

16TH Annual

SEO AICON

Alternative
Investments
Conference



*Left: Deborah L. Harmon, Co-Founder & Co-Chief Executive Officer, Artemis Real Estate Partners, SEO Board Member, and 2024 SEO RFL Award Recipient.
Right: Cheryl Mills, Founder & Chief Executive Officer, Blacklvy Group*

Conference Programming

SEO Alternative
Investments

Thursday, March 13, 2025

The Glasshouse
660 12th Ave, New York City

The SEO Alternative Investments Conference provides 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 seeking to gain access to educational and career opportunities.



Limited Partner Leadership Breakfast



Welcome
William Goodloe**
President & CEO
SEO



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



Fireside Chat
Marcelia Freeman
Investor Relations &
Product Management
Clearlake Capital Group



Fireside Chat
Ksenija Jovanovic
Managing Director
Aflac Global Investments

General Conference



Keynote Speaker
Henry R. Kravis**
Co-Founder &
Co-Executive Chairman
Kohlberg Kravis Roberts & Co



Keynote Speaker
Larry Fink
Chairman & Chief
Executive Officer
BlackRock



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



SEO RFL Award Recipient
Verdun S. Perry***
Global Head
Blackstone Strategic Partners



Fireside Chat
Derek Jones
Vice Chairman, Private
Equity Investments
GCM Grosvenor



Emcee
Charlie Tafoya*
Co-Founder & Chief
Executive Officer
Chronograph



Fireside Chat
Kim Trick
Partner & Co-Chief
Credit Officer
TPG Twin Brook Capital Partners



Fireside Chat
Elizabeth Reed
Partner & Global Head of the
Equity Syndicate Desk
Goldman Sachs

Dear Friends,

Greetings to all those gathered today for the 16th Annual Alternative Investments Conference hosted by Sponsors for Educational Opportunity (SEO). Since 1963, SEO has organized training and internship programs and helped young people seek opportunities for service and success.

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

The SEO Scholars program 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 prosperous future.

Best wishes for a productive event and continued success.

Sincerely,


Thomas P. DiNapoli
State Comptroller



“ Since 1963, SEO has organized training and internship programs and helped young people seek opportunities for service and success. ”

Dear Friends,

It is my pleasure to extend best wishes to all those attending SEO’s 16th Annual Alternative Investments Conference (AICON).

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 the next generation 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.

Sincerely,


Brad Lander
New York City
Comptroller



“ 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. ”

Dear Friends,

Welcome to SEO’s 16th Annual Alternative Investments Conference. Our goal for this event is to help young and experienced professionals learn: the contours of the alternative investments industry; interact with its successful and influential leaders; and secure opportunities to advance within its varied segments.

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

We are especially grateful for the guidance and support we receive consistently from our 50+ members of SEO’s Limited Partner Advisory Council (LPAC). Our LPAC is comprised of investors whose combined assets under management exceed \$1 trillion. 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; TA Associates, our Signature Sponsor and to Kirkland & Ellis, KKR, and Siris, our Conference Underwriting Sponsors. Added thanks to Bank of America, Ropes & Gray, and Weil, Gotshal & Manges.

In 2009, with the wholehearted commitment of KKR and TPG, along with the support of the American Investment Council, SEO launched its Alternative Investments Fellowship Program (AIFP). Since then, the AIFP has grown to the 60+ 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 second-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.

SEO Alternative Investments has since expanded our programming to include preparing candidates for roles via the Investment Academy, Credit Academy, and Endowments & Foundations Fellowship Program.

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 Alternative Investments 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

William A. Goodloe
President & CEO
SEO



“If you are not already an SEO Alternative Investments 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.”

16TH Annual
SEO AICON
Alternative Investments Conference



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to stay up to date on the latest
and greatest!

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

Alpha Academy Partners

Credit Academy Partners

Educational Partners

Endowments & Foundations Fellowship Program Partners

8:15 AM - 9:30 AM	LP Breakfast
	<div>Welcome</div> <div><div></div><div>William Goodloe** President & CEO SEO</div></div> <div><div></div><div></div></div> <div><div>Introduction</div><div><div></div><div>Kim Y. Lew President & Chief Executive Officer Columbia Investment Management Company</div></div><div><div></div><div></div></div><div><div>Fireside Chat</div><div><div><div></div><div>Marcelia Freeman Investor Relations & Product Management Clearlake Capital Group</div></div><div><div></div><div>Ksenija Jovanovic Managing Director Aflac Global Investments</div></div></div></div></div>
8:45 AM	General Registration Begins
9:55 AM - 10:10 AM	General Welcome
	<div><div><div></div><div>Welcome William Goodloe** President & CEO SEO</div></div><div><div></div><div>Emcee Charlie Tafoya* Co-Founder & CEO Chronograph</div></div></div>
10:10 AM - 11:00 AM	Plenary Session
<div>Sponsored by:</div> <div></div> <div>BlackRock</div>	<div>Fireside Chat</div> <div><div><div></div><div>Henry R. Kravis** Co-Founder & Co-Executive Chairman Kohlberg Kravis Roberts & Co</div></div><div><div></div><div>Larry Fink Chairman & Chief Executive Officer BlackRock</div></div></div>

11:20 AM - 12:10 PM



Scan the QR Code for more details

Breakout Panels (I)

Navigating Uncertainty: Private Credit Strategies in a Shifting Economy (Breakout Room 1)

In an environment marked by rising interest rates, inflationary pressures, and economic uncertainty, private credit investors must adapt to shifting market dynamics. This panel will explore how leading fund managers and institutional investors are adjusting their strategies to mitigate risk, capitalize on dislocations, and find opportunities in a volatile credit landscape. Panelists will discuss portfolio positioning, sector resilience, and the role of private credit in today’s evolving financial ecosystem.

Sponsored by:   

Moderator:
Matt Howard, Partner, Investment Funds,
Kirkland & Ellis

Panelists:
Sandor Hau*, Managing Director & President of Credit,
Charlesbank
Nikhil Krishnan, Managing Director, Neuberger Berman
Arlene Shaw, Managing Director, Brightwood
Capital Advisors

Navigating the Evolving Investment Landscape: Trends, Strategies, and Opportunities (Breakout Room 2)

The panel will explore opportunities in the current market that are best captured through hedge fund strategies. Topics include diverse investment approaches, market inefficiencies, risk management techniques, macroeconomic trends, and strategies for delivering alpha across various asset classes.

Sponsored by:     

Moderator:
Rolando Castellanos*, Managing Director &
Alternative Investment Strategist, Bank of America

Panelists:
Priya Kaftan, Head of Investor Relations & Product
Strategy, Heard Capital
Jeffrey Kivitz, Partner & CIO of Canyon Capital
Advisors, Canyon Partners, LLC
Kevin Reevey, Senior Research Analyst, Elizabeth Park
Capital Management
Fernando Vigil*, Chief Investment Officer & Founder,
Teca Partners

The New Frontier: Charting AI’s Next Chapter (Breakout Room 3)

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 the impact artificial intelligence is having across the investment landscape.

Sponsored by:  

Moderator:
Jasmine Richards, Head of Diverse Manager
Investing & Managing Director, Cambridge Associates

Panelists:
Kenneth Chenault Jr., Co-Founder & Managing Partner,
Benchstrength
Ian Chiu*, Managing Director, Owl Ventures
Chandini Jain, CEO & Co-Founder, Auquan
Freda Kapor Klein, Founding Partner, Kapor Capital

Scan the QR Code for more details

11:20 AM - 12:10 PM

Breakout Panels (I)



Scan the QR Code for more details

Elements Impacting the Evolution and Prospects in the Private Equity Industry (Breakout Room 4)

The panel will explore key factors shaping the private equity industry’s evolution and future outlook. Topics include market trends, regulatory developments, technological advancements, shifting investor priorities, and strategies for navigating challenges and opportunities in the sector.

Sponsored by:

Moderator:
Greg Jania, Global Co-Head of Private Equity, APG Asset Management

Panelists:
Milton Berlinski*, Co-Founder & Managing Partner, Reverence Capital Partners
Rafael Mason*, Partner, Bain Capital
Joyce Schnoedl, Partner, Argand Partners
Chad Strader, Co-Founder & Managing Partner, Red Arts Capital

12:20 PM - 1:10 PM

Breakout Panels (II)



Scan the QR Code for more details

Future-Proofing Investors’ Portfolios: Sustainability as a Competitive Advantage (Breakout Room 1)

This panel will explore how sustainability is reshaping investment strategies. Attendees will gain insights into the evolving landscape, investor expectations, and innovative approaches to sustainable investing.

Sponsored by:

Moderator:
Joanne Yoo*, Partner, Development Partners International

Panelists:
Charles Feutray, Vice President, Private Credit, Blue Earth Capital
Abraham Tiarniyu*, Senior Portfolio Manager, APG Asset Management
Jimmy Yan, Head of ESG Integration, New York City Comptroller’s Office

Navigating Fundraising and Engagement with LPs (Breakout Room 2)

As the fundraising landscape becomes increasingly competitive, understanding what LPs prioritize is crucial. Hear from investor relations and fundraising professionals about effective LP engagement, breaking into a career in fundraising, and navigating fundraising cycles effectively.

Sponsored by:

Moderator:
Robert Holley*, Executive Director, Baltimore City Fire & Police Employees’ Retirement System

Panelists:
Rahel Ayalew, Director, Investor Relations, Thoma Bravo
Pamela Brylski*, MD, Head of North America Capital Formation, Helios Investment Partners
Shavonne Correia, Head of Investor Relations & Marketing, KPS Capital Partners
Dimia Fogam*, Director, Client and Product Solutions, CVC Capital Partners

12:20 PM - 1:10 PM

Breakout Panels (II)



Scan the QR Code for more details

The Finance of Entertainment (Breakout Room 3)

The panel will focus on the “Finance of Entertainment”. We will focus on why there has been a shift in the entertainment sector, the opportunities in the space, and how to select proper managers for the opportunity set.

Sponsored by:

Moderator:
Andrew Palmer, Chief Investment Officer, Maryland State Retirement and Pension System

Panelists:
Donatus Anusionwu, Managing Director, Investments, HarbourView Equity Partners
Jessica Holsey, Managing Director, GCM Grosvenor
Michelle Jubelirer, Founder of Soft Shock & Former Chair and CEO of Capitol Music Group, Soft Shock
Katie Moore, Managing Director, Hamilton Lane

Unlocking Value in Secondaries: Insights on Market Trends, Deal Flow, and Future Opportunities (Breakout Room 4)

The panel will explore the key factors influencing the growth and future trajectory of Secondary investments. Topics include market dynamics, risk management strategies, evolving investor perspectives, and the potential opportunities and challenges in these sectors of alternative investments.

Sponsored by:

Moderator:
Chirag H. Shah*, Managing Director, Campbell Lutyens

Panelists:
Trey Muldrow, Partner, Weil, Gotshal & Manges
Simon Oak, Managing Director, Lexington Partners
Kaitlyn Shao, Vice President, HarbourVest
Nicole Washington, Partner, Investment Funds, Kirkland & Ellis

1:20 PM - 1:40 PM

Lunch & SEO Reginald F. Lewis Award



Introduction
William Goodloe**
President & CEO
SEO



Presented By
Christina Lewis
Founder
Beatrice Advisors

Founder
BFO21

Vice Chair
Reginald F. Lewis Foundation



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

1:40 PM - 2:20 PM

Fireside Chat

Sponsored by:



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



Derek Jones
Vice Chairman, Private Equity Investments
GCM Grosvenor

2:20 PM - 3:10 PM

Plenary Session

Sponsored by:



Navigating a New Credit Landscape: Risks and Opportunities in 2025



Elizabeth Reed
Partner & Global Head of the
Equity Syndicate Desk
Goldman Sachs



Kim Trick
Partner & Co-Chief Credit Officer
TPG Twin Brook Capital Partners

3:30 PM - 4:20 PM

Breakout Panels (III)



Scan the QR Code for more details

Breaking Into the Buyside (Breakout Room 1)

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

Sponsored by:

Moderator:
Taj Clayton**, Partner, Litigation, Kirkland & Ellis

Panelists:
Omaira Brightman, Partner, Amity Search Partners
Eliza Lupone, Vice President, Warburg Pincus
Martha Masiarz, Director, Odyssey Search Partners
Nellie McCullough, Principal, Henkel Search Partners



Scan the QR Code for more details

The Evolving Real Estate Landscape: Opportunities in a Post-Pandemic World (Breakout Room 2)

The real estate market has undergone profound changes in the wake of the pandemic, reshaping demand across residential, commercial, industrial, and mixed-use sectors. This panel will explore the evolving trends and emerging opportunities in real estate.

Sponsored by:

Moderator:
Dev Subhash, Partner, StepStone

Panelists:
Avi Banyasz, Partner & Co-Head of TPG Real Estate, TPG
Anar Chudgar, Co-President, Artemis Real Estate Partners
David Lehman, Managing Director, HPS Investment Partners
Steven E. Orbuch, Founder & President of Sculptor Real Estate, Sculptor Capital



Scan the QR Code for more details

Emerging Managers: Navigating Challenges and Building Success Beyond Established Funds (Breakout Room 3)

The panel will explore the key challenges faced by emerging managers as they break out on their own, including sourcing, closing, and managing transactions successfully. Topics include maintaining stellar track records without the infrastructure of an established fund, navigating investor expectations, and strategies for building a strong foundation for long-term success.

Sponsored by:

Moderator:
Patricia Miller Zollar, Managing Director,
Neuberger Berman

Panelists:
Kathryn Gernert, Head of the Emerging Manager
Program, Texas Permanent School Fund
Joseph Haslip, Managing Director, Valor Equity Partners
Eric Requenez, Partner, Ropes & Gray
André Rice, President, Muller & Monroe Asset Management

3:30 PM - 4:20 PM

Breakout Panels (III)



Scan the QR Code for more details

Navigating the Capital Imbalance: How Private Credit Can Meet Today's Market Needs (Breakout Room 4)

The panel will explore the key factors shaping the role of private credit in today's market. Topics include the growing demand for flexible financing solutions, the impact of rising interest rates on deal structures, credit risk management techniques, the role of private credit in portfolio diversification, and the challenges and opportunities arising from regulatory changes and market liquidity.

Sponsored by:

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



Panelists:
Clara Fagan*, Principal, Ariel Alternatives
Amanda Lynam, Managing Director, Head of Macro
Credit Research, BlackRock
Patrick Prin, Counsel, Ropes & Gray
Josh Swidler, Managing Director & Co-CIO – Credit,
Reverence Capital Partners

4:30 PM - 6:00 PM

Networking Cocktail Reception Sponsored by:

All Day

Networking & 1:1 LP/GP Meetings



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 that close multiple opportunity gaps for hardworking young people - allowing them to succeed at competitive colleges and in coveted industries.

During William’s tenure the number of young people impacted by SEO has grown to 7,000+ per year—a 14x increase—while SEO’s annual budget has increased 12x to \$50 million. SEO is widely known for preparing low-income young people to succeed at competitive colleges—with an 85% graduation rate.

Additionally, as a nationally recognized leader in talent development, SEO has an outstanding track record in meeting the early-career hiring needs of 300+ corporate partners, including investment banks, private equity firms, and law firms.

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

William is a trustee of the Altman Foundation and Partnership Schools, and an advisory board member of the American University Kogod School of Business. He previously served on the advisory board for the Federal Reserve Bank of NY and was appointed to citywide education task forces by two different 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
Kohlberg Kravis Roberts & Co

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), Sponsors for Educational Opportunity (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.



Larry Fink
Chairman & Chief Executive Officer
BlackRock

Laurence D. Fink is Chairman and Chief Executive Officer of BlackRock. He and seven partners founded BlackRock in 1988, and under his leadership, the firm has grown into a global leader in investment and technology solutions. BlackRock's mission is to help our clients build better financial futures and the firm is trusted to manage more money than any other investment company in the world.

Prior to founding BlackRock in 1988, Mr. Fink was a member of the Management Committee and a Managing Director of The First Boston Corporation.

He serves as a member of the Board of Trustees of the World Economic Forum and is Co-Chair of the NYU Langone Medical Center Board of Trustees. In addition, he serves on the boards of the Museum of Modern Art and the International Rescue Committee. He also serves on the Advisory Board of the Tsinghua University School of Economics and Management in Beijing and on the Executive Committee of the Partnership for New York City.

Mr. Fink earned an MBA from the University of California at Los Angeles (UCLA) in 1976 and a BA from UCLA in 1974.



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 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.



Vanessa Gil
Principal
Grain Management

Ms. Gil is a Principal on the Capital Formation and Investor Relations team, responsible for collaborating across capital formation, product development and investor relations processes for Grain's existing and prospective Limited Partners and their advisors.

Prior to Grain, Vanessa was a Vice President in Bridge Investment Group's Client Solutions Group. Previously, she was also an Associate at the Blackstone Group.

Ms. Gil holds a B.S. in Business Administration and a minor in Sustainability Studies from the University of North Carolina at Chapel Hill.



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

Kim Y. Lew is the President and Chief Executive Officer of the Columbia Investment Management Company, responsible for managing the University’s endowment. She came to Columbia from Carnegie Corporation of New York, where she worked for more than a decade, most recently as Vice President and Chief Investment Officer.

Lew began her career at Chemical Bank as a credit analyst, after receiving her BS in economics from The Wharton School of the University of Pennsylvania. She went on to graduate with an MBA from Harvard Business School in 1992, after which she joined Prudential Capital Group and then the Ford Foundation, where she spent more than a decade, first as a portfolio strategist investing in the technology sector and then as a senior manager responsible for the organization’s private equity investments.



Marcella Freeman
Investor Relations & Product Management
Clearlake Capital Group

With nearly two decades of experience in financial services, in 2020, Ms. Freeman joined Clearlake Capital Group, a \$90B firm based in Santa Monica, investing in technology, industrials, and consumer across private equity, special situations, and credit. She raises capital from institutional investors globally.

Ms. Freeman was previously a Senior Vice President at EIG Global Energy Partners, where she was responsible for managing investor relationships and products globally across the platform. Prior to EIG, she was a Director at Invesco, where she was responsible for developing products and marketing funds including venture capital, private equity, and distressed strategies for Invesco Private Capital and WL Ross. Ms. Freeman began her career at the JPMorgan Private Bank and was also an Associate in the Office of the Chairman at JPMorgan Chase.

Ms. Freeman serves on the Boards of Directors of the National Association of Investment Companies (NAIO), the National Association of Securities Professionals (NASP), and of the Florida A&M University Foundation, where she serves as Chair of the Investment Committee.

Ms. Freeman received an M.B.A. from the Harvard Business School and graduated with honors from Florida A&M University with a B.A. in Finance.



Ksenija Jovanovic
Managing Director
Aflac Global Investments

Ksenija has been an active investor in the alternatives industry for 20 years. Ksenija has been at Aflac for over 6 years and is the Global Head of Alternatives, covering Private Equity, Infrastructure and Real Estate Equity investments.

Before joining Aflac, Ksenija worked on the private equity investment team at Zurich Insurance, where she focused on primary fund commitments, secondary transactions and co-investments.

Ksenija also previously held the role of Vice President at Partners Group, a private markets investment manager. Ksenija obtained her Bachelor and MBA degrees from the NYU Leonard Stern School of Business.



Charlie Tafoya*
Co-Founder & Chief Executive Officer
Chronograph

Charlie is the Co-Founder and CEO of Chronograph, provider of next-generation portfolio monitoring, valuations, and analytics 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.



Christina Lewis

Founder

Beatrice Advisors

Founder

BFO21

Vice Chair

Reginald F. Lewis Foundation

Christina Lewis is an entrepreneur, investor, philanthropist and writer who is passionate about empowering people to live their best lives.

She is the Founder of Beatrice Advisors, an independent, woman- and minority-owned multi-family office with a simple mission: to provide high-quality financial services and exceptional value to a new generation of wealthy families and individuals. Headquartered in New York City, Beatrice opened to the public in 2024.

Christina is an Executive Producer of an untitled biopic, based on her father financier Reginald Lewis’ life and posthumously-published memoir “Why Should White Guys Have All the Fun?” The project is being developed by Charles King of MACRO. She is also a member of the WIE Suite and Vice Chair of The Reginald F. Lewis Foundation.

In 2020, Christina founded Giving Gap (formerly Give Blok) a nationally-recognized platform that has channeled millions of dollars to Black causes around the United States.

In 2013, she founded All Star Code, a computer science education non-profit that dramatically increased awareness of the underrepresentation of boys of color in tech. The Obama Whitehouse honored Christina as a Champion of Change in 2014.

She is the author of “Lonely at the Top”, a short memoir published as an Amazon Kindle Single, which earned her features in Harper’s Bazaar online and the Baltimore Sun among other places.

In the early years of her career, Christina was an award-winning journalist, and spent five years as a staff writer for the Wall Street Journal and one year as a ‘night cops’ reporter in Stamford, CT.

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



Verdun S. Perry** *

Global Head

Blackstone Strategic Partners

Verdun S. Perry is the Global Head of Blackstone Strategic Partners (“Strategic Partners”), Blackstone’s dedicated secondary fund manager, with over \$81 billion of assets under management. Since 2000, Strategic Partners has been one of the market’s most prolific investors, having completed over 2,100 transactions focused on the purchase of private equity limited partnership interests and co-investments in leveraged buyout, real estate, venture capital and infrastructure assets. Mr. Perry joined Strategic Partners when it was founded in 2000 and chairs the investment committee for each of Strategic Partners’ funds.

Mr. Perry received a B.A. from Morehouse College, where he graduated magna cum laude and was elected Phi Beta Kappa, as well as an M.B.A. from Harvard Business School, where he was a Robert Toigo Foundation Fellow.

Mr. Perry is Vice Chair of the Morehouse College Board of Trustees, where he serves as a member of the Financial Sustainability Committee. Mr. Perry also serves on the boards of The Blackstone Charitable Foundation (as Chair), Sponsors for Educational Opportunity (as Vice Chair) and the Partnership for Education Advancement. He also sits on the Harvard Business School Alumni Board and the HBS Fund Council. Mr. Perry founded Blackstone’s Diverse Professionals Network (“DPN”) in 2014 and chaired the network for its first 6 years. Mr. Perry was a member of the David Rockefeller Fellows Class of 2016. In 2021, Mr. Perry was selected as a Fellow of the fifth class of the Finance Leaders Fellowship Program and a member of the Aspen Global Leadership Network.



Derek Jones
Vice Chairman, Private
Equity Investments
GCM Grosvenor

Mr. Jones is a member of the Private Equity Investment Committee and the firm’s Culture Council. He leads the firm’s private equity small and emerging managers practice. His responsibilities include deal sourcing and investment underwriting activities.

Prior to joining GCM Grosvenor, Mr. Jones was a Managing Partner at Oncore Capital, as well as a General Partner at Provender Capital. He started his private equity career at Prudential Insurance Company as part of Prudential Equity Investors, which subsequently became Cornerstone Equity Investors, where he was a partner.

Mr. Jones received his Bachelor of Arts in Economics from American University and his Master of Business Administration in Finance from New York University.

Mr. Jones serves on the Board of, and was former Treasurer to, the National Association of Investment Companies. Mr. Jones also serves on the advisory board of the American University Kogod School of Business. He is a recipient of the Pacesetter Award from the National Association of Investment Companies in 2012 and the UNCF Keeper of the Flame Award in 2016.

He was also recognized as one of the 75 Most Powerful Blacks on Wall Street by Black Enterprise Magazine in 2011. In addition, he recently joined the board of the Apollo theater.



Elizabeth Reed
Partner & Global Head of
Equity Syndicate Desk
Goldman Sachs

Elizabeth is global head of the Equity Syndicate Desk.

Prior to her current role, she served as head of the Americas Equity Syndicate Desk. Previously, Elizabeth was a member of the Investment Grade and Emerging Market Credit Syndicate team from 2009 to 2017. She joined Goldman Sachs in 2007 as an analyst within Americas Leveraged Finance, was named managing director in 2017 and partner in 2022.

Elizabeth earned a BBA in Finance from the Mendoza College of Business at the University of Notre Dame in 2007.



Kim Trick
Partner & Co-Chief
Credit Officer
TPG Twin Brook Capital Partners

As a Partner and Co-Chief Credit Officer at TPG Twin Brook Capital Partners, Kim Trick oversees the business’s underwriting, credit, and portfolio management functions. She is also a member of TPG Twin Brook’s Investment Committee.

Prior to joining TPG Twin Brook in 2016, Kim worked for Chase Capital, a division of JPMorgan Chase, where she originated and underwrote senior and junior cash flow loans to privately-owned and sponsor-owned middle market companies throughout North America. Prior to joining Chase Capital, Kim worked at JPMorgan’s Investment Bank. Kim received her B.B.A. in Finance, cum laude, from the University of Notre Dame.

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SEO Scholars is a free, eight-year academic program that gets public high school students in New York City, San Francisco, North Carolina, and Miami to and through college – **with an 85% 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
- Summer enrichment
- College admissions advising
- Tutoring
- One-on-one mentoring

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

- College readiness workshops
- One-on-one support
- Individualized academic advising
- Career exploration and networking events

85%
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

75%+
of SEO Scholars attend a school ranked as top-100 in *U.S. News & World Report*

For more than 40 years, SEO Career has prepared college undergraduates for summer internships on Wall Street and beyond, including commercial real estate, technology, and corporate America, usually leading to coveted, full-time jobs. SEO Career’s training and mentoring helps in closing the career opportunity gap for motivated young people.

Internship Areas include:

- | | |
|---------------------|----------------------|
| Asset Management | Private Equity |
| Consulting | Real Estate |
| Finance/Accounting | Sales |
| Human Resources | Sales & Trading |
| Investment Banking | Technology |
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~80%
of SEO Career Interns in the past 10 years have received full-time offers from SEO partner companies

820+
college students in the SEO Career Summer Intern Class of 2024

165+
partners in 60+ cities and remote

9,300+
alumni

SEO Tech Developer provides hands-on learning and coding experience to computer science and engineering college students, preparing them for the most competitive tech internships and taking them 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 as 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



125+
participants in the 2024 cohort

75%
of participants to date have completed summer tech internships

90%+
of eligible Tech Developer participants have received full-time job offers in the tech sector

300+
alumni

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 programs**, fellows receive in-depth development, including intensive mock interviews, case studies, financial modeling, and exposure to breakfast seminars led by senior management from 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 with various platforms and opportunities to network with limited partners.



90%
of fellows secure offers

550+
candidates in pipeline

90+
partners

SEO Law helps future lawyers thrive in law school and excel in their careers. Through our two program initiatives, the SEO Law Fellowship and SEO Law Catalyst, aspiring 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 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



184
Fellows in the Class of 2024

43
partners in 13 cities around the nation

2,100+
alumni

48
Catalyst participants in the Class of 2024

The SEO Leadership Institute supports SEO alumni at every stage of their career. 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 their careers on a strong foot.

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




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Onex has approximately \$51.1 billion in assets under management, of which \$8.3 billion is Onex’ own investing capital. Onex and its experienced management teams are collectively the largest investors across Onex’ platforms.

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- Respect
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- Ownership Mentality
- Well being
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