15TH Annual

SEO AICON

Alternative Investments Conference

Henry R. Kravis, Co-Founder & Co-Executive Chairman, KKR and SEO Board Chairman, and Adebayo Ogunlesi, Founding Partner, Chairman & Chief Executive Officer, Global Infrastructure Partners

Conference Programming

SEO Alternative Investments

Thursday, March 14, 2024

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 in the alternatives sector.

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

The conference is part of the SEO Alternative Investments program and plays an integral role in SEO's pioneering work. It builds upon SEO's 60+ year history of supporting talented and motivated young people gain access to educational and career opportunities.

Limited Partner Leadership Breakfast

Welcome
William Goodloe**
President & CEO
SEO

Kelly Williams
Chief Executive Officer
The Williams Legacy Foundation
LPAC Chair

Introduction
Yokasta Segura-Baez
Managing Director, Investor Relations
ArcLight Capital Partners

Fireside Chat
Daniel Revers
Founder & Managing Partner
ArcLight Capital Partners

Fireside Chat
Melissa Ding
Director, Infrastructure Private Equity
BlackRock

General Conference

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

Fireside Chat
Les Brun
Co-Founder, Chairman & Chief Executive Officer
Ariel Alternatives

SEO RFL Award Presenter
Christina Lewis
Founder
BFO21
Vice Chair
Reginald F. Lewis Foundation

SEO RFL Award Recipient
Deborah L. Harmon**
Co-Founder & Co-Chief Executive Officer
Artemis Real Estate Partners

Fireside Chat
Cheryl Mills
Founder & Chief Executive Officer
Blacklvy Group

Fireside Chat
Kunle Apampa
Director
Capricorn Investment Group

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

AI Demonstration
Jens Nordvig, PhD
Co-Founder and CEO
MarketReader

Moderator
Don Cornwell
Co-Founder and Chief Executive Officer
Dynasty Equity

Emcee
Damali Bond*
Partner
PJT Park Hill

* indicates SEO Alumnus ** indicates SEO Board Member

Dear Friends,

Greetings to all those gathered today for the 15th Annual Alternative Investments Conference hosted by the SEO. Since 1963, SEO has organized training and internship programs and helped young people seek opportunities for service and success.

Congratulations are due to this year's honoree: Deborah L. Harmon, Co-founder and Chief Executive Officer of Artemis Real Estate Partners and SEO Board Member, and SEO LPAC Member. Her leadership, service and accomplishments are worthy of your recognition.

Committed to creating opportunities for the next generation, SEO offers mentoring, academic assistance and specialized training. The Conference brings together talented young professionals from diverse backgrounds with leading experts in private equity, hedge funds and other asset classes to explore strategies, reflect on recent challenges and share ideas.

The groundwork for the Conference begins years earlier with SEO's innovative efforts to prepare secondary school students for success in higher education. The SEO Scholars initiative helps low-income public high school students earn acceptance to college and arrive ready to succeed. The dedicated officers, board, staff and supporters of SEO are 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 those attending SEO's 15th 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 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 professionals."

Dear Friends,

Welcome to SEO's 15th Annual Alternative Investments Conference. Our goal is to help both young and experienced professionals understand the different elements 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 ArcLight Capital Partners, Kirkland & Ellis, KKR and Siris, our Conference Underwriting Sponsors. Added thanks to Bank of America, Grain Management, Oaktree, Ropes & Gray and Weil, Gotshal & Manges, our Exhibiting Sponsors.

In 2009, SEO launched its Alternative Investments Fellowship Program (AIFP) with the wholehearted commitment of partners KKR and TPG. Since then, the AIFP has grown to the 65+ 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 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 AICON

SEO Alternative Investments is excited to share the launch of the following programs:

Founding Partners

Credit Academy

The SEO Credit Academy is designed to prepare young professionals to secure credit investment roles by providing education on the sector, and events with SEO partners.

Blackstone · DavidsonKempner Capital Management LP · HPS Investment Partners · OHA Oak Hill Advisors · Sixth Street

Endowments and Foundations (E&F) Fellowship Program

SEO's Endowments & Foundations (E&F) Fellowship program assists young professionals working in investment banking, consulting, equity research, and other finance-related fields in finding career paths working at an E&F institution.

The James Irvine Foundation

Sponsors

Catalyst Sponsor

TPG

Underwriting Sponsors

Arclight, Kirkland & Ellis, KKR, Siris

Exhibiting Sponsors

Bank of America, Grain Management, Oaktree, Ropes & Gray, Weil

Presenting Sponsors

Artemis, Avance, The Baupost Group, Blackstone, GH&A Garcia Hamilton & Associates, L.P., GCM Grosvenor, Valor Equity Partners

Premier Sponsors

ae Industrial Partners, Argand Partners, Avant Bio, BenchStrength, BlackRock, Cerberus, CVC Capital Partners, DPI Development Partners International, DigitalBridge, Dynasty Equity, Hamilton Lane, HarbourVest, KPS Capital Partners, LP, KSL Capital Partners, Neuberger Berman, Warburg Pincus

Leadership Sponsors

645 Ventures, Adams Street, Ariel Alternatives, Brightwood, Lexington Partners, StepStone

Supporting Sponsors

Chronograph, PJT Park Hill

General Sponsors

Avenue Growth Partners, Berkshire Partners, Bharcap Partners, Blantyre Capital, Canyon Partners, LLC, Cohere Capital, Elizabeth Park Capital Management, Headlands Capital, Heard Capital, Sculptor Capital Management, Trident

Diversity Friends

Aksia, Amity Search Partners, Auquan, Blue Owl, Eden Capital, Fairview, generation, Great Hill Partners, Henkel Search Partners, m2, Odyssey Search Partners, Pathway Capital Management, Recast Capital, Row Asset Management, Teca Partners

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Partners

Marketing Partners

aaaim, Accelerate Investors, GCM Grosvenor, MLT, naic National Association of Investment Companies, PeWIN

Alternative Investments Fellowship Program (AIFP) Partners

abry partners, AEA, American Pacific Group, American Securities, Apollo, Aurora Capital Partners, Bain Capital, The Baupost Group, BDT Capital Partners, Berkshire Partners, BlackRock, Blackstone, Bregal Sagemount, Brookfield, The Carlyle Group, Capital, Centerbridge, Charlesbank, CIM, Clayton Dubilier & Rice, Clearlake Capital, CVC Capital Partners, DavidsonKempner Capital Management LP, DE Shaw & Co, DigitalBridge, Genstar Capital, Global Infrastructure Partners, Golden Gate Capital, Goldman Sachs, GTCR, Harvest Partners, H.I.G. Capital, ICG, KKR, Kohlberg & Company, KSL Capital Partners, L Catterton, Lexington Partners, LGP, Morgan Stanley, NEP Norwest Equity Partners, Odyssey, OFS, Palladium, Permira, Providence Equity, RCP Reverence Capital Partners, Rubicon Founders, Searchlight, Silver Lake, Sixth Street, Stonepeak, Summit Partners, TA Associates, TJC, Thoma Bravo, THL Thomas H. Lee Partners, TPG, Wafra, Warburg Pincus, WCAS, Wellspring Capital Management LLC

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

Crestview, Gryphon Investors

Alpha Academy Partner

Select Equity

Credit Academy Partners

Blackstone, DavidsonKempner Capital Management LP, HPS Investment Partners, OHA Oak Hill Advisors, Sixth Street

Endowments & Foundations Fellowship

The James Irvine Foundation

8:00am - 9:15am — LP Breakfast

Sponsored by:
ARCLIGHT

Welcome

William Goodloe**
President & CEO
SEO

Kelly Williams
Chief Executive Officer
The Williams
Legacy Foundation

LPAC Chair

Introduction

Yokasta Segura-Baez
Managing Director,
Investor Relations,
ArcLight Capital Partners

Fireside Chat

Daniel Revers
Founder &
Managing Partner
ArcLight Capital Partners

Melissa Ding
Director, Infrastructure
Private Equity
BlackRock

8:30am — General Registration Begins

9:30am - 10:20am — Plenary Session

Sponsored by:
Ariel Alternatives
KKR

Fireside Chat

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

Les Brun
Co-Founder, Chairman &
Chief Executive Officer
Ariel Alternatives

10:20am - 10:35am — General Welcome

Welcome
William Goodloe**
President & CEO
SEO

Emcee
Damali Bond*
Partner
PJT Park Hill

Thursday, March 14, 2024 Agenda (All times listed ET)
SEO AICON

10:45am - 11:35am — Breakout Panels (I)

Credit: Manager Investment Insights (Breakout Room 1)

Scan the QR Code for more details

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.

Sponsored by: Brightwood, cerberus, DigitalBridge, Oaktree

Moderator:
Jeremy Bailys, Senior Director, Credit Investments, PSP Investments

Panelists:
Megan Messina, Managing Director and Head of CLO Capital Markets, Oaktree Capital Management
Chris Moon, Managing Director, DigitalBridge
Allison Pistone, Managing Director, Cerberus Capital Management
Merle Smith, Director, Brightwood Capital

The Hedge Fund Investment Landscape (Breakout Room 2)

Scan the QR Code for more details

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.

Sponsored by: BlackRock, Elizabeth Park Capital Management, Heard Capital, Teca Partners

Moderator:
Neil Messing, Head of Hedge Funds, Office of the New York City Comptroller

Panelists:
Fred Cummings, President, Founder & Portfolio Manager, Elizabeth Park Capital Management
Nikhil Gadia, Director, BlackRock
Priya Kaftan, Head of Investor Relations & Product Strategy, Heard Capital
Fernando Vigil*, Chief Investment Officer & Founder, Teca Partners

Private Equity: Navigating & Innovating for Alpha (Breakout Room 3)

Scan the QR Code for more details

In 2023, the Private Equity industry remained resilient in the face of macro uncertainty, geopolitical instability, and inflation. Then miraculously we emerge into 2024 with economic strength despite being faced with many of the same risks. Our panelists discuss how they are thinking about managing their portfolios, innovating their business, and share insights on how they see the industry evolving to adapt to the dynamic nature of today's global economy.

Sponsored by: Argand Partners, ae Industrial Partners, CVC, Kirkland & Ellis, Neuberger Berman, Valor

Moderator:
Patricia Miller Zollar, Managing Director, Neuberger Berman

Panelists:
Charlie Compton, Managing Partner, AE Industrial Partners
Heather Faust, Managing Partner & Co-Founder, Argand Partners
Joseph Haslip, Managing Director, Valor Equity Partners
Aisha P. Lavinier, Partner, Kirkland & Ellis
Omar Shalaby, Managing Director, CVC Capital Partners

10:45am - 11:35am — Breakout Panels (I)

Unlocking the Future: Exploring the Intersection of Artificial Intelligence and Investing (Breakout Room 4)

Advances in artificial intelligence are having a massive impact across all industries, and creating an unprecedented investment opportunity as well as significant risks. This panel will examine how the impact artificial intelligence is having across the investment landscape.

Sponsored by: BENCHSTRENGTH, Chronograph, FAIRVIEW

Moderator:
Kwesi Quaye, Partner, Fairview Capital

Panelists:
Margot Brandenburg, Senior Program Officer, Mission Investments, Ford Foundation
Kenneth Chenault Jr, Co-Founder & Managing Partner, Benchstrength
John Kim, Managing Director, Investor Relations & Chief Development Officer, General Catalyst
Charlie Tafoya*, Co-Founder & Chief Executive Officer, Chronograph

Scan the QR Code for more details

11:45am - 12:35pm — Breakout Panels (II)

Sustainable Investments (Breakout Room 1)

This panel will explore the role of alternatives in sustainable investing and the prominent approaches (SRI, ESG-themed, and impact investments). The panelists will discuss how they navigate the environment in different political landscapes and the trends they foresee.

Sponsored by: DPI Development Partners International, KIRKLAND & ELLIS

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

Panelists:
Runa Alam, Co-Founder and CEO, Development Partners International
Michaela Edwards, Partner, Capricorn Investment Group
Sofia Martos, Partner, ESG & Impact, Kirkland & Ellis
Sayiddah McCree, Senior Impact Investments Officer, MacArthur Foundation

Scan the QR Code for more details

The Future of Retail Alternatives (Breakout Room 2)

This panel will explore the democratization of alternative investments with a focus on asset distribution, advances in technology systems, and the different ways retail access is emerging in this space.

Sponsored by: BANK OF AMERICA

Moderator:
Dakotah Rice*, Founder & CEO, CaliberX

Panelists:
Milton Berlinski, Co-Founder & Managing Partner,** Reverence Capital Partners
Clauter Charleston, Director, Bank of America
Peter Epstein, Managing Director, Allocate

Scan the QR Code for more details

11:45am - 12:35pm — Breakout Panels (II)

Alternative Investment Allocation in the Insurance Industry (Breakout Room 3)

Increasingly, Alternative Investments are an important tool for insurance companies to meet their investment and asset/liability matching objectives. While the industry continues to enhance internal skills in this space, it also relies on leading Alternatives managers to help optimize for the best combination of investment opportunity and prudent risk management.

Sponsored by: ROPES & GRAY

Moderator:
Ramsey Smith *, Founder,** ALEX.fyi

Panelists:
Jessica Marlin, Partner, Ropes & Gray
Craig Sabal, Deputy Chief Investment Officer, New York Life Insurance Company
Mike Siegel, Global Head of Insurance Asset Management & Liquidity Solutions, Goldman Sachs Asset & Wealth Management
Adam Winn, Executive Managing Director, Co-Head of Global Private Investments, Liberty Mutual Investments

Scan the QR Code for more details

Exploring the Frontiers of Secondary and Co-investment Strategies (Breakout Room 4)

This panel discussion aims to unravel the intricacies of Secondary investments and Co-investments, shedding light on their position within the alternative investment spectrum and their evolving market dynamics. Through expert insights, we will examine the current landscape, risk management, and the future potential of these strategies, offering attendees a comprehensive overview of the opportunities and challenges that lie ahead in these dynamic sectors of the investment world.

Sponsored by: Adams Street, HarbourVest, Lexington Partners, TPG, Weil

Moderator:
Trey Muldrow, Partner, Weil, Gotshal & Manges

Panelists:
Elliot Campbell*, Principal, HarbourVest Partners
Omar Jabri, Managing Director, Lexington Partners
Marcus Lawrence, Principal, TPG Next
Michael Taylor, Partner, Co-Investments, Adams Street Partners

Scan the QR Code for more details

12:45pm - 1:05pm — Lunch & SEO Reginald F. Lewis Award

Introduction
William Goodloe**
President & CEO
SEO

Presented By
Christina Lewis
Founder
BFO21
Vice Chair
Reginald F. Lewis Foundation

Presented To
Deborah L. Harmon**
Co-Founder & Co-Chief Executive Officer
Artemis Real Estate Partners

1:05pm - 1:45pm — Fireside Chat

Sponsored by:
ARTEMIS

Deborah L. Harmon**
Co-Founder & Co-Chief Executive Officer
Artemis Real Estate Partners

Cheryl Mills
Founder & Chief Executive Officer
BlackIvy Group

1:45pm - 2:25pm — Plenary Session

Sponsored by:
TPG

Shaping the Future: Unlocking the Potential of Impact Investing

Kunle Apampa
Director
Capricorn Investment Group

Maya Chorengel**
Co-Managing Partner
The Rise Fund

2:25pm - 2:40pm — AI Demonstration

Jens Nordvig, PhD
Co-Founder and CEO
MarketReader

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2:50pm - 3:40pm — Breakout Panels (III)

Breaking into the Buyside (Breakout Room 1)

Scan the QR Code for more details

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.

Sponsored by: AMITY, Henkel Search Partners, Odyssey Search Partners, Warburg Pincus

Moderator:
Martha Masiarz, Director, Odyssey Search Partners

Panelists:
Rahel Ayalew, SVP of Investor Relations, Thoma Bravo
Claire Branch, Vice President, Warburg Pincus
Stacy Levine, Partner, Amity Search Partners
Nellie McCullough, Principal, Henkel Search Partners

How Successful Real Estate Investors Are Approaching the Market in 2024 (Breakout Room 2)

Scan the QR Code for more details

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.

Sponsored by: Artemis, GCM Grosvenor, Ropes & Gray

Moderator:
Ermias Nessibu, Principal, GCM Grosvenor

Panelists:
Margaret Anadu, Senior Partner, The Vistria Group
Anar Chudgar, Co-President, Artemis Real Estate Partners
Nicole Krea, Partner, Ropes & Gray
Caixia Ziegler, Managing Director, Real Assets & Sustainable Investments, MacArthur Foundation

Navigating the Landscape: Challenges and Opportunities for Emerging Managers (Breakout Room 3)

Scan the QR Code for more details

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.

Sponsored by: Avance, Avant Bio, Hamilton Lane, m²

Moderator:
Katie Moore, Managing Director, Hamilton Lane

Panelists:
Daniella Kranjac, Founding GP, Avant Bio
David Perez, Co-Founder & Managing Partner, Avance Investment Management
André Rice, President, Muller & Monroe Asset Management
Michael Silva, Investment Officer, CalPERS

2:50pm - 3:40pm	**Breakout Panels (III)**
Scan the QR Code for more details	**Understanding the Impact of Analysts / Associates in Endowments and Foundations (Breakout Room 4)** This panel will provide transparency on the distinction between the responsibilities of analysts & associates and those of senior staff in the process of making portfolio investment decisions working at an E&F. Sponsored by: GRAIN Moderator: **Kathlika Fontes, Director, Investor Relations,** Grain Management Panelists: **Anise Charles, Senior Investment Analyst,** Ford Foundation **Justin Glover, Public Markets Investment Analyst,** Robert Wood Johnson Foundation **Antonio Guirola, Analyst,** Penn Office of Investments **Carlton Lew, Investment Associate,** The James Irvine Foundation
3:50pm - 4:40pm	**Plenary Session**
Sponsored by: DYNASTY EQUITY	Diversity and Inclusion in Sports Management and Investment
4:45pm - 6:00pm	**Networking Cocktail Reception** Sponsored by: TPG
All Day	**Networking & 1:1 LP/GP Meetings**

Moderator
Don Cornwell
Co-Founder and Chief Executive Officer
Dynasty Equity

Lara Price
Chief Operating Officer
Philadelphia 76ers

Jasmine Robinson
Managing Partner
Monarch Collective

Welcome Speaker
William Goodloe**
President & CEO
SEO

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

During William's tenure, the number of young people impacted by SEO annually has grown to 7000+ per year – 900% increase. During that period SEO's annual budget has increased by over $40 million, while SEO has developed an excellent reputation for preparing young talent to succeed at competitive colleges and in sought-after careers.

Previously, William was Executive Director of Inner-City Scholarship Fund and Vice President of the Center for Youth Development. He began his career in advertising and sales management, including positions with Procter & Gamble and Corning Inc.

William is a trustee of the Altman Foundation and Partnership Schools. He previously served on an advisory board for the Federal Reserve Bank of NY and was appointed to citywide education task forces by two NYC Mayors. William received his MBA from Columbia Business School and his B.S. from American University.

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

Henry Kravis (New York) co-founded KKR in 1976 and serves as its Co-Executive Chairman. Prior to his current position, he was Co-Chief Executive Officer until 2021. He is actively involved in managing the Firm and serves on each of the regional Private Equity Investment Committees. Mr. Kravis currently serves on the boards of Axel Springer and ICONIQ Capital, LLC. He also serves as a director, chairman emeritus, or trustee of several other cultural, professional, and educational institutions, including The Business Council (former chairman), Claremont McKenna College, Columbia Business School (co-chairman), Mount Sinai Hospital, the Partnership for New York City (former chairman), the Partnership Fund for New York City (founder), Rockefeller University (vice chairman), SEO (chairman), and the Tsinghua School of Economics and Management in China. He earned a B.A. from Claremont McKenna College in 1967 and an M.B.A. from the Columbia Business School in 1969. Mr. Kravis has more than four decades of experience financing, analyzing, and investing in public and private companies, as well as serving on the boards of a number of KKR portfolio companies.

Les Brun

Co-Founder, Chairman & Chief Executive Officer

Ariel Alternatives

Les Brun is Founder, Chairman and Chief Executive Officer of Ariel Alternatives, LLC, where he also chairs the Investment Committee. He has over 42 years of investment banking, commercial banking and financial advisory experience, including as Founder and Chairman Emeritus of Hamilton Lane, a leading global private markets investment management firm.

In addition to his role at Ariel Alternatives, Les is Chairman and Chief Executive Officer of Sarr Group, LLC, a diversified holding company for his personal investments. He is currently Lead Director of Broadridge Financial Solutions, Inc. (NYSE: BR) and serves on the Board of Directors of Corning, Inc. (NYSE: GLW) and on the Advisory Board of Guardian Capital Partners GP, LP. He is also a Senior Advisor to G100 and World 50, a private platform of peer-to-peer communities for senior executives and directors from some of the world's largest companies, and an advisor in Bank of America's Enterprise Executive Development Program, where he helps coach and develop executives. Les serves as a Member of the Council on Foreign Relations.

Les has extensive experience as a corporate director and was formerly Lead Director of Merck & Co., Inc. (NYSE: MRK), Chairman of the Board of Directors of CDK Global, Inc. (NASDAQ: CDK), Chairman of the Board of Directors of Automatic Data Processing, Inc. (NYSE: ADP), and Chair of the Compensation Committee of Hewlett Packard Enterprise (NYSE: HPE). He was a board member of the Richcourt Group, a Hamilton Lane company specializing in hedge fund of funds management. In addition, he was Chairman of the U.S. Small Business Administration SBIC Advisory Council, and a member of the Committee for the Reinvention of the Small Business Administration (SBA).

Les holds a BS from the State University of New York at Buffalo, where he has been recognized as a Distinguished Alumnus. Les was previously named by the NACD as one of America's top 100 Corporate Directors and was inducted into the 2019 Business Hall of Fame for Philadelphia Inquirer's Industry Icons.

Speaker Biographies

SEO AICON

Eric Doppstadt

Vice President & Chief Investment Officer

Ford Foundation

Eric Doppstadt is vice president and chief investment officer of the 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 director of Arch Capital Group, Ltd., Harvard Management Company, and Makena Capital Management, LLC.

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. He also holds the CFA (chartered financial analyst) designation from the CFA Institute.

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.

Kelly Williams

Chief Executive Officer

The Williams
Legacy Foundation

LPAC Chair

Ms. Williams is the CEO of The Williams Legacy Foundation. Ms. Williams is a recognized leader in the alternative investment industry having founded the Customized Fund Investment Group (CFIG) at The Prudential Insurance, which grew to over $30 billion before she led its sale in 2014. Ms. Williams was an associate with Milbank, Tweed, Hadley & McCloy specializing in project finance before Prudential.

Ms. Williams is a Board Director and Nominating and Governance Committee Chair of The Greenbrier Companies (GBX). She also serves on the Board of Trustees of The National Philanthropic Trust, where she serves as chair of its Nominating and Governance Committee.

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

Ms. Williams has received many awards throughout her career in the financial services industry and was named as one of The Most Powerful Women in Finance by American Banker Magazine 2011 - 2014. Her family has lived in the Hudson Valley of New York for over 400 years. She graduated magna cum laude from Union College in Schenectady, NY in 1986 and received her Juris Doctor from New York University School of Law in 1989. She and her husband, Andrew Forsyth, live in Palm Beach, FL and Nantucket, MA.

Yokasta Segura-Baez

Managing Director, Investor Relations

ArcLight Capital Partners

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. Segura 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.

Daniel Revers

Founder & Managing Partner

ArcLight Capital Partners

Mr. Revers is the founder of ArcLight and has over three decades of energy finance and private equity experience. Mr. Revers is responsible for overall investment, asset management, strategic planning, and operations of ArcLight and its funds. Prior to forming ArcLight in 2000, Mr. Revers was a Managing Director in the Corporate Finance Group at John Hancock Financial Services, where he was responsible for the origination, execution, and management of a $6 billion portfolio consisting of debt, equity, and mezzanine investments in the energy industry. Prior to joining John Hancock in 1995, Mr. Revers held various financial positions at Wheelabrator Technologies, where he specialized in the development, acquisition, and financing of domestic and international power and energy projects. Mr. Revers earned a Bachelor of Arts in Economics from Lafayette College and a Master of Business Administration from the Amos Tuck School of Business Administration at Dartmouth College.

Melissa Ding

Director, Infrastructure Private Equity

BlackRock

Melissa Ding is Head of the Americas for BlackRock's Infrastructure Solutions team. In her role, Ms. Ding is responsible for originating, underwriting, executing, and managing infrastructure private equity primary, secondary, and direct investment opportunities in the Americas region. Ms. Ding earned a Bachelor of Arts in Public and International Affairs from Princeton University, where she graduated magna cum laude and was a member of Phi Beta Kappa.

Damali Bond*

Partner

PJT Park Hill

Damali Bond is a Partner in PJT Park Hill's Alternative Credit/Hedge Funds distribution group, based in New York. Damali has over 20 years of experience in the alternative asset and financial services industry. In her current role, Damali covers a range of institutional investors across the United States. Prior to joining Park Hill in 2011, Ms. Bond spent five years at Morgan Stanley and held various roles across both Investment Management and the Institutional Securities Group. Ms. Bond received a BA in Economics from Spelman College, graduating Cum Laude and an MBA from Harvard Business School. Damali is an alum of the SEO Career program 2001 and was part of the inaugural junior leadership board in 2013.

Christina Lewis

Founder
BFO21

Vice Chair
Reginald F.
Lewis Foundation

Christina Lewis is an entrepreneur, investor, philanthropist, ecosystem-builder, writer, and podcast host who is passionate about using creativity and perseverance to empower people to live their best lives and be a positive force in the world. She is the Founder of BFO21, a wealth management firm, and Vice Chair of the Reginald F. Lewis Foundation. Christina is also the Executive Producer of "Why Should White Guys Have All the Fun?" (WSWG), a feature film based on the life of her father, Reginald F. Lewis. That film is currently in development led by Charles King of MACRO.

Previously, Christina was Founder and Acting CEO of Giving Gap (formerly Give Blck) a nonprofit database of Black-Founded charities which she conceptualized in June 2020 and shepherded to becoming a nationally-recognized platform that has channeled over $2.7 million dollars to Black causes around the United States, receiving major grants from Microsoft, Ford Foundation, Gates Foundation and Goldman Sachs.

Christina's work has been featured by the Obama Whitehouse, Inc., The New York Times, Wall Street Journal, PBS, and Fortune.

In the early years of her career Christina was a professional journalist, and spent five years at the Wall Street Journal, covering design, luxury homes and commercial real estate. Her first full-time job was as a police reporter for The Stamford Advocate where she won an investigative journalism award for an in-depth report about unfair practices around police-involved car accidents.

Christina graduated from Harvard College with an A.B. in French and American History & Literature. She currently lives in New York City with her husband and three wonderful children.

Deborah L. Harmon**

Co-Founder & Co-Chief Executive Officer

Artemis Real Estate Partners

Ms. Harmon, Co-Founder and Co-Chief Executive Officer of Artemis Real Estate Partners, is an industry leader and entrepreneur with more than 30 years of experience in real estate. Ms. Harmon, along with Penny Pritzker, co-founded Artemis Real Estate Partners in 2009. She has oversight responsibility for the firm, establishing and managing the firm's strategic direction.

Prior to co-founding Artemis, Ms. Harmon spent 17 years establishing and leading the principal investing business at J.E. Robert Companies, Inc., a global real estate investment firm where she was President and Chief Investment Officer from 1997 until her departure in 2007.

Ms. Harmon currently serves as Chairperson of the Pension Real Estate Association Foundation, a member of the Board of Directors of Starwood Property Trust, Urban Alliance, and SEO. In addition, Ms. Harmon is a leader and former trustee of the Urban Land Institute, and a member of the Advisory Boards of Park Madison Partners and the BlackIvy Group. She also serves on the Advisory Council for the NYU Stern Center for Business and Human Rights and as a member of the Council on Foreign Relations.

Ms. Harmon was previously appointed by President Obama to serve as a Commissioner for the White House Fellows program and was a member of the Board of Directors for Forest City Enterprises [NYSE: FCE] and Avis Group Holdings [NYSE: AVI]. She previously served on the Board of the Pension Real Estate Association and on the Board and Executive Committee of Women for Women International.

Ms. Harmon also has served on the Advisory Board for the Johns Hopkins School of Advanced International Studies, and the Boards of Trustees for The Sidwell Friends School, The National Cathedral Elementary School, and The National Children's Research Center in Washington, D.C.

Ms. Harmon was recognized in 2020 by Barron's on its inaugural list of the 100 Most Influential Women in U.S. Finance, and was recognized by EY as an Entrepreneur of the Year® 2019 Mid-Atlantic Award winner and National Finalist. She was included in Real Estate Forum's Women of Influence Hall of Fame in 2018.

Ms. Harmon earned a Bachelor of Arts degree from Johns Hopkins University and a Master of Business Administration from The Wharton School of the University of Pennsylvania.

Cheryl Mills

Founder & Chief Executive Officer

BlackIvy Group

Cheryl Mills is founder and Chief Executive Officer of the BlackIvy Group. Prior to BlackIvy, Ms. Mills served as Chief of Staff to Secretary Hillary Clinton and Counselor to the U.S. Department of State, where she managed foreign policy and operational priorities of the $55 billion agency that employs more than 20,000 officials across 180 countries. She supervised priority policy areas, including the Obama Administration's $3.5 billion global hunger and food security initiative spanning 19 countries, 12 in Africa, and diplomacy and development efforts in Haiti.

From 2002 – 2008, Ms. Mills served as Senior Vice President for Administration and Operations as well as General Counsel at New York University, one of the nation's largest private universities, where she negotiated the structure, framework, terms and conditions for the establishment of the University's campus in Abu Dhabi.

Kunle Apampa

Director

Capricorn Investment Group

Kunle Apampa is a Director on the Client Solutions Team and Head of Client Solutions & Partnerships. He joined the firm in 2021.

Prior to Capricorn, Kunle was Vice President at Goldman Sachs Imprint, an ESG & Impact Investment platform within Goldman Sachs Asset Management.

Kunle holds a BSc in Chemical Engineering, specializing in Energy, Environment & Economics, from the Illinois Institute of Technology in Chicago.

Maya Chorengel**

Co-Managing Partner

The Rise Fund

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

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

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

Jens Nordvig, PhD

Co-Founder and CEO

MarketReader

Jens was previously a Managing Director at Goldman Sachs, a Senior Investment Associate at Bridgewater and Head of Fixed Income Research at Nomura Securities. Jens founded Exante Data in 2016 and oversaw its growth into a leading supplier of data-driven macro strategy for institutional investors globally. He co-founded AI market analytics firm MarketReader in 2021. Jens earned his PhD from the University of Southern Denmark.

Don Cornwell

Co-Founder and Chief Executive Officer

Dynasty Equity

K. Don Cornwell is Dynasty Equity's Co-Founder and Chief Executive Officer.

Prior to Dynasty Equity, Don was a Founding Partner at PJT Partners, a premier global advisory-focused investment bank. In January 2023, Don became a member of the Board of Directors of PJT Partners. Don joined PJT Partners in 2015 following an 18-year career at Morgan Stanley. At Morgan Stanley, Don was in the Mergers and Acquisitions Group and established a particularly focused area of expertise in media and entertainment, specifically in sports and gaming. Prior to leaving Morgan Stanley he served as Head of Global Sports Investment Banking.

Don has worked on some of the largest and most complex sports and entertainment deals in the industry, including the sale of Maple Leaf Sports & Entertainment, the sale of the Buffalo Bills, the sale of IMG to William Morris Endeavor, the sale of Access/DAZN owned Perform Group to Vista owned STATS Inc., a recapitalization of the Pittsburgh Steelers, and the formation of Major League Baseball Advanced Media. In addition, he has served as a strategic advisor to the National Football League and the National Basketball Association on numerous occasions.

Don has also worked on several transformational transactions in the gaming space including the combination of Flutter Entertainment and The Stars Group, the sale of Caesars Entertainment to Eldorado Resorts, the acquisition of Sky Betting and Gaming by The Stars Group, the formation of a US sports betting joint venture between MGM Resorts and GVC, and the acquisition of Double Down Casino by IGT.

Prior to Morgan Stanley, Don worked at McKinsey & Co. as a management consultant and in corporate development for the National Football League. He sits on the Board of Trustees of the Harlem Children's Zone, an education and social services organization in Central Harlem; the East Harlem Tutorial Program, an after-school program for children in East Harlem; the Board of Directors of New York Cares, New York City's largest volunteer organization; and the VFILES Foundation, an organization with the mission to increase business ownership for creators in underrepresented communities.

Don received an MBA from Stanford University's Graduate School of Business and an AB in Government from Harvard College. Don served on the Management Board of Stanford University's Graduate School of Business until July 2022.

Speaker Biographies
SEO AICON

Lara Price

Chief Operating Officer

Philadelphia 76ers

In her position as Chief Operating Officer, Lara Price oversees the Philadelphia 76ers Business Operations including development and the community engagement arms for one of the National Basketball Association's most storied franchises. She is one of the highest-ranked women in the NBA with more than 25 years of experience. Price is the 76ers' primary intermediary with the league office and the key liaison between the business and basketball arms of the organization.

She played a critical role in the formation of Harris Blitzer Sports & Entertainment and leads operations and communications between the venture's sports and entertainment properties, including the New Jersey Devils (NHL) and Prudential Center, a top-seven ranked performance venue in the U.S., located in Newark, New Jersey. Price was a leader in developing the Philadelphia 76ers Training Complex located in Camden, New Jersey. The 150,000-square-foot facility is home to the 76ers basketball and business operations, and the largest and most technically advanced training facility in professional sports.

In her position, Price serves as an ambassador between the 76ers organization and the City Municipalities of Philadelphia and Camden. Among her responsibilities, Price additionally oversees the operation of the Delaware Blue Coats, the 76ers NBA G League affiliate and the development and construction of the team's 120,000-square-foot arena, training complex and community sports center, the 76ers Fieldhouse, in Wilmington, Delaware. In 1998, Price became one of the first female Vice Presidents in the NBA.

She has collected numerous awards throughout her career including being named as one of Adweek's "Most Powerful Women in Sports," Philadelphia Business Journal's "Women of Distinction," Sports Business Journal's "Game Changers" and named NAWBO South Jersey's "Trailblazer of the Year." In addition, Price is an honoree of the Women in Sports & Events (WISE) Woman of the Year Award, recognizing female leaders who have made a significant impact in the business of sports.

Price currently sits on the board for the Sixers Youth Foundation and is chairman, President of Wilt Chamberlain Memorial Fund. She is an active board member of the Police Athletic League, where she also retains a seat on the Education and Finance Committees. In addition, Price is a member of the Board of Trustees for the Camden Health and Athletic Association and the Philadelphia Sports Advisory Board. Price joined the 76ers in 1996 as Director of Marketing after serving as Manager of Team Services for the NBA. She also served as Director of Team Services for the Continental Basketball Association.

A native of Boulder, Colorado, Price is a graduate of Colorado State University where she was a member of the women's basketball team. Price currently resides in suburban Philadelphia.

Jasmine Robinson

Managing Partner

Monarch Collective

Jasmine is Managing Partner at Monarch Collective, a fund investing in women's sports teams, leagues, and rights. Prior to Monarch, Jasmine was a Partner at Causeway, a growth stage fund investing in sports, media, gaming and fitness. While at Causeway, Jasmine partnered with companies including Tracksmith, Niantic, Volley, FloSports, and QuintEvents. Prior to Causeway, Jasmine held investing and strategy roles at the San Francisco 49ers, Bain & Company, and The Raine Group. Jasmine received her BA from Harvard University, graduating Magna Cum Laude, and her MBA from Stanford University where she was an Arjay Miller Scholar

Runa Alam

Co-Founder and CEO

Development Partners International

Runa Alam is the co-founder and CEO of Development Partners International ("DPI"). DPI is a leading private equity firm investing throughout Africa, and manages over $3 billion in three funds, African Development Partners I ("ADP I"), ADP II and ADP III. ADP I and ADP II are Cambridge benchmarked top quartile Africa funds. The ADP funds have won numerous awards and been commended both for delivering top returns to investors while delivering top levels of ES&G and impact work. DPI is a gender balanced firm and seeks to focus its impact work on three buckets: Gender Balance, Climate Change, and Job Creation and Enhancement. ADP III also been chosen as the first "2X Challenge Gender Balance Showcase fund" by the OECD country development institutions.

Runa has decades of private equity, emerging market management and investment banking experience. She has invested in Africa for 24 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 EMPEA (the Emerging Markets Private Equity Association). 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.

Margaret Anadu

Senior Partner

The Vistria Group

Margaret Anadu is a Senior Partner at The Vistria Group where she heads Real Estate. She is based in New York City.

Margaret has devoted her career to investing which not only generates strong economic returns, but importantly has a demonstrable positive impact on underserved individuals, families, and communities. Margaret is widely recognized as one of the foremost experts on equitable access to capital having invested over $10 billion across hundreds of transactions throughout the United States and was named one of the most influential figures in U.S. commercial real estate by Commercial Observer.

Margaret has been a trusted advisor to many senior government officials at the federal, state, and local levels on utilizing private capital to create more equitable communities. As an experienced investor and thought leader on public-private partnerships, Margaret is often asked to share her views including on CNN, Bloomberg, CNBC and Yahoo Finance. She was named to 40 Under 40 lists by Fortune, Black Enterprise and Crain's.

Prior to joining Vistria, Margaret was a Partner at Goldman Sachs where she was the Global Head of Sustainability and Impact for Asset Management and Chair of the Urban Investment Group (GSUIG), the first impact investing platform at a major U.S. financial institution and Goldman Sachs' primary impact investing business. Under her leadership, GSUIG's portfolio was primarily comprised of real estate with a focus on workforce, affordable, and mixed-income housing, but also included investments in community facilities, educational space, industrial facilities, green infrastructure, student loans, and small businesses. Margaret ultimately grew the business to over $2 billion of investments annually.

While at Goldman Sachs, Margaret was the chief architect of the One Million Black Women investment strategy, the Firm's $10 billion capital commitment to narrow opportunity gaps for Black women in the United States and by extension their families and broader communities. In addition, during the COVID-19 pandemic, she led a $2 billion relief effort for small businesses.

In April 2022, Margaret was appointed chair of the board of directors of the New York City Economic Development Corporation. She also serves on the boards of the Low Income Investment Fund, the Center for an Urban Future, Smithsonian National Portrait Gallery, Planned Parenthood Federation of America, and the Africa Center. Margaret is a graduate of Harvard College and lives in Brooklyn, New York with her husband and two children.

Rahel Ayalew

SVP of Investor Relations

Thoma Bravo

Rahel Ayalew is a Senior Vice President of Investor Relations at Thoma Bravo. Based in New York, she joined the firm in 2023 to focus on fundraising and investor relations initiatives. Rahel leads investor relations efforts for the firm's credit business. Before Thoma Bravo, she was a Client Advisor in the Institutional Client Group at Neuberger Berman where she focused on business development for institutional investors across public and private market strategies. She also worked with a number of the firm's strategic partnership relationships. Rahel holds a BA in Economics from Bryn Mawr College.

Jeremy Bailys

Senior Director, Credit Investments

PSP Investments

Jeremy Bailys is a Senior Director at the Public Sector Pension Investment Board (PSP Investments Holding USA LLC). He joined the organization in August 2022 in the New York office. His primary responsibilities include origination, execution of investments and portfolio management.

Prior to joining PSP Investments, he spent 8 years at The Carlyle Group, where he was most recently a Principal in the Global Credit Group, and was responsible for structuring, financing and executing leveraged finance transactions for middle market financial sponsors. Prior to that, Jeremy began his career in investment banking at Wells Fargo Securities.

He holds a BSc and a Master's degree in Finance from the University of Florida.

Milton Berlinski

Co-Founder & Managing Partner

Reverence Capital Partners

Milton Berlinski co-founded Reverence Capital in June 2013 after concluding a 26-year career at Goldman Sachs, which he joined in 1986 and where he served as a founding member of the Financial Institutions Group in Investment Banking, focusing on banks, consumer and commercial finance companies, asset management, insurance and capital markets. He also served as Head of Strategy and Corporate Development in the period after Goldman Sachs' IPO, assisting the Executive Office and division leaders to create and execute a strategy to build out Goldman Sachs' global footprint. For the final 10 years of his Goldman Sachs tenure, Mr. Berlinski had global responsibility for coverage of the firm's financial sponsor and hedge fund clients, overseeing a dramatic increase in revenue from the business and working alongside Goldman Sachs' Merchant Banking team on co-investment opportunities in transactions involving the firm's clients.

Mr. Berlinski has led or executed over 250 transactions in financial services across all subsectors, including numerous strategic acquisitions by Goldman Sachs itself. Mr. Berlinski was also a member of the Operating Committee and the Compensation Committee during his time at the firm. He received a BA in engineering from California State University, Northridge, in 1978 and an MBA from the Wharton School of the University of Pennsylvania in 1980. Mr. Berlinski serves on the board of directors for Russell Investments, Venerable Holdings (HoldCo), Transact, Osaic (f/k/a Advisor Group), DMG Bancshares, Ministry Brands, CAIS, SEIA, and EverBank (f/k/a TIAA Bank). He formerly served on the board of directors for Kabbage, Diamond Resorts, and Victory Capital. He also serves on the Board of the Ronald McDonald House, the Advisory Board of the Wharton School and The Mount Sinai Department of Surgery Advisory Board. He is a Board Member of the New America Alliance, supporting Latino leadership in entrepreneurship, corporate America, and public service. In addition, he serves on the Board of Directors of Sponsors for Educational Opportunity (SEO), which has made a lifetime of achievement possible for nearly 20,000 talented young people from underserved and underrepresented communities around the United States.

Claire Branch

Vice President

Warburg Pincus

Claire Branch is based in New York, joined Warburg Pincus in 2017 and focuses on Business Services investments. Prior to joining Warburg Pincus, she worked in the Corporate Finance & Strategy group at McKinsey & Company. Claire received an AB Magna Cum Laude in Philosophy from Princeton University and an MBA with High Distinction from Harvard Business School.

Margot Bradenburg

Senior Program Officer, Mission Investments

Ford Foundation

Margot Brandenburg is a senior program officer on the foundation's Mission Investments team, focused on building and strengthening the infrastructure of the impact investment market—with an eye to shaping the broader capital markets. She has spent two decades working at the intersection of philanthropy, capital markets, and social and environmental justice.

Prior to joining Ford, Margot served as founder and CEO of MyStrongHome, a benefit corporation delivering resilience finance services to homeowners across the Southeast and Gulf Coast of the US. Before that, she helped design and lead the impact investing initiative at the Rockefeller Foundation. She co-authored the book The Power of Impact Investing with former RF president Judith Rodin. While at Rockefeller, she also focused on job creation and issues of economic security for low-wage workers.

Margot began her career in international microfinance and has worked with several community development finance institutions in the US. She serves on the boards of the Workers Lab, Brooklyn Cooperative Credit Union, and the Woodcock Foundation, and as an adviser to the National Domestic Workers Alliance as well as the National Energy Improvement Fund.

She received a master's in public affairs from the Woodrow Wilson School at Princeton University and holds an undergraduate degree from Stanford University.

Elliott Campbell*

Principal

HarbourVest Partners

Elliott Campbell joined HarbourVest in 2013 as a member of the secondary investment team, where he focused on analyzing, structuring, and monitoring secondary private equity opportunities, including traditional and complex transactions. He left HarbourVest to attend business school and rejoined the Firm in 2019. Elliott is a member of the direct co-investment team and focuses on sourcing, reviewing, executing, and monitoring direct co-investments.

Elliott rejoined the Firm from Johnson & Johnson, where he was a general manager on the Listerine brand with full P&L ownership. His responsibilities also included executing retail activations and developing creative and digital marketing content. Prior to that, Elliott spent two years with Wells Fargo Securities, where he was as an investment banking analyst in the Leveraged Finance Group focused on originating, structuring, underwriting, and executing debt financing to support mergers and recapitalizations.

Elliott received a BA in Political Science from Davidson College in 2011 and an MBA from Harvard Business School in 2017.

Anise Charles

Senior Investment Analyst

Ford Foundation

Anise Charles is a Senior Investment Analyst at the Ford Foundation, covering Public Equities. Prior to joining the Ford Foundation, Anise spent two years as an Investment Banking Analyst at J.P. Morgan, with a focus on deal origination and leveraged credit lending within the technology, media, and telecommunications industry. Anise is a graduate of Swarthmore College, where she received a degree in Economics.

Clauter Johnson

Director

Bank of America

Clauter is a Director within the Alternative Investments Distribution team at Bank of America focusing on the Private Bank and ML Private Wealth channels. In his role as an Ultra High Net Worth specialist Clauter works closely with his advisors, helping to identify the right solutions for their clients.

In 2014 prior to becoming a specialist, Clauter worked as a business analyst covering the U.S. Trust alternative investments platform. Before joining Bank of America in 2010, Clauter was with UBS as a member of their Financial Advisor Associate program, there he gained a deeper interest in the wealth management industry specifically alternative investments. Clauter graduated from Rutgers University Business School with a B.S. in Finance and a minor in Economics. He currently holds the Chartered Alternative Investment Analyst (CAIA) designation.

Clauter resides in Springfield, NJ where he enjoys spending time with his family. In his down time he also enjoys sports and billiards. Clauter is fluent in French.

Kenneth Chenault Jr.

Co-Founder & Managing Partner

Benchstrength

Ken is Co-Founder and Managing Partner of Benchstrength. Benchstrength is an early-stage venture firm with a mission of supporting underrepresented founders. Prior to launching Benchstrength, Ken was a Principal at General Catalyst, where he was a multi-stage investor with a primary focus on Healthcare and Fintech. He was also the Co-Head of the firm's DE&I team. Prior to GC, Ken was an early employee at WayUp, an HRTech company that helps match college students and grads with job opportunities. Before WayUp, Ken was an Associate at Global Infrastructure Partners on the investment team. Ken began his career at Goldman Sachs on the sales desk for the Prime Brokerage group.

Ken received his Bachelor's degree and MBA from Harvard. He is also a co-founder of the Anti-Racism Fund (ARF). ARF is a non-profit fund of funds with a focus on raising money to support different initiatives that benefit the African American community.

Speaker Biographies
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Anar Chudgar

Co-President

Artemis Real Estate Partners

Anar Chudgar is the Co-President at Artemis Real Estate Partners, where she is responsible for developing, implementing, and overseeing both equity and credit investing platforms. Ms. Chudgar has more than 20 years of experience in real estate principal investing and investment banking. She sits on the Firm's Investment Committee and serves as Portfolio Manager for the Income and Growth Fund.

Prior to joining Artemis in 2019, Ms. Chudgar spent nine years as a Partner at GCM Grosvenor, where she co-led the creation and growth of the $5.0 billion real estate platform. She has closed on $1.7 billion in joint venture real estate transactions in North America and Europe spanning both equity and debt, leading all aspects of investment management, including transaction sourcing and execution, asset management, portfolio management, and capital raising. Prior to that, Ms. Chudgar was a Principal in Alternative Investments at Credit Suisse Group AG, held positions at Onex Real Estate Partners, iStar Financial, Inc., and began her career at JP Morgan Chase in real estate investment banking.

Ms. Chudgar graduated magna cum laude from the Wharton School at the University of Pennsylvania and continues to be involved with the school. She is on the Board of Advisors of the Annenberg Center, a resource for the performing arts at the university.

Ms. Chudgar currently serves as Vice Chair of the Board of the Pension Real Estate Association and as Committee Chair of the Nominating and Governance Committee at Spark Youth. Ms. Chudgar is an Executive Council member of the Real Estate Finance and Investment Center at the University of Texas at Austin, New York Women Executives in Real Estate (WX), and the Urban Land Institute's UDMUC Green Council.

Charlie Compton

Managing Director

AE Industrial Partners

Mr. Compton is a Managing Partner at AE Industrial and is primarily focused on originating, executing and monitoring AE Industrial's portfolio investments. Mr. Compton currently serves on the Board of Directors of AE Industrial portfolio companies: AIM MRO, Blue Raven Solutions, G.S. Precision, Kellstrom Aerospace and Moeller Aerospace, and is a member of the Firm's Investment Committee. He previously served on the Board of Directors of BHI Energy, prior to its sale to Westinghouse Electric Company in 2022, and Solairus Aviation which was sold in 2022. Prior to joining AE Industrial in 2014, Mr. Compton was an Associate with Vestar Capital Partners where he was responsible for executing new investments, as well as portfolio company M&A and financing activities. From 2009 to 2012, Mr. Compton was a member of Wells Fargo Securities' Financial Institutions Group, where he completed numerous advisory and capital markets transactions totaling over $25 billion.

Fred Cummings

President, Founder & Portfolio Manager

Elizabeth Park Capital Management

Fred Cummings is the President and Founder of Elizabeth Park Capital Management. He serves as Portfolio Manager for the privately-held, alternative asset management firm focused on long/short equity, event-driven, and customized investment opportunities in the banking sector. The firm supports community bank technology investment through a partnership with Strandview Capital and the Btech Consortium Fund. The firm is the investment manager for the Mission Driven Bank Fund that invests in CDFIs and MDIs throughout the country. Fred serves on the investment committee for the Btech Consortium Fund and the Mission Driven Bank Fund.

Mr. Cummings is an investment and banking portfolio manager with 30+ years' industry experience leading disciplined, client-focused investment practices. His esteemed performance establishes him as a principled bellwether across the investing and banking industry. His singular focus on banks paired with his curated approach to investing, M&A, and risk analysis transcends the Elizabeth Park mission to be the best bank investment firm in the country.

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

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

Fred was named 2017's Crain's Cleveland Business Who's Who and Cleveland.com's People to Watch in 2015. As an industry expert, he has been featured on various media outlets, including The Wall Street Journal, CNBC, INC Magazine, Crain's Cleveland Business, CNN Money, and was a cited expert in the recently published book by Wiley called "Bank Investing, a Practitioners Field Guide. Fred lives in the Cleveland area with his wife.

Michaela Edwards

Partner

Capricorn Investment Group

Michaela Edwards is a Partner and member of the Investment Team. She serves on the investment committee for all Capricorn strategies and has responsibility for co-leading the investment management of individual client portfolios as well as the Sustainable Investors Fund. She joined the firm in 2019.

Prior to Capricorn, Michaela spent nine years as a Senior Portfolio Manager with Norges Bank Investment Management, the sovereign wealth fund of Norway. Before joining Norges, Michaela worked as a research analyst for Russell Investments in London and New York. She started her career on the trading desk of DNB in Oslo.

Michaela is a graduate of Oslo University College and Cass Business School in London and a CFA charterholder.

Peter Epstein

Managing Director

Allocate

Peter is a Managing Director, Alternatives at Allocate, a leading digital investment platform for venture capital and boutique alternatives. Peter is responsible for partnering with RIAs, multi-family offices, and wealth management firms as they look to grow and expand their Alternatives allocations.

Prior to Allocate, Peter spent 11 years at J.P. Morgan Asset & Wealth Management. As an Executive Director, Alternatives Product Specialist, Peter led J.P. Morgan's efforts in designing, building, and managing multi-Alternatives solutions, as well as helping to launch J.P. Morgan's Alternatives distribution to RIAs and wealth management firms. This included leading J.P. Morgan's partnership with iCapital Network in 2018. Peter previously was a Management Associate, working directly for the Head of J.P. Morgan Global Alternatives. Peter started his career at J.P. Morgan's Private Bank in 2012, where he generated thematic investment ideas across public and private markets and worked with many of the largest families in Los Angeles.

Peter holds a B.A. in Business Economics from University of California, Santa Barbara, and an M.A. in International Finance and Economics from Johns Hopkins University. Peter has his series 3, 7, and 63 licenses

Heather Faust

Managing Partner & Co-Founder

Argand Partners

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), and Sigma Electric. She previously served as a Director of Tensar Corporation, Industrea Acquisition Corp. (NASDAQ: INDU), Baker & Taylor, IDQ Holdings, Inc. and Ames True Temper.

Kathlika Fontes

Director, Investor Relations

Grain Management

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

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

Nikhil Gadia

Director

BlackRock

Nikhil Gadia, Director, is a senior member of the Opportunistic Credit investment team responsible for sourcing and leading investments across sectors with a primary focus on the team's hedge fund strategy (BlackRock Credit Alpha).

Before joining BlackRock in 2016, Mr. Gadia was a Managing Director at Watershed Asset Management where he was responsible for leading investments in corporate credit, structured credit and equity securities across various sectors as well as participating in portfolio construction and risk management discussions. Prior to Watershed, Mr. Gadia was an Investment Banking Analyst in the Mergers & Acquisitions Group at UBS from 2005 – 2007 where he worked on several multi-billion dollar M&A transactions.

He earned a Bachelor's Degree in Electrical / Computer Engineering & Computational Finance from Carnegie Mellon University in 2005. He graduated from The Wharton School with an MBA in Finance and Accounting in 2011.

Justin Glover

Public Markets Investment Analyst

Robert Wood Johnson Foundation

Justin Glover joined RWJF as a Public Markets Investment Analyst in June 2023. Justin helps oversee RWJF's traditional and alternative investment portfolios. Prior to joining the Foundation, Justin worked at Morgan Stanley on the Strategic Partnership team within the Wealth Management Division. He graduated from The Wharton School, University of Pennsylvania, with concentrations in Finance and Entrepreneurship. Justin is from Haymarket, Virginia and has been involved in several initiatives related to investment education, small business entrepreneurship, and now serves on the Young Professional Committee at Princeton Blairstown Center

Antonio Guirola

Analyst

Penn Office of Investments

Antonio Guirola joined the Penn Office of Investments in 2022 and is an Analyst focusing on the biotechnology, venture capital, and private equity program for the University's endowment and pension plan.

Antonio graduated cum laude from Trinity College, where he received a B.A. with honors in Political Science and a minor in Middle East Studies. While at Trinity, he was a Posse Foundation Scholar and member of the Men's rowing team. Antonio is a native of Queens and currently resides in Philadelphia.

Joseph Haslip

Managing Director

Valor Equity Partners

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.

Omar Jabri

Managing Director

Lexington Partners

Omar Jabri is a Managing Director of Lexington Partners primarily engaged in the evaluation of equity co-investments.

Prior to joining Lexington in 2011, Mr. Jabri was an analyst in investment banking at Evercore Partners.

Mr. Jabri graduated from Western University, Ivey School of Business with a BA in business administration.

Priya Kaftan

Head of Investor Relations & Product Strategy

Heard Capital

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. Her responsibilities included managing relationships with Silver Point Capital's existing and prospective investors, product strategy, reporting, credit market research and communications.

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

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 and on the Sponsorship Committee of Women Investment Professionals, a professional community that enhances women's opportunities and growth in the investment industry.

John Kim

Managing Director, Investor Relations & Chief Development Officer

General Catalyst

My first job after college as an IBM marketing rep taught me two important things about myself. Through that initial work, I first discovered and explored my love for sales and marketing. The Art of Persuasion became a passion I would cultivate over the arc of my career. Second, I learned that success is achieved only when the customer believes that their needs are understood and met with care. As my mentor used to say, "Take good care of your relationships or someone else will."

After getting my MBA at Harvard, I went into private equity where I could integrate these capabilities into the core mission of the investment firms that I worked for. At the time, the investor relations role was still quite new and no one had written the playbook on how it should be done. For me, it meant dissolving the isolation that had long existed between investment professionals and their investors.

Bridging those two worlds became a calling for me. Over the course of my career, that calling helped me to create authentic and meaningful connections with a broad range of investors while working for world-class investment firms such as JP Morgan, Court Square Capital, and most recently at Kelso & Co.

What I love about General Catalyst is our focus on seeing how big a difference the firm can make for others whether they are limited partners, portfolio companies, or individuals in the firm's amazing network of entrepreneurs.

Outside of the office, I support organizations devoted to education for underprivileged kids in Brooklyn (my home) and internationally. I also like to get out on the water with boats or a paddle board, and I hold a purple belt in Jiu Jitsu. If you catch me at a party, be prepared to sing: my guitar knows the chords for hundreds of songs.

Daniella Kranjac

Founding GP

Avant Bio

Daniella Kranjac has spent her career focused on therapeutic-enabling technologies. As an entrepreneur, corporate executive, advisor, and investor, Daniella has continuously been a driving force and plays a critical role in this ecosystem reflected by numerous recognitions and awards, including Fierce Pharma's Fiercest Women in Life Sciences 2022 and a Lifetime Luminary nomination at Biotech Week Boston, 2022.

She began her career as a Co-Founder of Wave Biotech where she drove the growth of a disruptive bioprocessing technology, later exiting to GE Healthcare in 2007 (now Danaher/Cytiva). Later in 2012, Wave Biotech was recognized as BioProcess International's "Technology of the Decade." At GE, Daniella held several strategic, business development, M&A, integration, and commercial leadership roles, building the several hundred-million-dollar Enterprise Solutions.

True to her entrepreneurial spirit, she founded Dynamk Consulting in 2015 to support technical founders and strategics in Life Science Industrials with capital, business development and strategic guidance. Seeing the potential of life science industrials and their need for capital, Daniella successfully launched the first venture fund focused on Life Science Industrials, and now serves on the boards of Alpenglow Biosciences, CellFE, Curi Bio, RoosterBio, Vernal Biosciences and Virica Biotech.

Daniella is an active member of NAIC (National Association of Investment Companies), PEWIN (Private Equity Women Investor Network), WAVE (Women in Venture and Equity), and is a frequent invited speaker at life science symposia.

Aisha P. Lavinier

Partner

Kirkland & Ellis

Aisha Lavinier is a corporate partner in the Chicago office of Kirkland & Ellis LLP. Aisha advises private equity sponsors and public and private companies on complex business transactions, including structuring and negotiating strategic mergers, acquisitions and divestitures, leveraged buyouts, equity and debt financings, recapitalizations and restructurings, executive compensation and incentive equity arrangements, as well as other general corporate matters.

Aisha has represented public companies, private companies and private equity firms on transactions, in various industries, including, specialty chemicals, healthcare, pharmaceutical, retail, software and service providers, transportation and logistics. Representative matters have ranged in size from several million dollars to more than $6 billion.

Marcus Lawrence

Principal

TPG, Next

Marcus Lawrence joined TPG in September 2023 as Principal at TPG NEXT, a seed and GP stakes platform for investment management firms.

Prior to joining TPG, Mr. Lawrence was a Vice President at Wafra and was responsible for executing seed and mature strategic partnerships, structured GP financings, and secondaries with alternative sponsors. Previously, Mr. Lawrence was a Vice President at PineBridge Investments where he executed private equity secondaries and co-investments. He began his career at Citigroup Alternative Investments and Auldbrass Partners, a private equity secondaries firm.

Mr. Lawrence earned a BS from the Wharton School at the University of Pennsylvania.

Stacy Levine

Partner

Amity Search Partners

Stacy joined Amity Search Partners at its inception and is a Partner in our New York office. Stacy has over 15 years of private equity and hedge fund recruiting experience placing candidates at all levels in North America and key international markets. 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.

Carlton Lew

Investment Associate

The James Irvine Foundation

Carlton Lew joined the Foundation as an Investment Associate in 2022. Prior to joining the Foundation, Carlton was an Investment Associate at Pantheon Ventures where he focused on the analysis, evaluation and completion of North American private equity investment opportunities. He began his career at Evercore as an Investment Banking Analyst where he focused on mergers and acquisitions in the technology sector.

Carlton earned a bachelor's degree in business administration from the University of Southern California.

Jessica Marlin

Partner

Ropes & Gray

Jessica Marlin advises private fund sponsors on all aspects of their businesses, including fund formation, management company matters, and regulatory and compliance issues, focusing on bespoke products and diverse business lines. Jessica has a particular focus on representing sponsors of credit funds and hedge funds.

Jessica also represents large institutional investors and secondaries buyers with capital deployment in alternatives, negotiating anchor investments in primary private fund investments, secondary transactions and GP-led continuation vehicles. Jessica's regulatory practice focuses on advising private fund sponsors on complex conflicts and regulatory issues, especially involving multiple business lines.

With a background that includes in-house hedge fund experience, she brings a practical understanding of client issues and in-depth knowledge of complex fund structures and the overall regulatory landscape to her legal work for asset management clients.

Sofia Martos

Partner, ESG & Impact

Kirkland & Ellis

Sofia is a partner in the Los Angeles office of Kirkland & Ellis LLP and member of the Firm's ESG & Impact Practice Group, which advises some of the world's most sophisticated and dynamic private equity firms, corporations, and project sponsors and lenders on complex and evolving legal issues relating to ESG and climate-related regulatory requirements, investor demands, strategic opportunities, and voluntary reporting frameworks and coalitions.

Sofia's practice focuses largely on social and governance issues. She leads Kirkland's DEI strategic services, advising clients on emerging legal developments, risk assessments, and risk mitigation strategies related to DEI. She also counsels clients on ESG and DEI disclosures in sustainability reports, proxy statements and annual reports, which includes advising on regulatory requirements, international disclosure trends, and industry best practices. Her experience advising on governance matters includes assessments of ESG programs and disclosures, board and management governance counseling through presentations and trainings, and shareholder activism defense. She helps clients to identify opportunities to tailor their ESG programs to their particular goals while mitigating legal and reputational risks, including developing strategies for integrating ESG into larger business and governance practices.

Sofia builds upon her experience in U.S. securities law to advise public and private companies on recent and emerging ESG regulatory developments, such as proposed and anticipated U.S. Securities and Exchange Commission rules related to climate risk and human capital, including workforce diversity and corporate board diversity.

Prior to focusing on ESG full time, Sofia spent over a decade working on cross-border capital markets matters across Latin America, the United Kingdom, Europe, and Japan while based in New York, London, and Tokyo. She uses this international lens to stay abreast of global regulatory developments and trends related to ESG. Sofia has represented companies across a range of industries, including technology and energy companies, as well as financial institutions.

Speaker Biographies

SEO AICON

Martha Masiarz

Director

Odyssey Search Partners

Martha Masiarz is a Vice President at Odyssey Search Partners, where she has been helping buyside firms find talent for over 5 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 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.

Sayiddah McCree

Senior Impact Investments Officer

MacArthur Foundation

Before MacArthur, Sayiddah worked at J.P. Morgan and the Ford Foundation advancing impact and financial returns through investments in private equity funds. Sayiddah has worked at Harvard Business School as a Senior Researcher and at Related Companies as a real estate investor. She started her career as a building façade consultant, advising real asset owners, and managing construction projects in New York City and Chicago. She holds an MBA from Harvard Business School and a Bachelor of Architecture from the Illinois Institute of Technology. She is a board member of the International Contemporary Ensemble.

Nellie McCullough

Principal

Henkel Search Partners

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.

Megan Messina

Managing Director & Head of CLO Capital Markets

Oaktree Capital Management

Ms. Messina leads Oaktree's CLO capital markets efforts and is a managing director for the U.S. Senior Loans strategy. Prior to joining the firm in 2022, Ms. Messina was a director and senior portfolio strategist at Symphony Asset Management where she led the development and distribution of the structured credit platform both internally and externally. Prior thereto, Ms. Messina was a managing director and the Co-Head of Global Structured Credit Products at Bank of America Merrill Lynch and before that was a director at Citi for their global CLO business. In these roles, Ms. Messina oversaw primary issuance, secondary trading, and credit financing businesses in New York and London and was responsible for pitching, pricing and managing client relationships. Additional investment experience includes roles at Citi as a director in Credit Derivatives trading, Salomon Smith Barney in their Retail Credit Markets group and in retail sales within the Taxable Fixed Income department at PaineWebber, Inc. Ms. Messina received a B.A. degree from Fordham University.

Neil Messing

Head of Hedge Funds

Office of the New York City Comptroller

Neil Messing joined the Office of the New York City Comptroller's Bureau of Asset Management as a Senior Investment Officer in the Hedge Fund Group in January 2011. In this role, he was responsible for building, managing and monitoring more than $3 billion in hedge fund investments. In 2014, he was promoted to Head of Hedge Funds to oversee the hedge fund portfolio for the New York City retirement systems.

Prior to BAM, Mr. Messing was a part of the hedge fund manager due diligence team for the US investment arm of Unigestion, a global alternatives investment firm.

Prior to joining Unigestion, he served as a Hedge Fund Analyst for Glenwood Capital Investments, a pioneer in the hedge fund of funds industry.

Mr. Messing received a B.S. in Finance from the University of Arizona.

Patricia Miller Zollar

Managing Director

Neuberger Berman

Patricia Miller Zollar is a Managing Director of Neuberger Berman and a leader of the Firm's Private Investment Portfolios practice. She is a member of the Co-Investment and Private Investment Portfolios Investment Committees. Additionally, Ms. Zollar sits on the Limited Partner Advisory Boards of a number of funds. 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.

Chris Moon

Managing Director & Partner

DigitalBridge

Chris Moon is a Managing Director, Credit at DigitalBridge Investment Management. Mr. Moon is responsible for origination in the Americas and European regions and has over 20 years of experience in the Communications and Technology sectors including over 15 years of direct experience in sourcing transactions in digital infrastructure.

Prior to joining DigitalBridge, Mr. Moon was a Managing Director and founding member of the TMT Sector Lending Group at ING Bank and had responsibility for origination, structuring and underwriting leveraged transactions in North America and LatAm. Prior to ING, Chris was an Analyst at Goldman Sachs in the Investment Management Division and a CPA at PriceWaterhouseCoopers in the Communications and Technology practice.

Mr. Moon received an MBA and MS in Tax and a dual Bachelor of Science in Finance and Computer Information Systems from Northeastern University. He is a CFA Charterholder and a Certified Public Accountant (inactive).

Katie Moore

Managing Director

Hamilton Lane

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

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

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

Trey Muldrow

Partner

Weil, Gotshal & Manges

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.

Ermias Nessibu

Principal

GCM Grosvenor

Mr. Nessibu is involved in all aspects of the firm's real estate practice, including deal sourcing, structuring, due diligence, asset management, and managing client relationships. He has previously worked with owner-operators where he was responsible for executing real estate debt and equity investments in the residential, office, retail, and hospitality sectors across North America. Prior to joining GCM Grosvenor, Mr. Nessibu worked as an Associate for Pathway Capital Management where he led new deal execution, conducting due diligence on and recommending private equity investment opportunities across various strategies. Prior to that, he was an investment banker with KPMG Corporate Finance where he advised middle-market clients on mergers and acquisitions within the business services group. Mr. Nessibu received his Bachelor of Science in Accounting magna cum laude from Old Dominion University and his Master of Business Administration in Real Estate from the UCLA Anderson School of Management.

David Perez

Co-Founder & Managing Partner

Avance Investment Management

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, President of the Board of Trustees of the 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.

Allison Pistone

Managing Director

Cerberus Capital Management

Ms. Pistone is a Managing Director on the Real Estate Private Credit team.

Prior to joining Cerberus in 2020, Ms. Pistone spent six years at AllianceBernstein, where she was responsible for loan origination for the Commercial Real Estate Debt Fund. Ms. Pistone began her real estate investing career as an associate in the Real Estate Capital Markets Group at Barclays Capital.

Ms. Pistone graduated from Boston College and received an M.B.A. from the Wharton School of the University of Pennsylvania.

Kwesi Quaye

Partner

Fairview Capital Partners

Mr. Quaye, who joined Fairview in 2017, is a Partner and a member of Fairview's Investment Committee. He focuses on research, due diligence, deal sourcing, investment monitoring, and business development for Fairview's venture capital and private equity partnership and direct co-investment portfolios. Prior to joining Fairview, Mr. Quaye was an Investment Officer at the Cook County Pension Fund, where he supported portfolio strategy across all asset classes. Additionally, in that role, Mr. Quaye led investment manager due diligence and performed various portfolio optimization analyses to maximize risk-adjusted returns. Mr. Quaye also spent time with PricewaterhouseCoopers LLP where he served as a Senior Transaction Advisory Associate performing buy-side mergers and acquisitions due diligence on companies in the healthcare, education, and consumer products spaces. Moreover, Mr. Quaye also spent time with Ernst & Young LLP as a Senior Associate in the Assurance practice where he led day to day audit engagements for diversified services clients.

Mr. Quaye holds a B.S. with concentrations in Accounting and Finance from DePaul University and an MBA in Finance and Management & Strategy from the Kellogg School of Management at Northwestern University. He serves on the Connecticut Science Center Board of Trustees and is the former Chairman of the West Hartford YMCA Board of Advisors.

Eric Requenez

Partner

Ropes & Gray

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.

André Rice

President

Muller & Monroe Asset Management

André Rice is the President of Muller & Monroe Asset Management (M²), which he founded in 1999. André is responsible for general management of the firm, client service, business development, and serves as chairman of the investment committee.

Prior to founding M², André was a serial deal investor. Earlier in his career, he worked in the Mergers and Acquisitions Department at Kraft Foods and worked in securities sales at Goldman Sachs after beginning his career as an auditor at Peat, Marwick, Mitchell & Co.

André is a member of the Board of Directors of CNA Financial Corporation and the Board of Directors of New America Alliance (NAA). He is also a member of the National Association of Investment Companies (NAIC), National Association of Securities Professionals (NASP), Leadership Council of Prevent Child Abuse America (PCAA), and is a life member of Kappa Alpha Psi Fraternity, Inc. André has a history of philanthropy, mentorship, and civic engagements.

André received a B.S. in accounting, with honors, from South Carolina State University and an MBA from the University of Chicago. He is a Certified Public Accountant.

Dakotah Rice*

Founder & Chief Executive Officer

Caliber X

Dakotah Rice is the Founder and CEO of Caliber X. 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.

Speaker Biographies

SEO AICON

Craig Sabal

Deputy Chief Investment Officer

New York Life Insurance Company

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 insuranc e 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.

Omar Shalaby

Director

CVC Capital Partners

Director, joined CVC in 2016. Omar is a member of the CVC Technology team and is based in New York.

Prior to joining CVC, he worked at Folger Hill Asset Management; Welsh, Carson, Anderson & Stowe; and Barclays in New York.

Omar received a BS summa cum laude in International Economics from Georgetown University.

Mike Siegel

Global Head of Insurance & Liquidity Solutions

Goldman Sachs

Mike is global head of the Insurance Asset Management and the Liquidity Solutions businesses within Goldman Sachs Asset Management (GSAM).The Insurance Asset Management business is responsible for providing solutions to insurance companies seeking to outsource the management of their balance sheet assets, including traditional and alternative asset classes. The Liquidity Solutions business is responsible for the management of GSAM money market funds and short duration fixed income products. He also serves as a senior managing director champion for the Disability Interest Forum. Mike has extensive insurance and investment experience in structuring and managing portfolios across a broad range of fixed income and equity asset classes and has been responsible for businesses within Consumer and Investment Management (CIMD) and the Securities Division. Previously, he was responsible for the Americas Markets Solutions Group within CIMD and also led the Insurance Industry Resource Group, which works closely with insurers on asset-liability management, asset allocation, capital allocation and risk management issues. During his time in the Securities Division, Mike oversaw the development of new products and the coordination of structuring efforts across product areas, including Equities, Interest Rates, Credit Products, Currencies, Commodities, and Municipals. He was co-head of the Municipal Structured Products business and responsible for derivative marketing to North American insurance companies, banks, agencies, pension funds, hedge funds and mutual funds. Mike first joined Goldman Sachs in 1986, rejoined the firm as a managing director in 2000 and was named partner in 2012. Prior to rejoining the firm, Mike spent four years at General Reinsurance, where he was responsible for North American marketing for the General Re Financial Products subsidiary, working closely with General Re's insurance clients.

Speaker Biographies

SEO AICON

Michael Silva

Investment Officer

CalPERS

Michael 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, Michael 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.

Michael 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, Michael began a career in public affairs, working on several statewide campaigns and serving as a Deputy Press Secretary prior to his investment career.

* indicates SEO Alumnus ** indicates SEO Board Member

Andrew Siwo

Director of Sustainable Investments and Climate Solutions

New York State Common Retirement Fund

Andrew Siwo is the Director of Sustainable Investments and Climate Solutions at the New York State Common Retirement Fund. He is charged with providing leadership and oversight of sustainable investment efforts across the Fund's $272 billion portfolio. Previously, Siwo was an Investment Director and Head of Mission-Related Investments at Crewcial Partners, an investment consultancy to over 150 leading foundations and endowments.

Prior to joining Crewcial Partners, Siwo was a manager at the Global Impact Investing Networking (GIIN). Prior to joining the GIIN, Siwo spent five years in the investment banking division at JP Morgan—most recently in the Global Special Opportunities Group, a $3 billion proprietary portfolio of principal investments in private equity, debt, mezzanine, infrastructure, and real estate. He also held roles on the Rates Desk and executed fixed income financing transactions as well as the Securitized Products Group where he valued collateralized mortgage obligations.

Before JP Morgan, Siwo was a member of the Corporate Finance and Real Estate Strategy Group at Victoria's Secret.. He began his career at E*Trade Financial where he managed a team of investment representatives serving active traders and high net-worth investors.

Siwo completed an MPA in Finance and Fiscal Policy at Cornell University and holds a BA in Accounting from Morehouse College. He has held FINRA Series 7, 63, and 24 licenses. He teaches an ESG course at The Wagner Graduate of Public Service at NYU where he is an Adjunct Assistant Professor of Public Service. Siwo also serves on the Board of New York Professional Advisors to Community Entrepreneurs (NYPACE).

Speaker Biographies

SEO AICON

Merle Smith

Director

Brightwood Capital

Merle Smith is a Director on the Investment Team. Prior to joining Brightwood, he was a Vice President and founding member of BNP's Distressed Credit Trading Group, focusing on creating and sourcing investments in distressed debt both on the secondary and primary markets. Prior to this role Merle was a member of BNP's Leveraged Finance Group where he focused on the execution of debt transactions for sponsor-backed private companies and large publicly held corporations. Merle began his career in middle market commercial banking working as an underwriter for several regional banks around New England. He graduated from Amherst College with a bachelor's degree majoring in Political Science.

Ramsey Smith * ***

Founder

ALEX.fyi

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

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

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

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

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

Charlie Tafoya*

Co-Founder & Chief Executive Officer

Chronograph

Charlie is the Co-Founder and CEO of Chronograph, provider of next-generation portfolio monitoring and reporting solutions to private capital LPs and GPs. He previously was a private equity secondaries investor with Pantheon Ventures and investment banker with Bank of America Merrill Lynch.

Charlie is an SEO alum and current mentor of both the Investment Banking Career program and Alternative Investment Fellowship and joined the SEO Junior Leadership Board in 2018. 125%

Michael Taylor

Partner, Co-Investments

Adams Street Partners

Mike is a member of the Co-Investment Team. In this role he sources, screens, executes, monitors, and coordinates the exit of co-investments.

He joined the Adams Street Co-Investment Team in 2020 after spending eight years as a member of the Adams Street Primary Investment Team.

Prior to joining the firm, he worked at Bank of America Merrill Lynch as an Investment Banking Analyst within their Global Industrials Group. His work focused on the automotive sector.

Mike is a member of Adams Street's Co-Investment Committee.

Speaker Biographies SEO AICON

Fernando Vigil*

Chief Investment Officer & Founder

Teca Partners

Fernando has over 20 years of experience across both public and private equity investing. Most recently, he was a Managing Director with Brookside Capital (a.k.a. Bain Capital Public Equity), which he joined in 2008. 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. 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. Prior to joining Bain Capital, Fernando spent two years at Trilogy Software.

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.

Outside of work, Fernando enjoys spending time with his wife Kim, cycling, playing backgammon, and listening to history podcasts.

Adam Winn

Executive Managing Director, Co-Head of Global Private Investments

Liberty Mutual Investments

Adam Winn is co-head of Global Private Investments (GPI) and a member of Liberty Mutual Investments (LMI) Executive Team. Adam oversees the strategy and day-to-day business of LMI's private investment platforms which span private equity, venture capital, private credit, real estate, distressed and energy transition. He serves as a member of multiple firmwide investment committees. He is also charged with driving innovation and partnerships efforts for LMI more broadly.

Prior to joining LMI, Adam spent over a decade at Goldman Sachs where he led the Cross Asset Solutions Group in the Securities Division. Adam and his team were responsible for structuring investment and financing solutions for institutions.

Adam lives with his wife, three children and dog outside of Boston. He is an active member of the community including as a board member of the YMCA of Greater Boston.

Caixia Ziegler

**Managing Director,
Real Assets and
Sustainable Investments**

MacArthur Foundation

Caixia is responsible for all aspects of MacArthur's real asset and sustainable investment portfolios, including strategy development and implementation, manager due diligence, selection and monitoring, performance reporting, and so on. The real asset portfolio includes real estate, energy and timber investments. Before joining MacArthur, Caixia was the Associate Director/Head of Real Estate at the Ford Foundation. Prior to that, she was the Director of Global Real Assets at the National Railroad Retirement Investment Trust, where she was responsible for its approximately $2.5 billion allocation to real estate, upstream energy, timberland and infrastructure investments.

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

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

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

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Chief Executive Officer
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Executive Vice President, Director, Strategic Investment Research Group
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Co-Founder & Chief Executive Officer
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Anita Sonawane
Real Assets Analyst
Bessemer Trust

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

Joshua Stern
Director, Private Investments
Robert Wood Johnson Foundation

Stefan Strein
Chief Investment Officer
Cleveland Clinic

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Investment Director
Capricorn Investment Group

Kara Zanger
Global Head of Legal
Pantheon

Caixia Ziegler
Managing Director of Real Assets
MacArthur Foundation

Patricia Miller Zollar
Managing Director
Neuberger Berman

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

2,500+
high school and college students served annually

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

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

SEO Scholars

For more than 40 years, SEO Career has recruited and prepared high achieving Black, Latinx, and Native American undergraduates for summer internships across Wall Street, commercial real estate, technology, and corporate America, usually leading to coveted, full-time jobs. SEO Career creates a more equitable society by closing the career opportunity gap for motivated young people.

Internship Areas:

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

~80%+
of SEO Career Interns in the past 10 years have recieved full-time offers from SEO partner companies

940+
college students in the SEO Career Summer Intern Class of 2023

200+
partners in 55+ cities

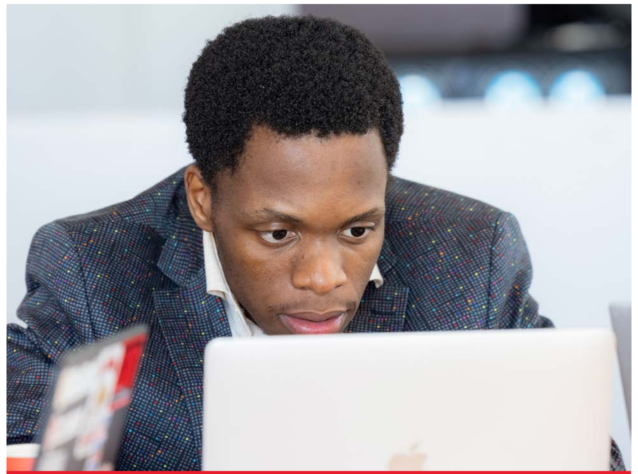
9,300+
alumni

SEO Career

SEO Tech Developer was founded as a virtual intensive, free immersion program to propel first-year and sophomore Black, Latinx, and Native American computer science and software engineering college students to the next level — including a PAID six-week summer residency.

Within SEO Tech Developer, we have three main initiatives:

- **First Year Academy:** semester-long technical training to introduce fundamental Python-programming skills to participants and serves a talent pipeline into Tech Developer
- **Tech Developer Program:** our flagship Tech Developer program, for first-year college students and sophomore computer science and software engineers
- **Tech Developer LITE:** part-time and asynchronous learning during the summer



90+
participants in the 2023 cohort

75%
of participants to date have completed summer tech internships

85%
of eligible Tech Developer participants have received full-time job offers in the tech sector

200+
alumni

SEO Tech Developer

SEO Alternative Investments is an industry-wide program that provides education, exposure, training, and mentorship opportunities to high-achieving professionals 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 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 Alternative Investments

SEO Law helps future lawyers thrive in law school and excel in their careers. Through our two program initiatives, the SEO Law Fellowship and SEO Law Catalyst, aspiring, pre-law students receive access to critical educational, career development, and internship opportunities that propel them to succeed in the legal profession. SEO Law has produced more than 40 partners at top law firms.

SEO Law Fellowship: helps law students thrive in law school and in corporate law firms. The year-long Fellowship provides incoming law students with:

- Academic and professional development
- Summer associate experience
- 1L academic support

SEO Law Catalyst: our free, virtual pre-law pipeline program that provides individuals resources and structured guidance throughout the law school application process. Components of the Catalyst include:

- A customized LSAT preparation course
- Workshops and individualized feedback to strengthen law school application material
- Access to admissions officers at law schools nationwide and mentoring from practicing attorneys

Fellows have become:

- Lawyers
- Advocates
- Business leaders
- Politicians

195
Fellows in the Class of 2023

47
partners in 17 cities around the nation

1,900+
alumni

61
Catalyst participants in the Class of 2023

SEO Law

@seolawprogram

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 strategies for managers, allies, and senior leaders at SEO partner companies to help attorneys from 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.

14,000+
Alumni of SEO USA programs

25,000+
Alumni of SEO programs around the globe

14
partners

SEO Leadership Institute

@seoleadershipinstitute


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.

SEO AICON


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 2024 Sponsors for Educational Opportunity Alternative Investments Conference.
For more information visit ml.com/solutions/alternative-investments.html
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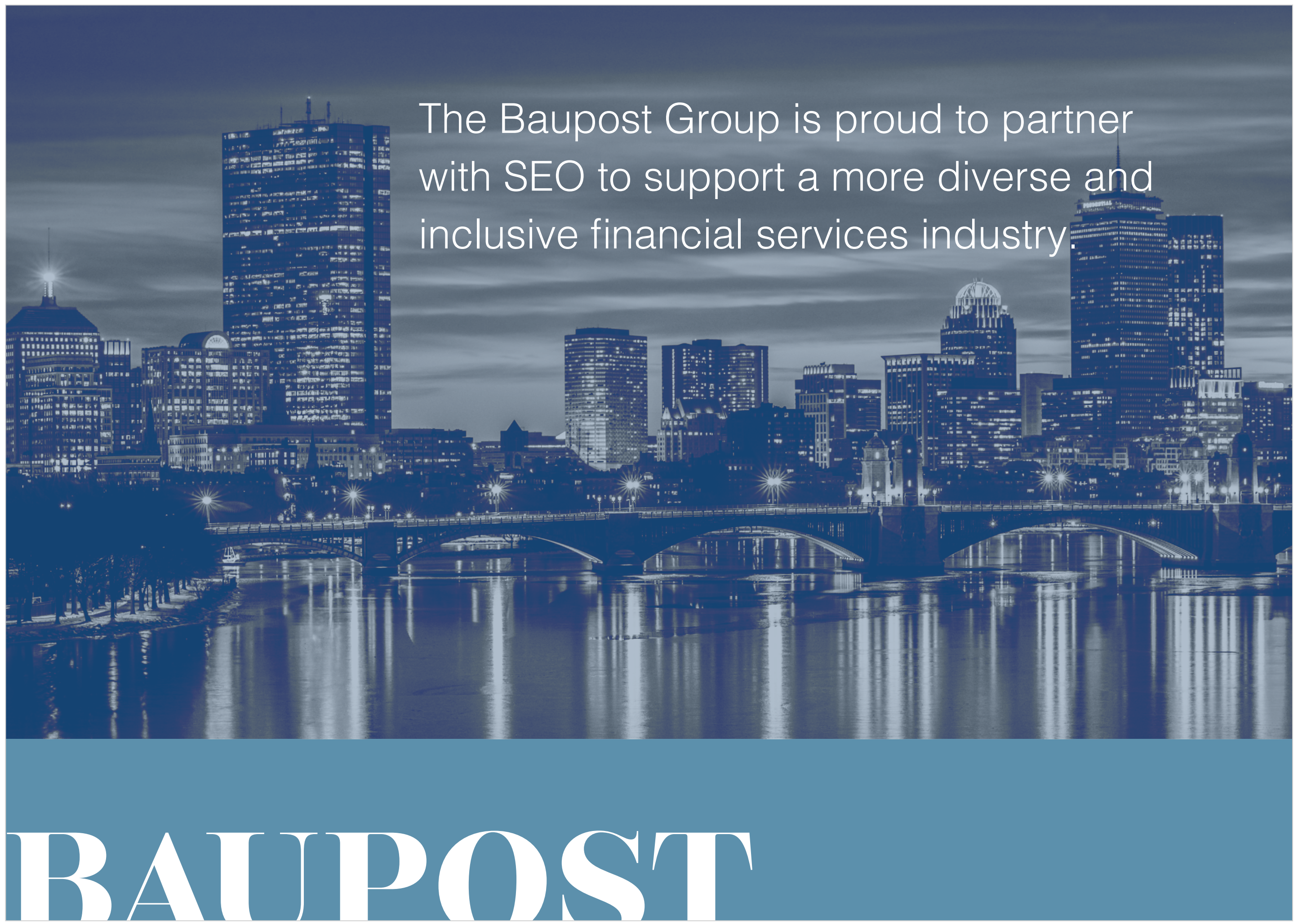

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IN FIXED INCOME ASSETS UNDER MANAGEMENT*
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40 FULL-TIME EMPLOYEES
88% MINORITY/WOMEN EMPLOYEES
88% OWNED BY MINORITY/WOMEN PARTNERS
18 PARTNERS
*DATA AS OF 1/31/2024
For more information, please contact:
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DigitalBridge is honored to continue supporting SEO's mission and proud to sponsor the
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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 alternative asset manager dedicated to investing in digital infrastructure. 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 $80 billion of digital infrastructure assets on behalf of its limited partners and shareholders.
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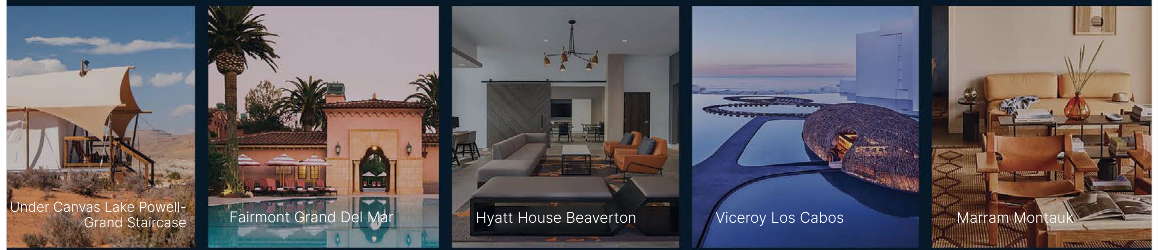

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KSL is a leading private equity firm with a 30-year track record investing exclusively in Travel & Leisure. Focused primarily on the hospitality, recreation, clubs, real estate and travel services sectors, KSL's current portfolio includes some of the premier properties in Travel & Leisure across the globe.

With offices spanning North America and Europe, KSL seeks to utilize its global expertise and local presence to invest in high-quality assets through its dedicated equity, credit and tactical opportunities funds and partner with remarkable businesses and management teams around the world.

For more information, please visit www.kslcapital.com.

FIRM

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

NEUBERGER BERMAN PRIVATE EQUITY

A leading global private equity investor with over 35 years of experience that has managed over $120 billion of commitments since inception through September 2023 across private equity fund investments in the primary and secondary markets, direct equity co-investments and debt investments in private equity-owned companies and a number of specialty strategies. Its dedicated team of over 280 professionals has a global presence with offices in the U.S., Europe and Asia. Over the last three years, Neuberger Berman Private Equity committed over $28 billion to private equity investments across primaries, secondaries and co-investments.

Visit us at www.nb.com

We are proud to sponsor the SEO Alternative Investments Conference

SEO

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ADAMS STREET INVESTS IN PEOPLE

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 15th Annual Alternative Investments Conference and share SEO's commitment to increasing access and career development in the alternative investments sector.

To learn more about us visit **adamsstreetpartners.com**

Adams Street

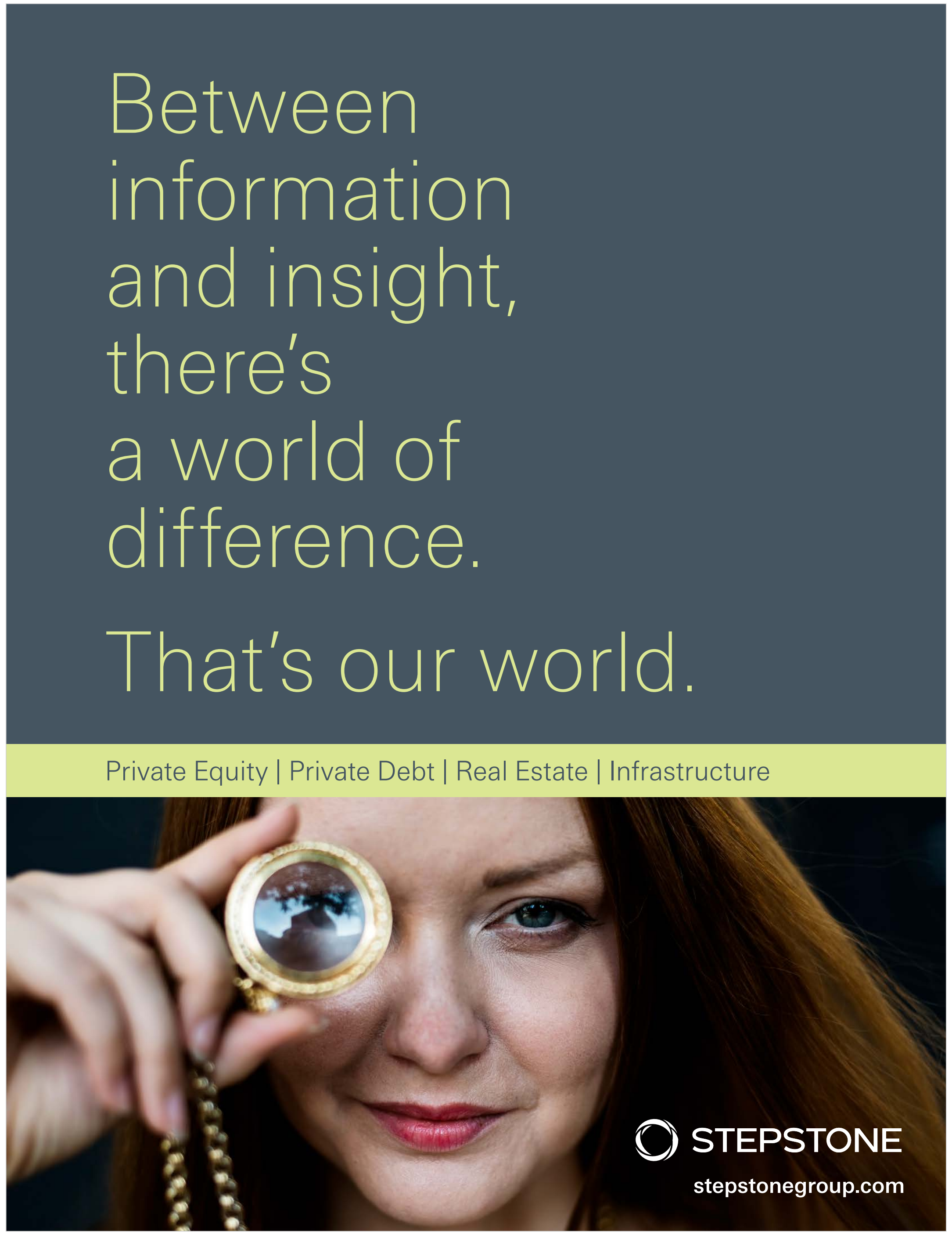
Ariel Alternatives

Good outcomes take time. Our enterprise is conceived for the times and built on a four-decade-old foundation.

SLOW AND STEADY WINS THE RACE

IN PROUD SUPPORT OF

SEO's 15th Annual Alternative Investments Conference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To learn more, visit:
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AIFP Partners
SEO AICON

GLOBAL INFRASTRUCTURE PARTNERS

Global Infrastructure Partners (GIP) is proud to be a longtime supporter of SEO

GIP is a leading infrastructure investor that specializes in investing, owning and operating some of the largest and most complex assets across the energy, transport, digital infrastructure and water and waste management sectors.

GIP has approximately $106 billion in assets under management. We believe that our focus on real infrastructure assets, combined with our deep proprietary origination network and comprehensive operational expertise, enables us to be responsible stewards of our investors' capital and to create positive economic impact for communities.

For more information, visit www.global-infra.com


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


Odyssey is a proud sponsor of
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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 Investment Partners is a leading private equity investment firm with more than a 25-year history of partnering with skilled managers and using its buy, build and integrate approach to transform middle-market companies into more efficient and diversified businesses with strong growth profiles. Odyssey makes majority-controlled investments in industrial and business services sectors with a long-term positive outlook and favorable secular trends. For further information about Odyssey, please visit www.odysseyinvestment.com.
Odyssey

AIFP Partners

SEO AICON


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Alternative Investments Conference
(AICON)
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of private equity investing
THL Partners invests in middle market growth companies exclusively within selected Identified Sector Opportunities (ISOs) in three industry groups: Financial Technology & Services, Healthcare, and Technology & Business Solutions.
Deep sector expertise
Integrated private equity model
Partnership approach
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SEO
TPG is a leading global alternative asset management firm, founded in San Francisco in 1992, with $222 billion of assets under management and investment and operational teams around the world. TPG invests across a broadly diversified set of strategies, including private equity, impact, credit, real estate, and market solutions, and our unique strategy is driven by collaboration, innovation, and inclusion. Our teams combine deep product and sector experience with broad capabilities and expertise to develop differentiated insights and add value for our fund investors, portfolio companies, management teams, and communities.
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SEO AICON

SEO

Access the talent you need with the **SEO Talent Opportunity Center**

The SEO Talent Opportunity Center (TOC) assists Middle-Market alternative investments fund managers in identifying and recruiting investment professionals. The TOC talent pool includes more than 3,800 SEO alumni presently working at Wall Street's leading investment banks, asset managers, and buyside firms, including 2,100 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 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 talent at the analyst level for Wall Street firms, including Goldman Sachs, Morgan Stanley, JPMorgan, Bank of America, Citi, Lazard, and Evercore. In Summer 2023, SEO placed nearly 400 investment banking and alternative investments summer interns at partner firms, with more than 70% of rising seniors receiving full-time job offers.

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

2024 SEO Talent Partner

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 Talent 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

www.seoleadershipinstitute.org SEOUSA1963 SEO (Sponsors for Educational Opportunity)

The SEO Talent Opportunity Center would like to say thank you to its valued Talent Partners for their support in SEO's work to expand professional development opportunities within alternative investments.

Hunter Point Capital

AllianceBernstein

Andalusian Credit Partners

Backcast Partners

BayPine

generation

RoundTable Healthcare Partners

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.

SEO
ANNUAL AWARDS DINNER
2024

SAVE THE DATE

Monday, April 15, 2024 at 6:00 pm

New York Hilton Midtown, New York City

HONOREES:

Adebayo Ogunlesi
Chairman and Chief Executive Officer
Global Infrastructure Partners

Chris Lee
Partner, Co-President of KKR Real Estate
KKR
SEO '98 Alumnus

DINNER CHAIR:

Naureen Hassan
President
UBS Americas
SEO '92 Alumna

For more information and to register visit:
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15TH Annual

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