

8:00am - 9:15am LP Breakfast

Sponsored by: 

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,
AroLight Capital Partners

Fireside Chat



Daniel Revers
Founder &
Managing Partner
AroLight Capital Partners



Melissa Ding
Director, Infrastructure
Private Equity
BlackRock

8:30am General Registration Begins

9:30am - 10:20am Plenary Session

Sponsored by: 

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

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

Credit: Manager Investment Insights (Breakout Room 1)
Leading Credit Fund Managers will provide insights to the current market and outline the opportunities their strategies look to capture amid today's volatile market landscape.

Sponsored by: 

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)
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: 

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)
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: 

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



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10:45am - 11:35am

Breakout Panels (I)



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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: 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

11:45am - 12:35pm

Breakout Panels (II)



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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.

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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



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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:

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

11:45am - 12:35pm

Breakout Panels (II)



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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.

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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



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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:

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

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:



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



Cheryl Mills
Founder & Chief
Executive Officer
Blacklvy Group

1:45pm - 2:25pm

Plenary Session

Sponsored by:

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

2:50pm - 3:40pm

Breakout Panels (III)



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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: **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)

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:

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)

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:

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)



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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 MANAGEMENT

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:



Diversity and Inclusion in Sports Management and Investment



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



Lara Price
Chief Operating Officer
Philadelphia 76ers



Jasmine Robinson
Managing Partner
Monarch Collective

4:45pm - 6:00pm

Networking Cocktail Reception Sponsored by: TPG

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 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.