategic Partners (“Strategic Partners”), having joined the business in 2000, the year it was founded. Mr. Perry chairs the Investment Committee for each of the Strategic Partners funds and is currently an advisory board member of multiple third-party funds.

Prior to joining Strategic Partners, Mr. Perry worked at Donaldson, Lufkin & Jenrette (“DLJ”), as an Associate in the Investment Banking Division. Prior to joining DLJ, he worked in the strategic acquisitions group at Bozell, Jacobs, Kenyon and Eckhardt, Inc. and in the Investment Banking Division at Morgan Stanley & Co. as a Financial Analyst.

In 2013, Mr. Perry joined the board of SEO, which is an organization focused on narrowing the opportunity gap for minority high school and college students, as well as increasing diversity in the financial services industry. Mr. Perry founded Blackstone’s Diverse Professionals Network (“DPN”) in 2014 and chaired the network for its first 6 years. Mr. Perry serves on the boards of Morehouse College and the Blackstone Charitable Foundation. Mr. Perry was a member of the David Rockefeller Fellows Class of 2016. In 2021, Mr. Perry was selected as a Fellow of the fifth class of the Finance Leaders Fellowship Program and a member of the Aspen Global Leadership Network. Mr. Perry received a B.A. magna cum laude in Business Administration from Morehouse College in 1994, where he was elected Phi Beta Kappa, and an M.B.A. from Harvard Business School in 2000, where he was a Robert Toigo Foundation Fellow.



**David Chiang**

**Chief Investment Officer**

Pritzker Family Foundations

**Moderator – Family Office CIO Roundtable**

David Chiang is the Chief Investment Officer of Pritzker Family Foundations and leads Ganesh Investments, which 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.



**Alisa Mall**

**Chief Investment Officer**

Dell Family Office

**Panelist – Family Office CIO Roundtable**

Alisa Mall is the Chief Investment Officer of Dell Family Office. Prior to joining Dell Family Office in 2022, Alisa was a Managing Director, Corporate Strategy at Foresite Capital, a life sciences/biotechnology firm, where she had responsibility for corporate development, long-term capital strategy, investor relations, human resources, ESG engagement, and other operational areas. For the nearly 12 years prior to Foresite, Alisa was a senior member of the investment team of Carnegie Corporation of New York. She was at Carnegie from 2009 through 2020, where she focused on the management of Carnegie’s real estate and natural resources portfolios, as well as its absolute return and inflation-linked strategies.

Prior to the Carnegie Corporation, Alisa was a director in the Equity Capital Markets group at Tishman Speyer, working with institutional and private investors in connection with its real estate funds. She was also an attorney at Orrick, Herrington & Sutcliffe, where she specialized in general real estate and real estate finance. Alisa serves on the board of JBG Smith (NYSE: JBGS), where she chairs the Compensation Committee, and The Bronfman Fellowship. She is a member of the investment committees of UJA-Federation of New York and Jim Joseph Foundation.

Alisa graduated magna cum laude from Yale College with a bachelor's degree in political science and received her Juris Doctor from Stanford Law School.



**Bei Saville**

**Chief Investment Officer**

Advance Treasury and  
Fingerboard Family Office

**Panelist – Family Office CIO Roundtable**

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





**Runa Alam**

**Co-Founder  
& Chief Executive Officer**

Development Partners  
International

**Moderator – Public Pensions & Endowments Roundtable**

Runa Alam is the co-founder and CEO of Development Partners International (“DPI”).

Runa has more than 35 years of private equity, emerging market management and investment banking experience. She has invested in Africa for 22 years. She serves on the Boards of many African companies. She has contributed to the development of private equity in Africa as a former Chair of AVCA (the African Private Equity Association), Chair of the AVCA Sustainability Committee, and a Vice Chair and Africa Council Member of GPCA (previously EMPEA). Ms. Alam is also on the board of CARE, and on a Future Challenge Committee of the World Economic Forum on “Investing with the UN SDGs.”

Ms. Alam has contributed to efforts in education and development through her written and pro bono work. She sat on the advisory committees at Princeton and Yale Universities and was formerly an Advisory Council member of MIDA (Mobilizing Institutional Investors to Develop Africa’s Infrastructure), NASP-USAID Investment Partnership, and USAID’s Private Sector Partners Committee.

Ms. Alam started her career on Wall Street working for Morgan Stanley and Merrill Lynch. She is a development economist and is a graduate of Princeton University and Harvard Business School. She is a Harry S. Truman Congressional Scholar.



**Steven Meier**

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

Office of NYC Comptroller

**Panelist – Public Pensions & Endowments Roundtable**

As Chief Investment Officer and Deputy Comptroller for Asset Management, Steven Meier, overseeing the five pension systems that compose the New York City Retirement system. Mr. Meier brings nearly 40 years of experience in both the public and private sectors, previously serving as Assistant Treasurer and Interim Chief Investment Officer for the Connecticut Office of the State Treasurer Shawn T. Wooden, overseeing the investments of Connecticut’s \$40 billion public pension system and its ESG initiatives. Before joining the Connecticut state treasurer’s office, Meier spent more than a decade at State Street Global Advisors, where he rose to Executive Vice President and Chief Investment Officer for Global Fixed Income, Currency, and Cash Management, overseeing over \$900 billion in assets. Prior to his time at State Street, he worked at Credit Suisse as Director, Global Head of Fixed Income & Money Market Electronic Trading and Senior Trader in the Global Financing Group at Credit Suisse. His experience also includes roles at Oppenheimer Capital, Merrill Lynch Capital Markets, and Irving Trust Company. Meier is a CFA Charter Holder and certified Financial Risk Manager. He holds an MBA from Indiana University’s Kelly School of Business and a BBA from Hofstra University’s Zarb School of Business.



**Pamela Pavkov**

**Partner**

TPG Next

**Panelist – Public Pensions & Endowments Roundtable**

Pamela Pavkov joined TPG on September 6th, 2022 as a Partner and Managing Director in San Francisco with TPG NEXT.

Before joining TPG, Pamela Pavkov was a Partner at Jasper Ridge Partners where she focused on private equity investing and impact advisory services. Pamela started her career at Cambridge Associates. Pamela is a member of the Wellesley Business Leadership Council and serves on the advisory board for Talking Points, a non-profit supporting the school engagement of under-resourced, multilingual families. Pamela earned a BA in English and Neuroscience from Wellesley College, an MA in English from Stanford University and an MBA and Certificate in Public Management from the Stanford Graduate School of Business. In her spare time, Pamela practices yoga and enjoys outdoor activities with her family.



**Kimberly Sargent**

**Chief Investment Officer**

The David & Lucile  
Packard Foundation

**Panelist – Public Pensions & Endowments Roundtable**

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.



**Andrew Mitro**

**Partner**

StepStone Group

**Moderator – Breakout Panel: Real Estate**

Mr. Mitro is a member of the real estate team and focuses on various investment and portfolio management activities.

Prior to StepStone, Mr. Mitro was a senior vice president at Courtland Partners, Ltd., an international real estate advisory firm which integrated with StepStone Real Estate. Mr. Mitro was responsible for providing investment consulting services to Courtland clients and has significant experience working with clients based outside the United States.

Mr. Mitro received an MBA from Case Western Reserve University and a BA from Ohio State University.



**Danita Johnson**

**Managing Director,  
Real Assets**

Maryland State Retirement  
and Pension System

**Panelist – Breakout Panel: Real Estate**

Danita Johnson is a Managing Director in the Maryland State Retirement and Pension System’s (MSRPS) Investment Division which is responsible for oversight of the system’s investment portfolio. As a member of the senior management team, Ms. Johnson’s primary role is to lead the management of the real assets portfolio which includes public and private real estate, infrastructure, and natural resources investments.

Prior to joining the MSRPS, Ms. Johnson was Principal Investment Officer for the Connecticut Office of the State Treasurer where she had primary responsibility for the Real Assets portfolio. At Connecticut, Ms. Johnson led the investment of over \$3.5 Billion of new commitments across real assets sectors, assisted in the development of a private markets co-investment program, and developed the plan’s REIT investment program. Ms. Johnson was previously a member of the private real assets team at Franklin Templeton Investments where she served as a Portfolio Manager for several separate accounts and helped to spearhead the firm’s diverse/emerging manager initiatives. Prior to joining Franklin Templeton, Ms. Johnson was an Investment Officer on the real estate team with the NYC Comptroller’s Office. Ms. Johnson also held positions with Prudential Financial in the Equity Research Group and with Credit Suisse in the Credit Risk Management Division.

Ms. Johnson holds a B.A. in Economics from the University of North Carolina at Chapel Hill. She is a member of the Pension Real Estate Association (PREA) Board of Directors and Social Impact Committee, the Limited Partner Advisory Council for the Sponsors for Educational Opportunity (SEO), the Investor Board for Alternative Investments Forum (AIF) Global, and the Institutional Limited Partners Association (ILPA). She is also a Board Member and serves as Treasurer for the New York Covenant Community Development Corporation.



**Eric Requenez**

**Partner**

Ropes & Gray

**Panelist – Breakout Panel: Real Estate**

Eric Requenez is a partner in Ropes & Gray’s asset management group in New York. He focuses his practice on private funds, representing fund sponsors, distributors, and investors in connection with the formation, structuring, and capitalization of private investment funds as well as other securities offerings, regulatory and compliance matters, transactions and other corporate matters. Eric is recognized by Chambers USA and Chambers Global as a “private equity: fund formation” leader, and his clients have been quoted saying that he is a “very detail-oriented and experienced private fund counsel”, “able to provide valuable insight and guidance on industry standards”, they “have an excellent working relationship” and “he is accessible at any time.”

Eric focuses on advising fund sponsors and placement agents in the structuring, negotiation and capitalization of U.S. and non-U.S. private funds, including real estate funds, credit funds, energy funds, infrastructure funds and private equity funds. Eric has significant experience representing sponsors in the formation of open-ended real estate, infrastructure, and other illiquid asset funds. According to Chambers, “He has incredibly strong commercial awareness and offers incredibly insightful solutions to complex matters.”

In addition, Eric counsels clients on the formation of advisory and management entities.

Eric also is a frequent contributor to Private Equity Law Report and served on Law360’s Editorial Advisory Board for Private Equity in 2020 and 2021.



**Lenny Stokes**

**Managing Director**

Clover Capital

**Panelist – Breakout Panel: Real Estate**

Lenny Stokes is Co – Founder/Managing Partner of Clover Capital (Clover Group Inc). Clover is the largest independent active adult senior housing developer in the country with +60 developments at 98% occupancy throughout the United States. Clover has purchased and/or developed over 10,000 apartment units and over 800,000 square feet of commercial space, totaling more than \$2.5 billion located in Indiana, Kentucky, Michigan, Missouri, New York, North Carolina, Ohio, and Pennsylvania.

Lenny was born and raised in Buffalo, NY. In 1999 he was named Mr. Basketball of New York State, later that year he attended The University of Cincinnati on a full athletic scholarship. While at the University of Cincinnati Lenny was the first academic All-American in men’s basketball history, graduated in three years with a dual degree (Liberal Arts & Social Sciences) and took courses to complete his master’s degree (Finance) his senior year. Upon graduation, Lenny played professional basketball from 2003-2008.

**Board Appointments**

Cristo Rey High School Professional Work Study Program Committee

Cancer Support Community

University of Cincinnati Kolodzik Business Scholars Advisory Board

Boys and Girls Scouts of America fundraising Committee (Past Appointment)

University of Cincinnati Bicentennial Committee (Past Appointment)

Cancer Support Community Evening of Hope Committee Member (Past Appointment)

Cancer Support Community Development Committee Member (Past Appointment)



**Careina Williams\***

**Managing Director**

Sundance Bay

**Panelist – Breakout Panel: Real Estate**

Careina has 17 years of real estate investment and finance experience and nearly two years of tenure with the Sundance Bay Advisory Board. She has acquired and/or asset managed over \$1.8B in real estate assets throughout the United States. Previously, Careina served as C.O.O. of a small, short opportunistic equity hedge fund and Principal of Acquisitions and Asset Management at Artemis Real Estate Partners.

At Artemis she contributed significantly to helping grow the core plus emerging manager business from \$300M to over \$1 B.N., with three institutional pension fund clients and 27 managers, in addition to serving on the Investment Committee. Before Artemis, Careina served as Principal, Investments for Capri Capital Partners, L.L.C. (“Capri”). She was responsible for origination, investment structuring, and asset management of equity and structured finance investments. Careina also worked for Goldman Sachs within the Investment Banking Division and at Bertelsmann Music Group. Careina graduated with honors from Harvard University (A.B. Economics) and has an M.B.A. from Harvard Business School. She is a member of the Urban Land Institute – Silver Retail Counsel.





**Joanne Yoo\***

**Partner**

Development Partners International

**Moderator – Breakout Panel: Sustainable Investing**

Joanne Yoo is a Partner at Development Partners International (DPI), a leading venture capital and private equity investment firm with \$3 billion under management targeting high growth, impact-driven and innovation-led companies in emerging markets. In addition, Ms. Yoo is a venture investor in early stage technology companies, and in this capacity, serves on various Investment Committees and Advisory Boards. In 2020, Ms. Yoo was appointed by the Chairman of the U.S. Securities and Exchange Commission (SEC) to the Investor Advisory Committee. 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. Ms. Yoo is currently serving on Harvard Kennedy School Dean’s Council. Ms. Yoo received a B.S. in Commerce with concentrations in Finance and International Business from the McIntire School of Commerce at the University of Virginia; a Master’s in Public Administration from the Kennedy School at Harvard University; and an M.B.A. from Columbia Business School, where she was awarded a Morgan Stanley Fellowship.



**Angelo Acconcia**

**Partner**

ArcLight

**Panelist – Breakout Panel: Sustainable Investing**

Mr. Acconcia joined ArcLight in 2022 and has nearly two decades of private equity and energy investing experience. Prior to joining ArcLight, he was a Senior Managing Director at Blackstone, having spent over 17 years in their Private Equity Group and was one of the founding partners of their energy fund, Blackstone Energy Partners. During his time at Blackstone, Mr. Acconcia worked across a diverse set of sectors including chemicals, industrials, packaging, power, technology, telecom and upstream. Before joining Blackstone, Mr. Acconcia worked at Morgan Stanley in their Global Energy and M&A group, and at CIBC in Investment Banking in Canada and Hong Kong. Mr. Acconcia holds an Honors degree in Business from Queen’s University in Canada.



**Justin Conway**  
**Vice President,**  
**Investment Partnerships**  
 Calvert Impact Capital

**Panelist – Breakout Panel: Sustainable Investing**

Justin Conway is Vice President of Investment Partnerships at Calvert Impact Capital, an impact investment firm helping people and institutions invest for racial, gender, economic, and climate justice. Justin manages the Community Investment Note program and the Investor Relations team that has supported over 20,000 investors and financial professionals on their impact investing journeys. He also sits on the Staff Investment Committee, and led Calvert Impact Capital’s subsidiary investment advisor in providing customized portfolio services to impact investors.

Justin currently serves on the board of Aeris, which is focused on driving transparency and accountability in impact investing, and on advisory committees for US SIF, Invest Microfinance Cooperative, and the Global Impact Investing Network. He has also served on the boards of US SIF, the association of financial professionals engaged in ESG and impact investing, and Green America, dedicated to harnessing our economic power to create a sustainable world. Before joining Calvert Impact Capital:

Justin managed the Community Investment Program of the Social Investment Forum and Green America. Before that he worked on human and economic rights in both Asia and Central America. He received a Master’s in Applied Economics from Johns Hopkins University and a Bachelor’s in Sociology and Statistics from James Madison University.

Outside of work, Justin enjoys: Playing in and around Washington DC with his amazing wife and daughter. Justin's favorite travel destinations are: Wherever he's headed next and Outer Banks of North Carolina with friends and family.



**Lila Preston**

**Partner  
& Head of Growth Equity**

Generation Investment  
Management

**Panelist – Breakout Panel: Sustainable Investing**

Lila joined Generation in 2004 and is the Head of the Growth Equity Strategy. Prior to joining Generation, Lila was a Director of Finance & Development at VolunteerMatch. Previously, she was a Fulbright Fellow in Southern Chile where she worked on community-based forestry and conservation projects. Lila currently serves as a Board Observer at Pivot Bio, Nature’s Fynd, Guideline, CiBO Technologies, and Optoro. She is on the Board of Advisors at Columbia University’s Mailman School of Public Health and is a Young Global Leader of the World Economic Forum. Lila received a BA in English Language and Literature from Stanford University and an MBA from London Business School.



**Radhika Shroff**

**Managing Director,  
Private Equity Impact  
Investing**

Nuveen

**Panelist – Breakout Panel: Sustainable Investing**

Radhika is a managing director on the Private Equity Impact Team at Nuveen and is responsible for identifying, executing and managing direct private equity investments in key thematic impact sectors in both developed and developing markets.

Prior to joining the firm in January 2020, Radhika was the Deputy Chief Investment Officer of Accion Global Investments, responsible for leading global equity investments and managing a portfolio of equity investments in over 20 financial institutions and innovative financial services providers that support underserved populations in emerging markets. Before Accion, she spent 15 years in various investment, advisory and operational roles including Latin America investment banking, global consumer and commercial banking and microfinance principal investing at financial services institutions including UBS, Citi, Wells Fargo and Peruvian Development Group.

Radhika graduated with a B.S. in Economics and a B.A. in Psychology from The University of Pennsylvania, an M.B.A. from The Wharton School and an M.A. in International Studies, with a concentration in Latin America, from The Lauder Institute and she is a former Luce Scholar with the Thai Ministry of Finance. Radhika sits on the board of Yuva Pragati, a non-profit focused on child health and wellness in rural India and is fluent in Spanish and Gujarati.



**Yokasta Segura-Baez**

**Managing Director,  
Investor Relations**

ArcLight

**Moderator – Breakout Panel: Stepping Out With Fund I**

Mrs. Segura-Baez joined ArcLight in 2022. Prior to joining ArcLight, she was with Capital Dynamics, where she was responsible for strategic investor and consultant relationship management and capital raising in North America. Previously, she held senior positions with Campbell Lutyens, Pantheon, and Ardian. She has also been extensively involved in promoting both diversity and ESG initiatives. Mrs. Segu holds a B.S. in International Law from the University of Santo Domingo, an M.A. in International Relations & Politics from the University Catolica de Santo Domingo and a Finance Certification from New York University.



**Patricia Miller Zollar**

**Managing Director**

Neuberger Berman

**Panelist – Breakout Panel: Stepping Out With Fund I**

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.



**David Perez**  
**Co-Founder  
 & Managing Partner**  
 Avance Investment  
 Management

**Panelist – Breakout Panel: Stepping Out With Fund I**

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.



**Sanjiv Shah**  
**Managing Director**  
 HarbourVest Partners

**Panelist – Breakout Panel: Stepping Out With Fund I**

Sanjiv Shah is a member of HarbourVest’s primary investment team, focusing on meeting the targeted mandates of institutional investors by seeking investment opportunities in emerging managers, diverse managers, the lower middle market, and underserved markets. His responsibilities include deal origination, due diligence, and the structuring of new investment opportunities.

Sanjiv joined HarbourVest in 2016 as part of its acquisition of the BAML Capital Access Funds business, which he co-founded in 2002, from Bank of America. He joined the Bank in 1994, and was instrumental in growing its portfolio of community development equity-related investments, including the formation of the group’s existing fund-of-funds investment vehicles. Sanjiv serves on the limited partner advisory boards of several private equity funds in which the group is invested.

He received a BS in Accounting from the University of Illinois at Urbana-Champaign and an MBA from the Kellogg School of Management at Northwestern University.



**Fernando Vigil\***  
**Managing Partner  
 & Chief Investment Officer**  
 Teca Partners

**Panelist – Breakout Panel: Stepping Out With Fund I**

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 U.S., 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 B.A. in Economics (with distinction) from Yale University and an MBA from Harvard Business School, where he was a Baker Scholar and Siebel Scholar.



**José Arredondo\***  
**Principal**  
 Warburg Pincus

**Moderator – Breakout Panel: Breaking Into The Buyside**

José Arredondo is based in New York, joined Warburg Pincus in 2021 and focuses on investments in the Financial Services sector. Prior to joining Warburg Pincus, Mr. Arredondo was a Principal in Blackstone’s Tactical Opportunities Group where he focused on investments across the residential mortgage and life insurance sectors for over seven years. Previously, Mr. Arredondo was an Analyst in the Consumer & Retail Group of the Investment Banking Division at Goldman Sachs. He holds a Bachelor’s of Science in Business Administration with Finance and Accounting majors from Georgetown University’s McDonough School of Business.





**Milo Dee**

**Principal**

Berkshire Partners

**Panelist – Breakout Panel: Breaking Into The Buyside**

Milo Dee is a Principal and a member of the Consumer team at Berkshire Partners. He is currently involved with Berkshire portfolio companies El Dorado Foods, Implus, Kendra Scott and Mielle Organics. Prior to joining Berkshire in 2020, he was a Co-Founder of Coast Up, a company that launches and grows consumer brands that have meaningful direct marketing opportunities. Previously, he was a Vice President at Sycamore Partners and an Associate Consultant at Bain & Company. Milo received a B.A. from Amherst College and an M.B.A. from Harvard Business School.



**Stacy Levine**

**Partner**

Amity Search Partners

**Panelist – Breakout Panel: Breaking Into The Buyside**

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.



**Martha Masiarz**

**Vice President**

Odyssey Search Partners

**Panelist – Breakout Panel: Breaking Into The Buyside**

Martha Masiarz joined Odyssey Search Partners in early 2019 and has been finding talent for the buy side for over 4 years. She specializes in placing candidates in investment and investor relations/marketing roles at fundamentally driven alternative investment firms, across both the junior and senior levels. Prior to joining Odyssey, Martha worked at Wells Fargo Securities in both investment banking and equity research. She received a Bachelor of Science in Finance from Wake Forest University. As a first-generation American/college graduate, Martha is passionate about helping young professionals navigate their early career moves.



**Nellie McCullough**

**Principal**

Henkel Search Partners

**Panelist – Breakout Panel: Breaking Into The Buyside**

Throughout her tenure at HSP, Nellie has worked on a wide range of engagements across industries. She supports the team on all aspects of the search process including sourcing, candidate evaluation, and facilitation of all logistical elements. Nellie initially gained exposure to recruiting during her internship at Agenus, a biotechnology company, where she worked as an intern in Human Resources and assisted in candidate assessment and scheduling, as the firm was expanding its UK presence. Nellie previously interned with HSP and joined full-time upon graduation.

Education: University of Virginia – B.A. in Media Studies, Minor in Spanish

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

**CEO**

The Williams Legacy Foundation

**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

**Alex Doñé**

**Managing Director**

Platinum Equity

**Karen Eifler**

**Managing Director, Public Markets**

Howard Hughes Medical Institute

**Nancy Fahmy**

**Managing Director, Head of**

**Alternative Investments**

Bank of America

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#### **Managing Director, Private**

**Investments & Real Assets**  
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#### **Chief Executive Officer**

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#### **Senior Vice President**

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### **Dana Johns**

#### **Senior Portfolio Manager,**

#### **Private Equity**

Maryland State Retirement and  
Pension System

### **Danita Johnson**

#### **Managing Director, Real Assets**

Maryland State Retirement and  
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Columbia Investment  
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Director, Private Equity &  
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Senior Portfolio Manager, Private  
Equity & Special Opportunities  
Alaska Permanent Fund Corporation

**Dhvani Shah**

Chief Investment Officer  
JM Family Enterprises, Inc

**Anita Sonawane**

Real Assets Analyst  
Bessemer Trust

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Real Assets Investment Professional  
Pennsylvania Public School  
Employees' Retirement System

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Investment Director  
California Public Employees'  
Retirement System (CalPERS)

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Cleveland Clinic

**Jones Thomas**

Investment Director  
Capricorn Investment Group

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Global Head of Legal  
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Co-Executive Chairman**  
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**Chief Operating Officer**  
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**Co-Founder & Managing Partner**  
Siris Capital Group, LLC

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**Milton Berlinski**

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

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**Orlando Bravo**

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

**Maya Chorenge**

**Co-Managing Partner**  
The Rise Fund

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**Senior Partner**  
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**Managing Director**  
TA Associates



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**Managing Director**  
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**Deborah L. Harmon**

**Co-Founder and CEO**  
Artemis Real Estate Partners

**Carla Harris\***

**Senior Client Advisor**  
Morgan Stanley

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**Senior Partner and  
Executive Chairman**  
Hg Capital

**Chris Lee\***

**Head of Real Estate Americas**  
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**Eric J. Lee**

**General Partner**  
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**Ninon Marapachi\***

**Managing Director**  
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**Maybel Marte\***

**Managing Director**  
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**Kenneth B. Mehlman**

**Partner**  
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**Kammy Moalemzadeh\***

**Founder & Managing Partner**  
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**Executive Chairman**  
SELECTA Group AG

**Oscar Salazar**

**Entrepreneur & Technologist**  
Ogon, LLC

**Julian C. Salisbury**

**Chief Investment Officer,  
Asset & Wealth Management**  
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**Founder**  
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**Managing Director**  
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**Keith H. Wofford\***

**Partner**  
White & Case LLP

**Kathryn Wylde**

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

SEO Scholars is a free, eight-year academic program that gets public high school students in New York City, San Francisco, and Guilford County, NC 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 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.

**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          |                      |



**80%+**

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

**960+**

college students in the SEO Career Summer Intern Class of 2022

**200+**

partners in 45+ cities

**8,400+**

alumni

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 Fellows secure offers

**550+**  
candidates in pipeline

**65+**  
partners

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
- Business leaders
- Advocates
- Politicians



## 180+

Fellows in the Class of 2023

## 49

partners in 18 cities around the nation

## 1,800+

alumni

## 61

Catalyst participants in the Class of 2023

The SEO Leadership Institute supports SEO alumni at every stage of their career to help realize SEO's mission of a more equitable society. There are three distinct features to the programming: making connections, personal and professional development resources, and civic engagement.

SEO Protégé: matches senior-level professionals with SEO alumni who are embarking on their careers. These relationships provide the guidance that young professionals need to start strong.

SEO Law Advance: combines professional development with tangible and targeted DEIB strategies for managers, allies, and senior leaders at SEO partner companies to help attorneys from historically excluded backgrounds progress in their career.

SEO Talent Opportunity Center: allows middle-market alternative investments firms to promote career opportunities to SEO alumni experienced in finance and banking.



**13,000+**

Alumni of SEO USA programs

**21,000+**

Alumni of SEO programs around the globe

**14**

partners





Grain Management is proud to sponsor  
**SEO's 14th Annual  
Alternative Investments Conference (AICON)**



**GRAIN**  
MANAGEMENT

Grain Management, LLC is a leading private investment firm that focuses on communications infrastructure and technology companies that connect the world to the information economy. Founded in 2007, the Firm invests exclusively in the global broadband industry, employing a rigorous, data-based process buoyed by deep sector expertise to identify investment opportunities in key areas of communications, including fiber networks, wireless spectrum, cell towers, infrastructure services, and managed services.

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# KKR

## What will we achieve, together?

KKR, together with SEO, is steadfast in our commitment to a more diverse and inclusive financial services industry. We are proud to support SEO's mission to be a catalyst for change and look forward to seeing what more we can achieve together.



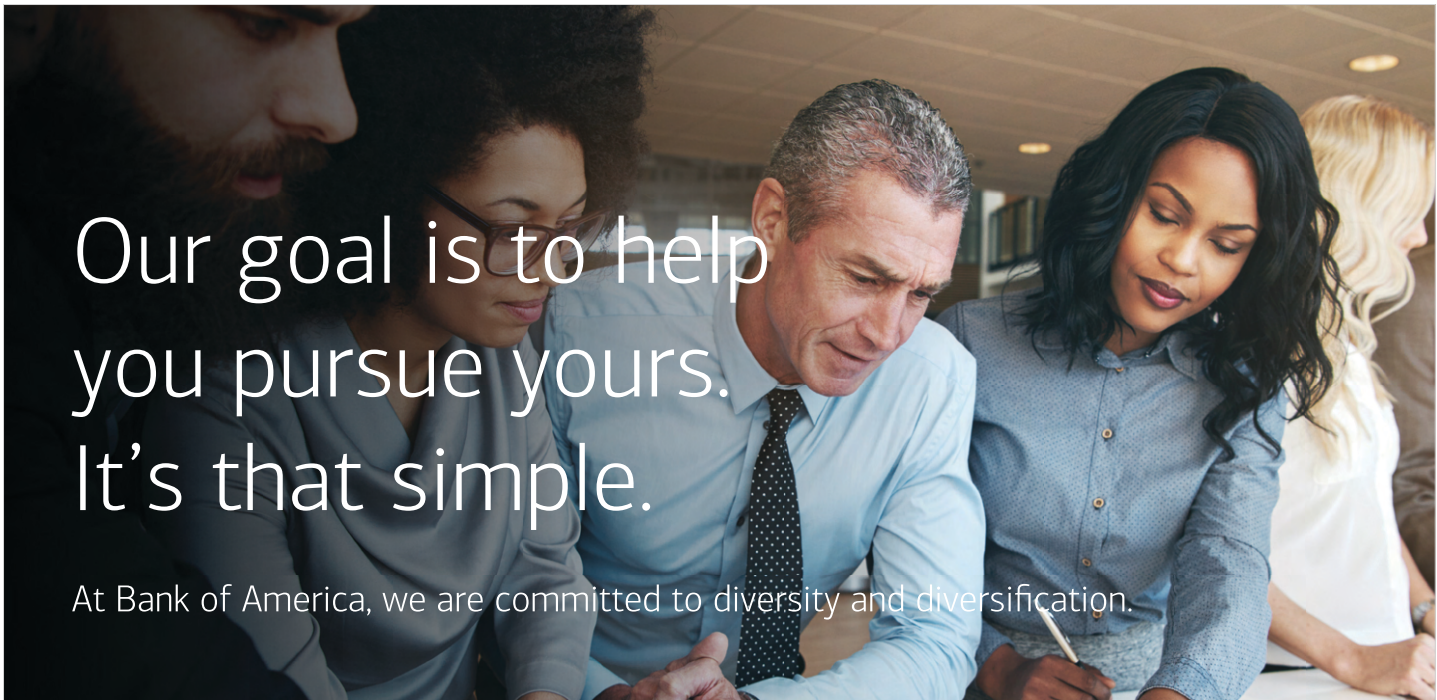
While talent is distributed equally, the opportunity to succeed is not.

Siris is proud to support SEO and its critical mission of providing education, exposure, training, and mentorship opportunities to talented professionals traditionally underrepresented in the alternative investments sector.

SEO

 SIRIS





Our goal is to help  
you pursue yours.  
It's that simple.

At Bank of America, we are committed to diversity and diversification.

The Investment Solutions Group Alternative Investments team is proud to participate in the 2023 Sponsors for Educational Opportunity Alternative Investments Conference.

For more information visit [ml.com/solutions/alternative-investments.html](https://ml.com/solutions/alternative-investments.html)



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22

Years of  
Experience

7

Infrastructure  
Funds

ARCLIGHT

Today's Infrastructure  
Tomorrow's Solutions

124

Completed  
Transactions

\$27

Billion Total  
Invested

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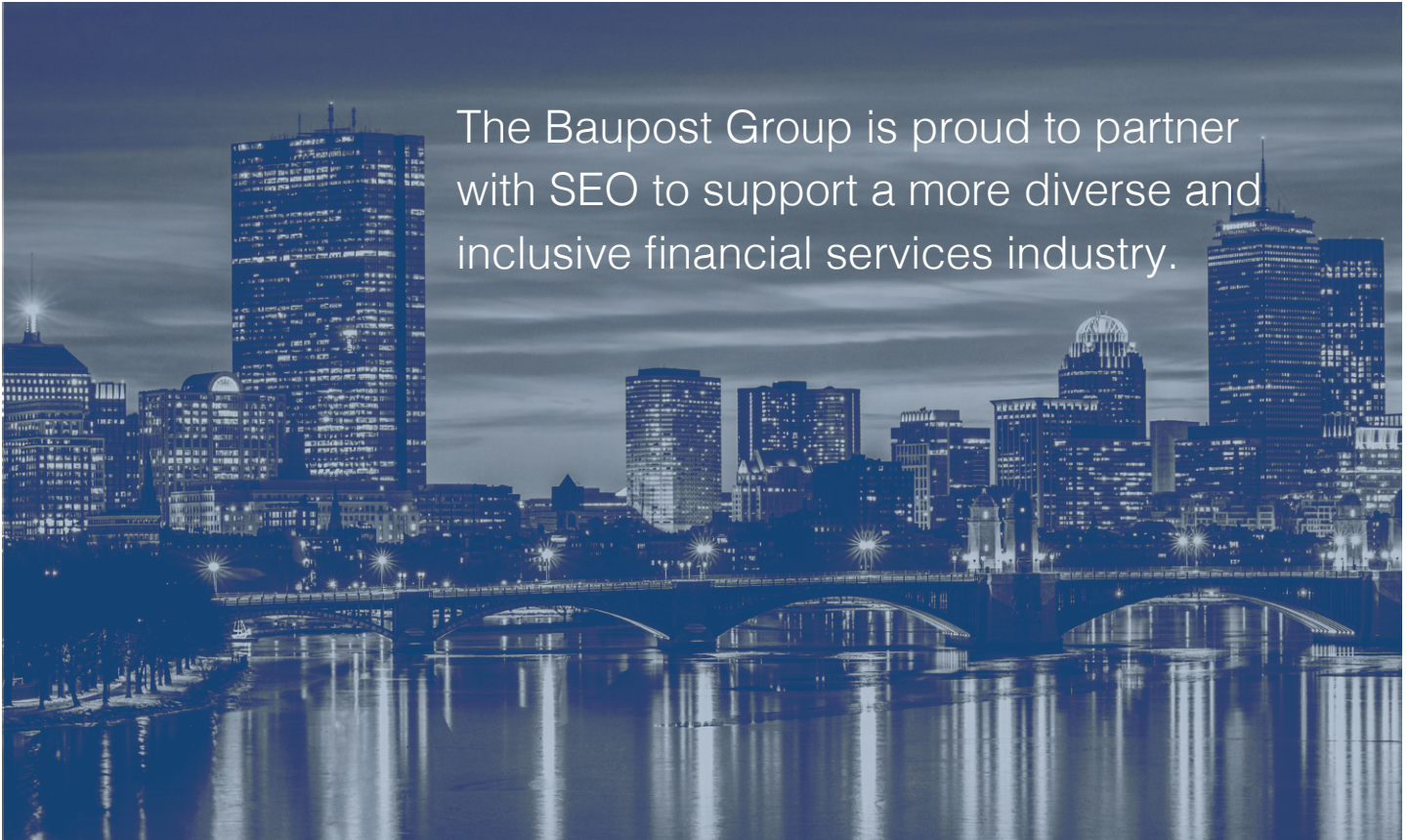
AVANCE IS A PROUD SPONSOR OF SEO's 14TH ANNUAL ALTERNATIVE INVESTMENTS CONFERENCE

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, Technology and Consumer sectors across the U.S.



AVANCE





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

BAUPOST

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# SEO alum Verdun Perry and Blackstone are proud to sponsor SEO's Fourteenth Annual Alternative Investments Conference



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International

**DPI is a proud sponsor of SEO's 14th  
Annual Alternative Investments  
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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



DPI is a leading private equity and venture capital firm with \$3 billion under management targeting high growth, impact-driven and innovation-led companies in Africa.

For more information please visit  
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And we support SEO's continuing efforts to close the opportunity gap.

GCM Grosvenor's diverse, engaged team is critical to our ability to successfully create and deliver value to our clients. We are committed to creating an inclusive environment where diverse professionals can thrive, and we are dedicated to training, retaining, and promoting minorities, women, LGBTQ employees, veterans, and individuals with disabilities.

61% of our US employees and 33% of executive management are women and/or ethnically diverse individuals.

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Oaktree is a leader among global investment managers specializing in alternative investments, with \$170 billion in assets under management as of December 31, 2022. 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 1,050 employees and offices in 20 cities worldwide.

[oaktrecapital.com](https://oaktrecapital.com)

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## Investing in Diverse Perspectives

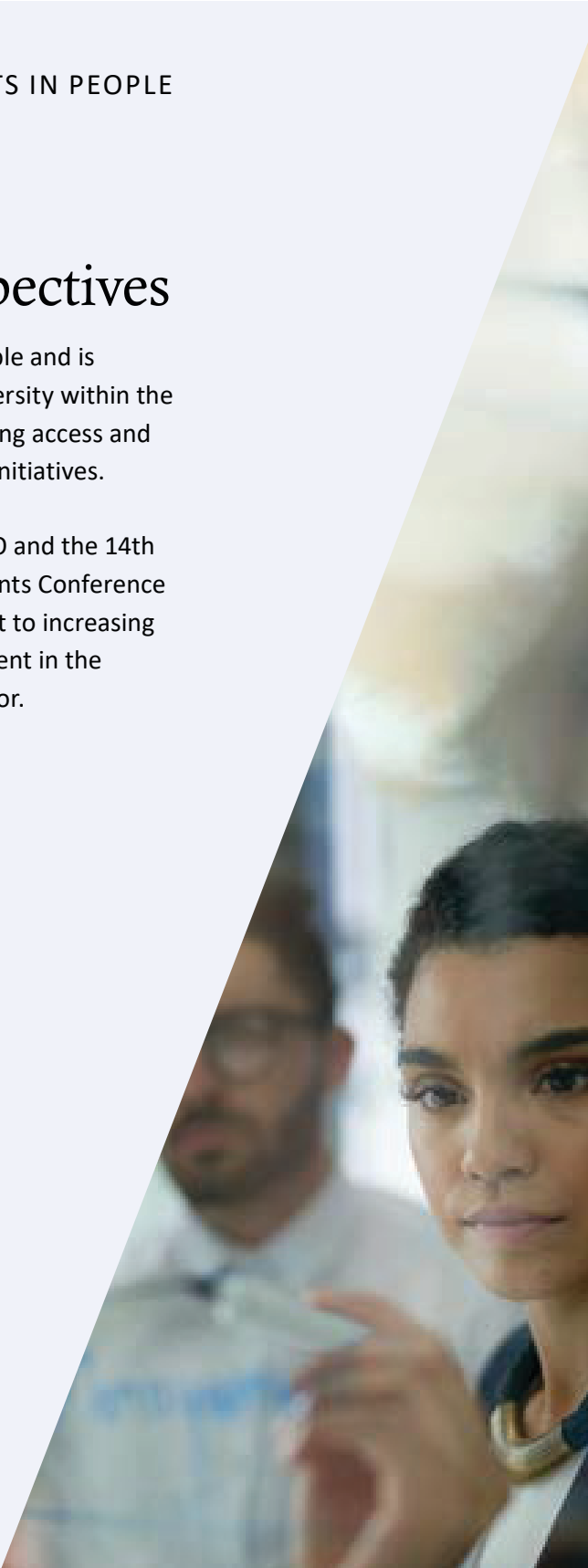
Adams Street invests in people and is committed to increasing diversity within the financial markets by enhancing access and contributing to educational initiatives.

We are proud to support SEO and the 14th Annual Alternative Investments Conference and share SEO's commitment to increasing access and career development in the alternative investments sector.

For more information, visit  
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American Securities is proud to support  
SEO's commitment to creating opportunities  
for underrepresented professionals in the  
alternatives sector.



Based in New York with an office in Shanghai, American Securities is a leading U.S. private equity firm that invests in market-leading North American companies with annual revenues generally ranging from \$200 million to \$2 billion. American Securities and its affiliates have approximately \$26 billion under management.



AMERICAN SECURITIES

[www.american-securities.com](http://www.american-securities.com)





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.

A nighttime photograph of a city skyline reflected in a river. The sky is dark, and the city lights are glowing. A large bridge with multiple arches spans the river in the foreground. The buildings in the background are illuminated, with some having distinctive architectural features like domes or spires.

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

BAUPOST



CARLYLE

# Building Better

At Carlyle, we know that diverse teams perform better, so we seek to create a community where we continually exchange insights, embrace different perspectives and challenge the status quo.

Carlyle is a proud supporter of SEO and sponsor of the Alternative Investments Conference.

[CARLYLE.COM](https://www.carlyle.com)



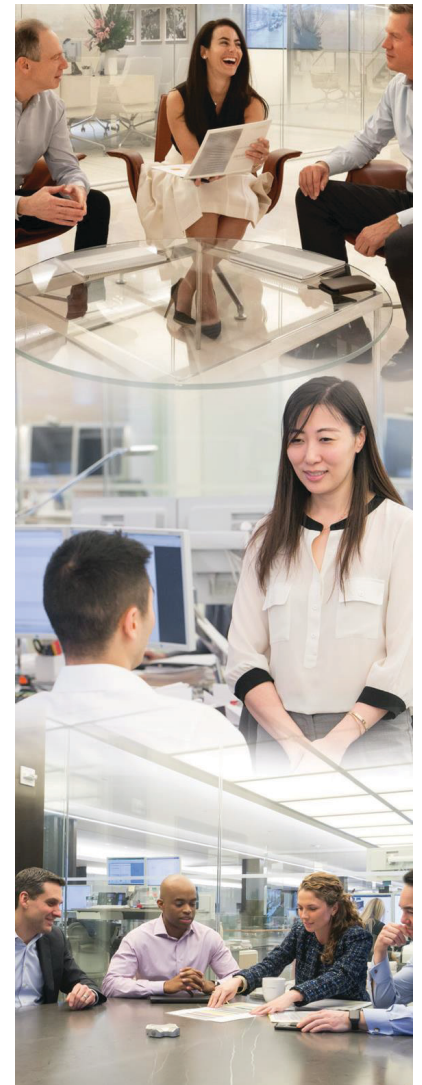


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# CENTERBRIDGE PARTNERS IS PROUD TO SUPPORT

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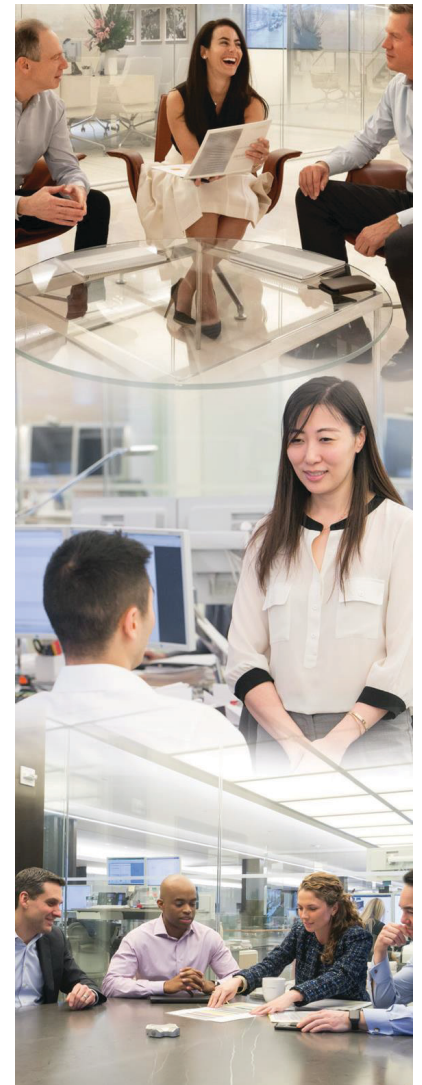


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## Community Focus, Hands-On Approach

CIM is proud to sponsor SEO's 14th Annual Alternative Investments Conference.

We support SEO's commitment to expanding opportunities for professionals from backgrounds traditionally underrepresented in alternative investments.

[Learn more at CIMGroup.com.](http://CIMGroup.com)

# CIM

Creating Value.  
Enhancing Communities.

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**UNITED. CONSISTENT. GROWTH.**

Growth Focused Middle Market Private Equity





# Davidson Kempner

Davidson Kempner Capital Management  
is a proud sponsor of SEO's Annual  
Alternative Investments Conference



## DE Shaw & Co

**We're the D. E. Shaw group, a global investment and technology development firm with over 2,000 people around the world.**

**We're excited to sponsor SEO's work and its 14th Annual Alternative Investments Conference.**

The D. E. Shaw group is honored to continue supporting SEO's mission to create a more equitable society by closing the academic and career opportunity gaps for underserved and historically excluded communities.

Building new things together is at the core of what we do. Whatever you bring here, this is a place where curious people who see the world differently can thrive.

Learn more about our fellowships, internships, and full-time opportunities at [deshaw.com/careers](https://deshaw.com/careers).



# DigitalBridge is proud to sponsor SEO's 14<sup>th</sup> Annual Alternative Investments Conference (AICON)

## THE DIGITALBRIDGE DIFFERENCE

We strongly believe that creating and maintaining a diverse workplace environment, that recognizes and values human differences while fostering inclusiveness, makes us a better global company.

DigitalBridge (NYSE: DBRG) is a leading global digital infrastructure investment firm. With a heritage of over 25 years investing in and operating businesses across the digital ecosystem including cell towers, data centers, fiber, small cells and edge infrastructure, the DigitalBridge team manages a \$65 billion<sup>1</sup> portfolio of assets on behalf of its limited partners and shareholders across private equity, private credit, public equity and venture capital.



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GTCR proudly supports the SEO Alternative Investments Conference. In partnership with SEO, GTCR fosters career growth for professionals from backgrounds traditionally underrepresented in the alternative investments sector.

GTCR

[www.gtcr.com](http://www.gtcr.com)





# H.I.G. Capital

is a proud sponsor of

SEO's Annual Alternative  
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H.I.G. Capital is a leading global alternative investment firm  
with \$55 billion of equity capital under management.\*

[higcapital.com](http://higcapital.com)

\*Based on total capital commitments managed by H.I.G. Capital and affiliates



# ICG

## A proud partner of SEO

ICG creates sustainable value by partnering with ambitious businesses. We are a global alternative asset manager with a track record of over 30 years, managing \$74.5bn of assets and investing across the capital structure.

As a partner of the 14th Annual Alternative Investments Conference, we are committed to improving social mobility and enhancing diversity and inclusion.

[www.icgam.com](http://www.icgam.com)





**KSL Capital Partners** is proud to sponsor SEO's 14<sup>th</sup> Annual Alternative Investment Conference and to support SEO's ongoing efforts to close the opportunity gap and create a more diverse and inclusive industry.

KSL Capital Partners, LLC is a private equity firm investing exclusively in exceptional Travel & Leisure businesses, with a focus on operational excellence and collaborative partnership. We are a global team of passionate operators and investors. With offices spanning North America and Europe, we combine our global perspective with local know-how to create unforgettable experiences.



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[kslcapital.com](http://kslcapital.com)



# L CATTERTON

*L* Catterton, the world's leading consumer growth investor, is proud to support SEO and the Alternative Investments Fellowship Program.

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# Partnering with **SEO** to champion diversity and inclusion.

**Norwest Equity Partners** is proud to partner with **SEO** to support their commitment to diversity and inclusion within the private equity industry.

We build growing middle market companies the right way by making their goals our own. With over 60 years of investing experience, we act as long-term owners, not just investors, as we partner with companies to create lasting value.

Learn more about our approach at [nep.com](https://nep.com).

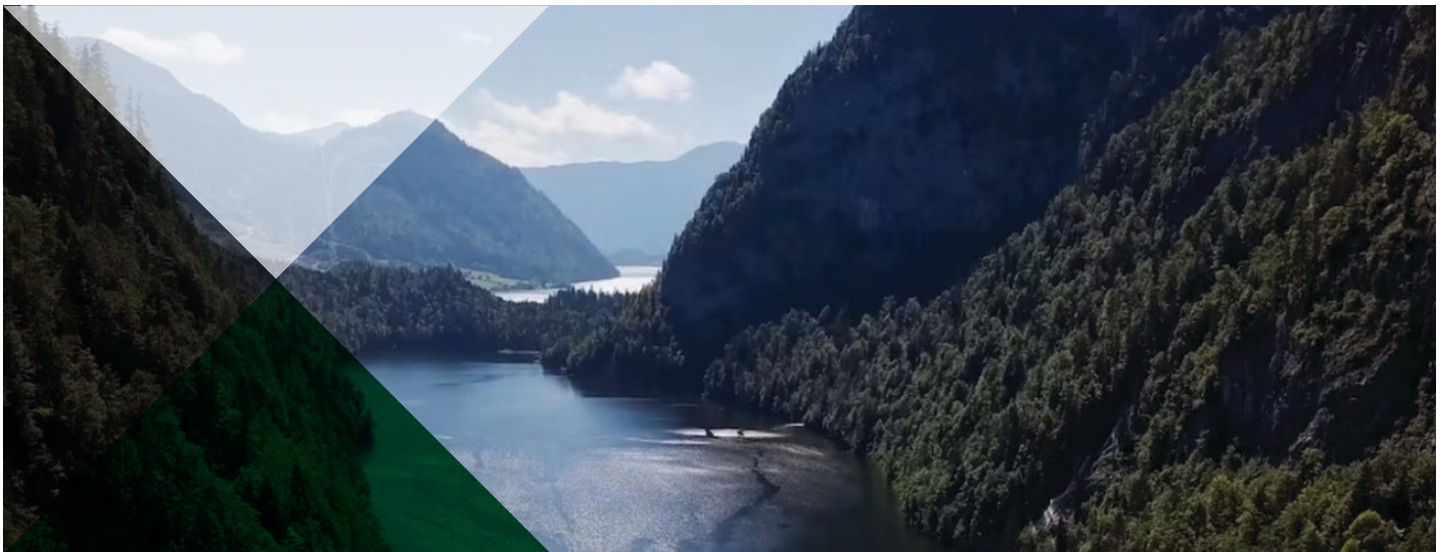
MINNEAPOLIS - WEST PALM BEACH



Odyssey is a proud sponsor of

## SEO'S 14TH ANNUAL ALTERNATIVE INVESTMENTS CONFERENCE.

We are proud to partner with an organization that is committed to closing the opportunity gap for underrepresented communities in the alternatives investment industry.



Odyssey is a top private equity firm with a rigorous approach to thematic investing in industrial and business services markets. Through our Buy, Build and Integrate approach, we transform middle-market companies into highly efficient, diversified leaders with attractive long-term growth profiles. Since 1997, our commitment to collaborative, proactive engagement has been rewarded with lasting partnerships.

Please visit our website [www.odysseyinvestment.com](http://www.odysseyinvestment.com) for more information.





## Multiplying the potential of companies and people.

Permira is a global investment firm that backs successful businesses with growth ambitions. Founded in 1985, the firm advises funds with total assets under management of US\$82.6bn and makes long-term majority and minority investments across two core asset classes, private equity and credit. The Permira private equity funds have made approximately 300 private equity investments in four key sectors: Technology, Consumer, Healthcare and Services.

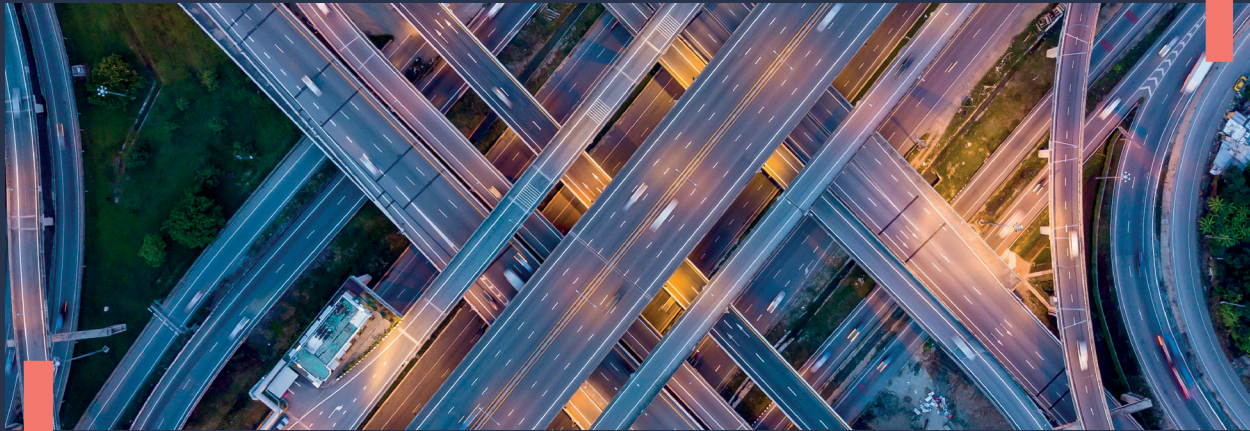
Permira employs over 470 people in 15 offices across the United States, Europe, and Asia.

For more information, visit [www.permira.com](http://www.permira.com) or follow us on LinkedIn or Twitter.



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# Stonepeak is proud to sponsor SEO's Fourteenth Annual Alternative Investments Conference

Stonepeak is a leading global infrastructure investor with \$53.4bn of assets under management.

We specialize in infrastructure and real assets, investing capital on behalf of pensions, endowments and other large institutions from around the world, looking to grow these critical assets to create value for all stakeholders.

To learn more about how we're shaping the future of infrastructure, visit [www.stonepeak.com](http://www.stonepeak.com)

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TA is proud to sponsor

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Since 1968, TA, a leading global private equity firm, has focused on scaling growth in high-quality, profitable companies. Our dedicated investment and portfolio teams specialize in five target industries – technology, healthcare, financial services, consumer and business services – collaborating closely with management teams to accelerate growth and create lasting shareholder value.

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# 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](https://vistaequitypartners.com).

# WARBURG PINCUS

Warburg Pincus is proud to sponsor the  
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The SEO Talent Opportunity Center (TOC) assists Middle-Market alternative investments fund managers in identifying and recruiting Black, Latinx, and Native American investment professionals. The TOC talent pool includes more than 2,600 SEO alumni presently working at Wall Street’s leading investment banks, asset managers, and buy-side firms, including 1,200 young professionals with one-to-five years of experience.



**Partnering with SEO**

By partnering with SEO, your firm will gain access to a large pool of highly talented and vetted Black, Latinx, and Native American finance professionals across all experience levels.

The Talent Opportunity Center draws on SEO’s more than forty-year track record as the chief source of underrepresented talent at the analyst level for Wall Street firms, including Goldman Sachs, Morgan Stanley, JPMorgan, Bank of America, Citi, Lazard, and Evercore. In Summer 2021, SEO placed more than 330 investment banking and alternative investments summer interns at partner firms, with more than 85% of rising seniors receiving full-time job offers.

**A Second Benefit:  
Addressing LP Interest  
in Increasing Diversity  
at Fund Managers**



In addition to gaining access to an expanded, skilled talent pool by partnering with SEO, your firm will be taking an important step toward addressing the heightened interest among LPs in increased diversity among fund managers. As an SEO Partner, your firm is invited to display the SEO Diversity Partner logo on its website and promotional materials to indicate the firm’s ongoing commitment to increasing diversity in the alternative investments industry.

**How it Works**

- 1** **Sign on as a partner**  
Partnership levels listed below
- 2** Post open roles via a simple online form  
Active for 90 or fewer days if filled
- 3** SEO Alumni receive targeted email and text alerts about relevant postings based on their experience and professional interests
- 4** SEO shares resumes of interested and qualified candidates with partners
- 5** Partners advise SEO which candidates they will screen
- 6** Upon successful hiring, partner makes an additional support contribution to SEO



## Introducing SEO Protégé

The right guidance, at the right time, could have a huge impact on a young professional's life and career. **SEO Protégé** matches senior level professionals of all backgrounds with SEO alumni, or Protégés — who are just starting their careers — to provide the guidance they need at such a critical point in their lives.



### The Right Relationship Can Change Everything

Young professionals need access to senior leaders who can mentor and guide them and curate networks to help them further develop and propel them in their careers. Your years of experience can provide the valuable career insights and critical networks young professionals need to start their career strong.

Not only can you help them realize their potential personally and professionally, but you can be a trusted advisor to help them succeed.

**You can make that difference.**

### An Investment With A Great Return

As an experienced professional, you understand the world they're navigating, the decisions they face, and the transitions that will continue to challenge them — in both their workplaces and in their lives. This is your opportunity to invest in the next generation of leaders.

#### Are you ready?

We're looking for:

- Senior or executive-level professionals (10+ years' experience)
- Able to meet with a young professional once per quarter, including one in-person meeting
- Willing to invest in a young professional's success

#### What you'll receive:

- A substantive and rewarding experience that has the potential to change a life (including your own)
- A fulfilling and meaningful way to contribute to a more equitable society
- A curriculum, support from SEO, and a network of peers facilitated through SEO's Leadership Institute

### Matches are based on



Career and Shared Interests



Company / Roles / Industry



Professional / Personal Experiences



Life Goals

**You can invest in young leaders of color in a deep and personal way.** Can we count on you? Contact Kristina Cepeda, Program Manager at [kristina.cepeda@seo-usa.org](mailto:kristina.cepeda@seo-usa.org) for more information.

SEO Tech Developer

Are you determined to land an internship at a leading tech company or start up?

SEO Tech Developer, a **FREE** program for computer science majors, is here to help.

If you are a college sophomore who is Black, Latinx or Native American, get the technical training, internship access, and soft skills you need to **kickstart your career in tech.**

*\*SEO is a not for profit organization*



More than **85%** of participants landed internships



**WHAT YOU GET**

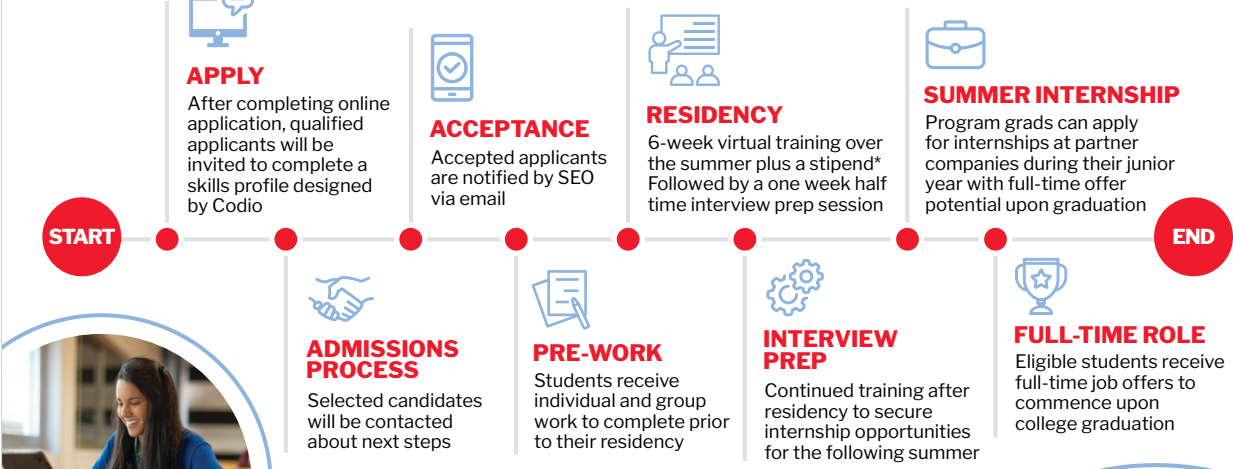
The opportunity to use a **variety of software tools**, practice different testing models, build programming skills not typically emphasized in school, and learn how developers think about putting pieces together.

- Summer residency stipend of \$6,000
- Curriculum developed and delivered by tech industry professionals
- Virtual summer residency
- Tech industry coaches and mentors
- Seminars led by senior tech executives and founders
- Tech industry interview prep, including mock interviews
- Partner Showcase presentations to learn more about internship opportunities
- Individual and group activities
- Premium LeetCode subscription for one year and access to prepaid [interviewing.io](https://www.interviewing.io) mock interview sessions
- LeetCode interviewing.io

**“This program gave me experience in so many new things and really put me in a great position to be successful. I’m grateful for the many resources provided to us, and all the knowledge and programming practice I’ve gained.”**

- Sierra A., College of William and Mary; Class of 2024

## How It Works



\*2023 will also be virtual

### WHO SHOULD APPLY

- ✓ Students who identify as Black, Latinx, or Native American
- ✓ Students enrolled as a sophomore at an accredited, four-year US college or university or two-year college with plans to transfer to a four-year institution in Fall 2023
- ✓ Computer Science, Computer Engineering, Statistics, Data Science, MIS, and other quantitative concentrations preferred; all majors considered; no minimum GPA
- ✓ Basic proficiency in one or more programming languages (Python, Java or C++)

Applications are considered on a rolling basis.

**There's no cost to participants.** The SEO Tech Developer is generously funded by our partners.



Set yourself up for tech success with the SEO Tech Developer.

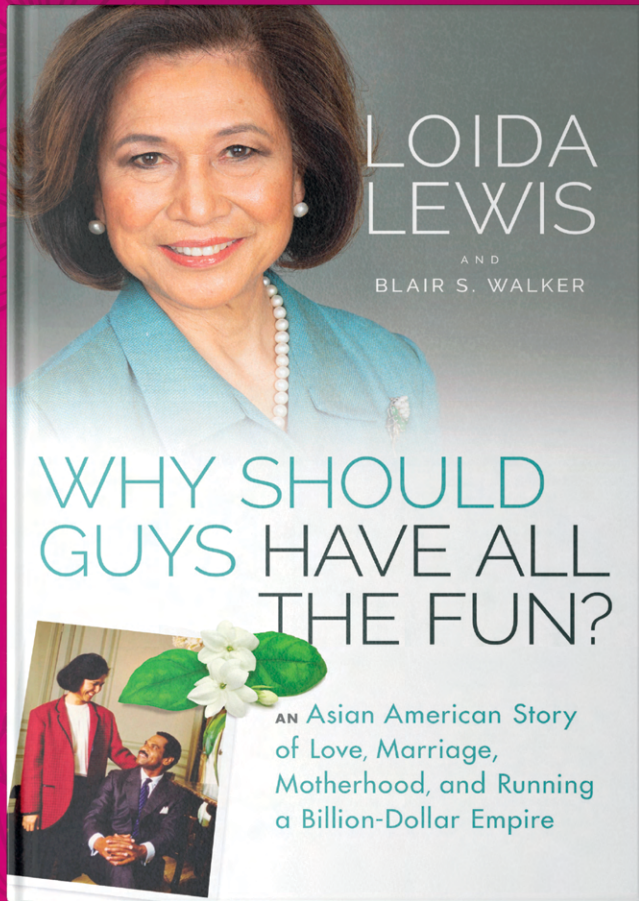
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A Working Mom's Journey  
from Aspiring Nun  
to Badass Global CEO**



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[Tiktok.com/@whyshouldguys](https://www.tiktok.com/@whyshouldguys)





## Tuesday, April 25, 2023

The New York Hilton Midtown, New York City  
1335 Avenue of the Americas (between 53rd & 54th streets)

6:00 p.m. Cocktails | 7:00 p.m. Dinner & Program | Cocktail Attire

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President  
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14<sup>TH</sup> Annual

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Alternative  
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## SEO Alternative Investments

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