



# THE PRIVATE MARKETS TEXAS MEETING

Austin Proper Hotel, Austin, TX

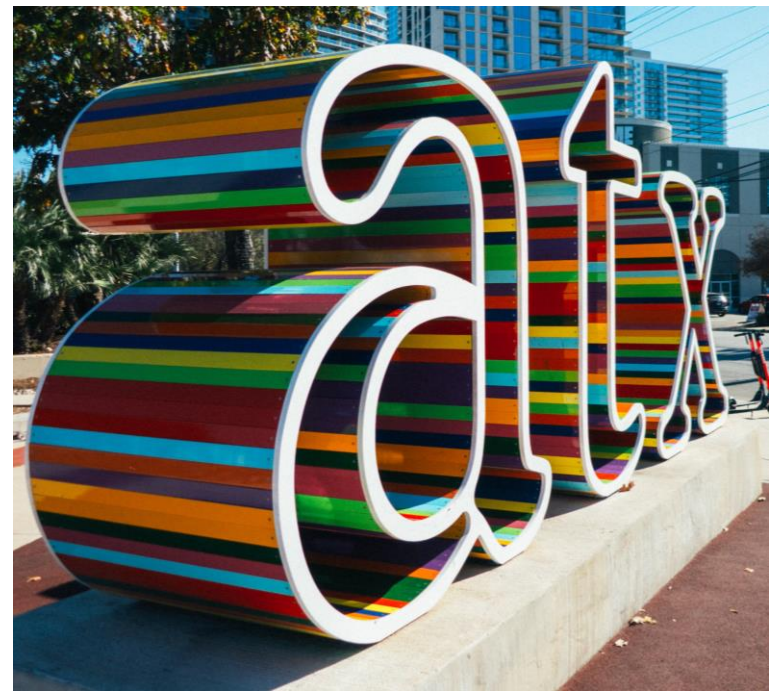
(Formula 1: Grand Prix Americas Week)

October 19<sup>th</sup> & 20<sup>th</sup>, 2022

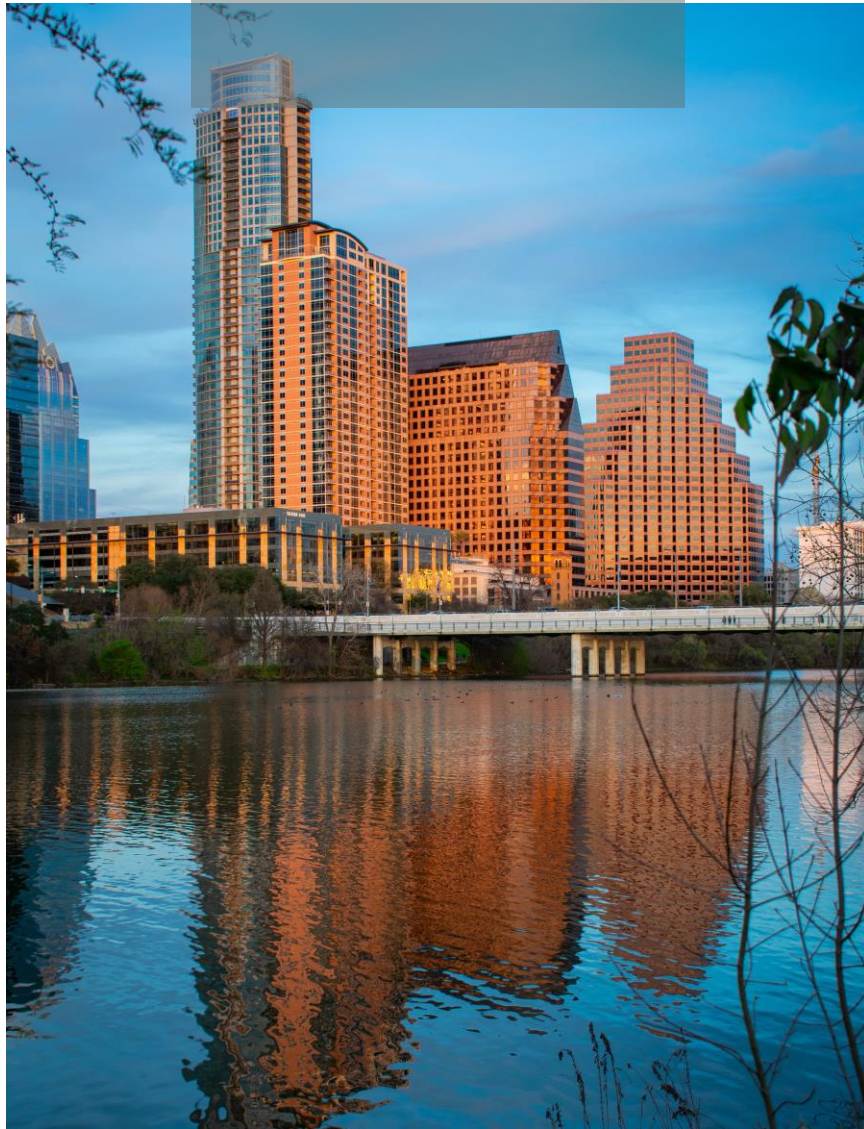


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# THE PRIVATE MARKETS TEXAS MEETING

AUSTIN PROPER HOTEL, AUSTIN, TX– OCTOBER 19TH & 20TH, 2022

Dear Colleague,

It is with great pleasure that I invite you to join us at the Fifth Annual Private Markets Texas Meeting during Grand Prix week in Austin. This exclusive institutional gathering brings together the most important and active institutional allocators and family offices that are investing in Private Equity, Venture Capital, Digital Assets, Secondaries, Private Credit and Real Assets. Over 250 C-Level LP & GP professionals will come together to network and discuss investment opportunities, allocations, and the performance of all Private Markets related asset classes.

The conference precedes the Formula 1 race weekend. It is a full day conference with a pre-event mixer. The conference is closed to the media and follows chatham house rule therefore there is no virtual attendance option.

We look forward to hosting you in person.

Best,

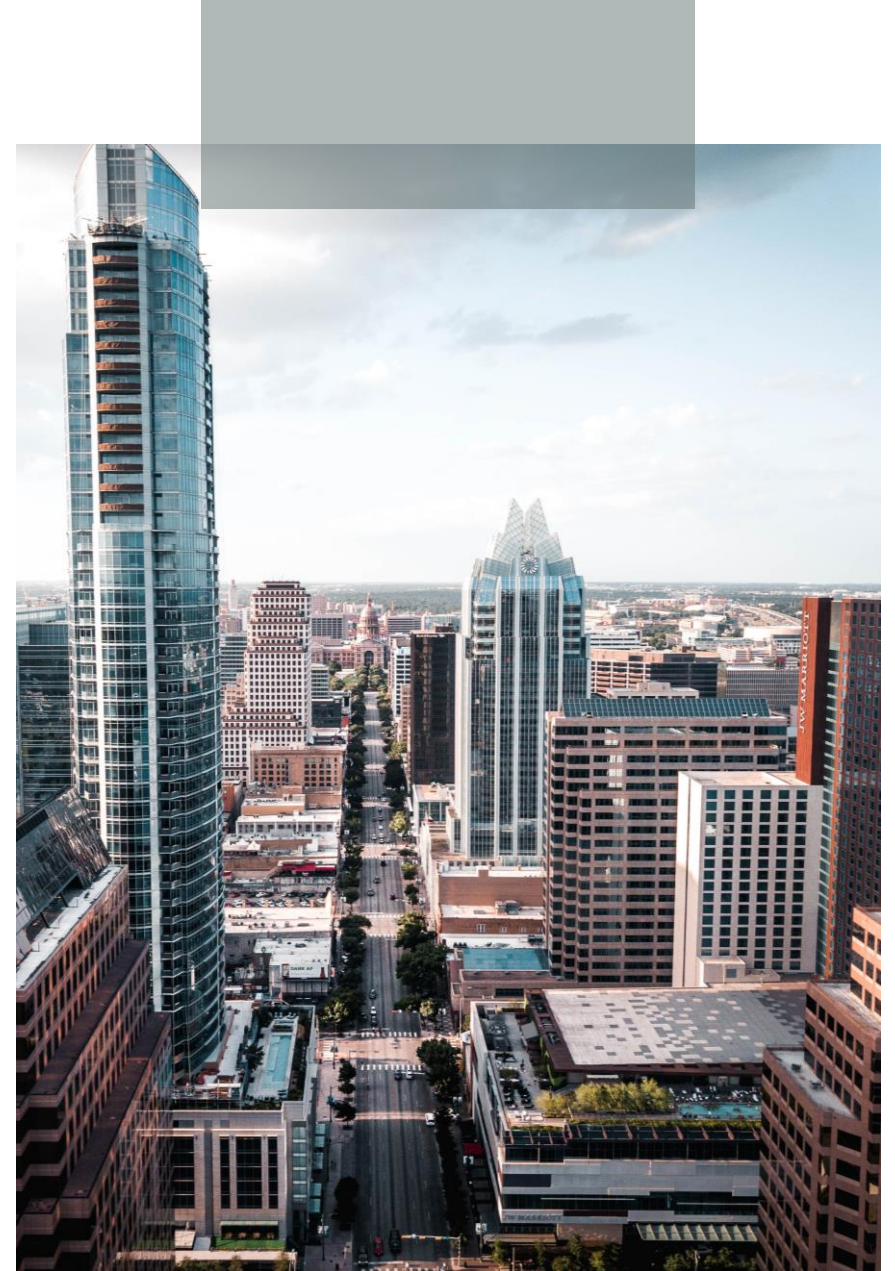
Roy Carmo Salsinha  
President, CEO  
Carmo Companies



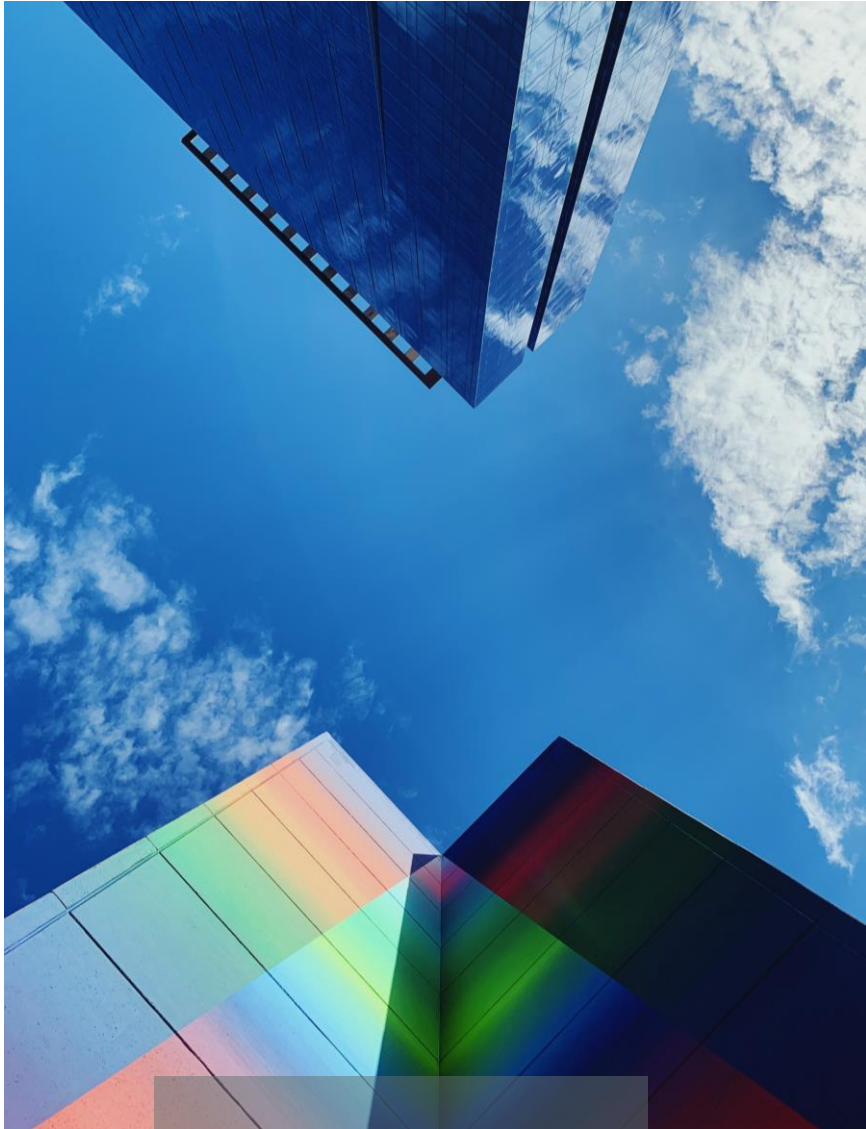
# BY THE NUMBERS

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- \$5+ Trillion AUM in attendance
- 250+ Total participants
- 125+ Institutional & Private Wealth Investors
- 125+ Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking/Speed Dating
- 1 Full day Conference
- 1 Pre-Event Networking Cocktail
- 7 Days of Slack networking tool access







# IN ATTENDANCE

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## C-Level Executives

- Corporate Pension Funds
- Endowments
- Foundations
- Private Equity Funds, Venture Capital Firms, Real Estate Firms,
- Hedge Funds
- Public Pension Funds
- Fund of Funds
- Sovereign Wealth Funds
- Family Offices, Multifamily Offices and Private Banks
- Government officials
- Economists
- Banks and Investment Banks
- Lawyers
- Auditors
- Commercial Service Providers
- Private Debt Funds

# INSTITUTIONAL PARTNERS



Livestrong



ROBERT F.  
KENNEDY  
HUMAN  
RIGHTS

COMPASS  
INVESTORS





# SPONSORS

## APOLLO

Apollo is a global, high-growth alternative asset manager. In our asset management business, we seek to provide our clients excess return at every point along the risk-reward spectrum from investment grade to private equity with a focus on three business strategies: yield, hybrid, and equity. For more than three decades, our investing expertise across our fully integrated platform has served the financial return needs of our clients and provided businesses with innovative capital solutions for growth. Through Athene, our retirement services business, we specialize in helping clients achieve financial security by providing a suite of retirement savings products and acting as a solutions provider to institutions. Our patient, creative, and knowledgeable approach to investing aligns our clients, businesses we invest in, our employees, and the communities we impact, to expand opportunity and achieve positive outcomes. As of June 30, 2022, Apollo had approximately \$515 billion of assets under management. To learn more, please visit [www.apollo.com](http://www.apollo.com).



## ASHFORD

Ashford is a leading asset manager with extensive experience acquiring, managing and operating real estate assets. The firm is led by a seasoned team of senior executives, each of whom has extensive investment and real estate experience and who collectively have over 100 years of real estate investment and operations experience. Ashford has engaged in a full spectrum of transaction risk and complexity, ranging from ground-up development to opportunistic acquisitions requiring significant asset re-positioning. During its more than 40 years as a real estate owner, operator, asset manager and investor, Ashford has successfully invested in and managed properties through multiple economic cycles and developed deep industry and brand relationships.



ATX Venture Partners founded by tenured principal execs from large AUM funds to include Millennium, Virtus, Perry Capital in addition to having significant exits as technology founder/operators via IPO, acquisition, and PE. This gives us a unique skillset as operator-investors which is key to building a successful VC fund and producing compelling returns. The fund is based in the hotbed of Austin, Texas and primarily focuses on companies outside of the mature and overcapitalized markets of CA, NY & MA. We lead and co-lead rounds, build a concentrated portfolio with active board seats and offer co-invest to our LPs for later stage rounds, secondaries, and special situations. Our baseline target return profile is 5X MOIC & 25% IRR, we launch a new fund ever 2.5 years, and deliberately keep our AUM under \$125M in primary funds. 80% of our initial investments receive follow-on funding.

## cerberus

Since 2008, the Cerberus Residential Opportunities platform is a global market leader and pioneer in residential assets across both debt and equity. Today, the platform has grown to nearly \$15bn in AUM of which over \$5bn is invested in Single-Family Rental ("SFR") real estate. In 2015, we launched our Single-Family Rental ("SFR") Strategy and built out an investor-owned property manager, FirstKey Homes, by leveraging the broader firm's 30 years of operational private equity expertise. The SFR Strategy is one in which we acquire, renovate, rent, and maintain single-family standalone residences. FirstKey Homes applies a technology forward, institutionalized approach in managing a portfolio of over 43,000 homes across the South, Southeast and Midwest. Our dedicated, commingled SFR fund launched in January 2021 and offers unique alignment by enabling investor access to FirstKey Homes. Returns are generated from a combination of Home Price Appreciation ("HPA") and rental income. As one of the largest national private SFR operators, we are poised for future growth as the asset class continues to institutionalize.



# SPONSORS



With a combined 60 years of professional experience across investing, technology, and cybersecurity, we create investment vehicles in the cryptocurrency space which seek to generate asymmetric risk-adjusted returns. Our mindset is focused on anti-fragility, meaning we like volatility. Markets are not linear; in our view, they're typically elastic. To us, these are opportunities, not challenges. Volatility is where we began since we started in crypto, so we're adapted to make the most of it. Our two live battle-tested funds are designed to generate consistent returns as much as possible, despite highly inconsistent markets. We are three friends, colleagues, and business partners who are passionate about and dedicated to being the best in the cryptocurrency space.



Greenfield Partners is an Israel-based investment firm focused on early growth stage technology and tech-enabled businesses. With a dual presence in Tel Aviv and New York, our team fuses investment and operating experience, deep local Israeli roots, and an expansive global network to support entrepreneurs in their quest to build thriving technology companies. Our roots date back to 2016, when we were established by TPG Growth as an investment platform for early growth technology investments in Israel. An independent fund since 2020, our culture remains grounded in this heritage, bringing the rigor and depth of private equity to early growth investing. Greenfield Partners manages over \$500m in assets across its investment vehicles.



ICM Asset Management is a registered Investment Fund Manager and Portfolio Manager, founded in 2003 to preserve and grow the wealth of retail, private client and institutional investors looking to diversify their portfolios through the use of alternative asset classes. Today, we manage more than \$1.6 billion of assets and offer an array of investment opportunities focused on real estate, private equity / venture capital, and alternative income strategies. We are headquartered in Calgary and have offices in Atlanta, Munich and Mexico City. ICM Investment Management, a wholly owned subsidiary of ICM Asset Management, is a registered investment fund manager (IFM) and portfolio manager (PM) with provincial securities regulators across Canada.



Insight Equity is a private equity firm with ~\$1.4 billion of capital under management that makes control investments in strategically viable, middle market companies striving to achieve their full potential. Insight Equity's experienced principals have acquired and managed businesses with over \$4B in aggregate revenue since 2000. Insight Equity has expertise in complex or challenging situations and has the ability to execute quickly in circumstances where speed is a priority. The firm leverages a proven collaborative value creation model to facilitate operational improvements leading to significant cash generation and growth. Insight Equity's headquarters is conveniently located near the Dallas / Ft. Worth International Airport in Southlake, Texas. The firm also has an office in New York City.





# SPONSORS



Lexington Partners is a leading global alternative investment manager primarily involved in providing liquidity solutions to owners of private equity and other alternative investments and in making co-investments alongside leading private equity sponsors. Lexington Partners is one of the largest managers of secondary acquisition and co-investment funds with \$55 billion in committed capital since inception. Lexington has acquired over 3,900 secondary and co-investment interests through more than 1,000 transactions with a total value in excess of \$69 billion, including \$17 billion of syndications. Lexington also invests in private investment funds during their initial formation and has committed to more than 550 new funds in the U.S., Europe, Latin America, and the Asia-Pacific region. Lexington has offices strategically located in major centers for private equity and alternative investing - New York, Boston, Menlo Park, London, Hong Kong, Santiago, São Paulo and Luxembourg.



LotusGroup companies have been helping our capital Partners access alternatives since 2009. We are focused on uncorrelated returns, income generation, and capital preservation. In 2018, we launched our single strategy life settlements fund, the LotusGroup Longevity Fund. The strategy offers investors efficient access to a diversified and growing portfolio of rigorously underwritten policies. With a differentiated approach and a seasoned in-house team, the Fund is well-positioned for more uncorrelated success. All of us at LotusGroup Capital (LGC) believe that by “Doing the Work” we add value and help our capital Partners maximize their potential. To learn more, please visit us at [www.lotusgroupcapital.com](http://www.lotusgroupcapital.com).



Founded in 2014, March Capital Management (“MCM”) is a woman- and minority-owned real estate investment and development firm headquartered in San Francisco. We focus on repositioning, developing and extracting the “highest and best use” out of underutilized properties in high growth, supply-constrained markets. Our goals are to create well-designed sustainable projects, support and revitalize communities, and deliver exceptional investment performance. As an established fund operator with deep market expertise and established relationships, we take an innovative and hands-on approach to management and execution. Since inception, MCM has deployed over \$700 million across 40 investments. Of which, MCM has realized \$168 million across 25 investments with a median project IRR of 35%. MCM HAS NEVER LOST MONEY ON AN INVESTMENT.



Measure 8 was launched in 2018 by private equity veteran Boris Jordan, founder of Curaleaf Holdings, the largest cannabis company by revenue. Created to capitalize on the emergence of the U.S. and global cannabis industry, Measure 8 manages VC and HF vehicles to capture the range of opportunities across different investment horizons and in both public and private markets. The team's experience, prior operational roles and successful cannabis track record place the firm at the epicenter of the industry, with a global network leading to proprietary deals and preferred terms. The firm's focus on select strategic relationships and its ability to provide operational assistance and ecosystem benefits make Measure 8 a preferred partner to portfolio companies. Measure 8 deployed the most capital of any cannabis VC over the past two years, according to Business Insider.



# SPONSORS



Nasdaq Asset Owner Solutions unites the most comprehensive institutional data from eVestment with true multi-asset class portfolio analytics and services from Solovis to deliver transparency and decision support throughout the investment lifecycle – from strategic planning, researching new investment opportunities, analyzing your current portfolio, and keeping your stakeholders informed. The industry's only comprehensive suite of solutions for asset owners. Empowering the world's asset owners to make better investment decisions through the power of capital markets, data, and technology.



Northleaf Capital Partners is a global private markets investment firm with more than US\$20 billion in private equity, private credit and infrastructure commitments raised to date from public, corporate and multi-employer pension plans, endowments, foundations, financial institutions and family offices. With offices in Toronto, Chicago, London, Los Angeles, Melbourne, Menlo Park, Montreal and New York, Northleaf's 200-person team is focused exclusively on sourcing, evaluating and managing private markets investments globally. Northleaf's portfolio includes more than 500 active investments in over 40 countries, with a focus on mid-market companies and assets.



As an alternative asset manager in the global residential credit markets having managed in excess of \$20.7 billion of loans and real estate since 2012, the Firm invests in, and actively manages, residential loans and real estate-related strategies. Palisades currently manages a diverse portfolio of residential loans and real estate with notional balance of approximately \$7.1 billion with underlying properties located in the United States, Europe and Latin America.



Partners Group is a leading global private markets firm. Since 1996, the firm has invested over USD 170 billion in private equity, private real estate, private debt, and private infrastructure on behalf of its clients globally. Partners Group seeks to generate strong returns through capitalizing on thematic growth trends and transforming attractive businesses and assets into market leaders. The firm is a committed, responsible investor and aims to create sustainable returns with lasting, positive impact for all its stakeholders. With USD 127 billion in assets under management as of 31 December 2021, Partners Group provides an innovative range of bespoke client solutions to institutional investors, sovereign wealth funds, family offices and private individuals globally. The firm employs more than 1,500 diverse professionals across 20 offices worldwide and has regional headquarters in Baar-Zug, Switzerland; Denver, USA; and Singapore. It has been listed on the SIX Swiss Exchange since 2006 (symbol: PGHN).



# SPONSORS



Peachtree Hotel Group (“Peachtree”) is a real estate private equity investment firm investing primarily in hospitality. Since its founding in 2008, the company has completed hundreds of real estate investments valued at more than \$6.4 billion in total market capitalization and currently has \$2.1 billion in equity under management. Based in Atlanta-Georgia, Peachtree finances, owns, operates, manages and develops hotels throughout the U.S. The company’s current portfolio comprises 200 commercial loans under management and 80 owned and third-party managed hotels across 23 brands, with more than 9,700 rooms located in 18 states.



Pillar Commercial (“Pillar”) is a minority-owned, vertically integrated commercial real estate investment and operating platform based in Dallas, Texas. Since 2004, the company has focused exclusively on middle-market office and industrial property investments. Pillar has established a proven track record with a broad spectrum of investors that include large institutional groups, pension systems and family offices. The company has capitalized investments through single-purpose JV partnerships, programmatic joint ventures and discretionary fund vehicles. In 2023, Pillar will launch its second fund vehicle, Pillar Real Estate Fund II (PREF II). PREF II will target select middle market (\$15M - \$75M) office and industrial properties in the Texas Triangle, a mega-region that encompasses the four major metro areas of Texas. In 2018, Pillar launched its first fully discretionary vehicle, Pillar Real Estate Fund I (PREF I). Under PREF I, Pillar implemented the same strategy albeit under a GP structure. By investing in PREF II, investors will have the benefit of aligning with a sponsor who has a proven track record with this specific strategy.



Raven Capital Management LLC (“Raven”) has approximately \$2 billion in AUM across its opportunistic (including music and media IP), credit and real estate investment strategies since its launch in 2008. Raven is both a valued partner and a formidable presence in these industries offering differentiated access to middle market credit and distinct asset acquisitions. The privately owned firm has become a leader in direct asset-backed loans and cash-generating assets for its opportunistic strategies, secured unleveled loans for its credit investments and is the largest rent-by-the-bed developer for its real estate endeavors. Raven has 25 employees, with offices in New York and Santa Monica.



Red Dot Storage is the leading contactless, tech-forward self-storage platform with 196 properties across 18 states. We acquire and operate performing assets in lower competition non-primary markets that benefit from our modern revenue management strategies, grounded in data science, and our industry-leading cost structure. Targeted capital investment unlocks embedded value in properties. Proprietary, homegrown software drives operating leverage, allowing a single employee to manage up to seven facilities in a territory





# SPONSORS

## SAPPHIRE VENTURES

Sapphire is a leading global technology-focused venture capital firm with more than \$10.2 billion in AUM with team members across Austin, London, Palo Alto and San Francisco. For more than two decades, Sapphire has partnered with visionary management teams and venture funds to help scale companies of consequence. Since its founding, Sapphire has invested in more than 165 companies globally resulting in 30+ IPOs and 45+ M&A exits. The firm's investment strategies — Sapphire Ventures, Sapphire Partners and Sapphire Sport — are focused on scaling companies and venture funds, elevating them to become category leaders. Sapphire's Portfolio Growth team of experienced operators delivers a strategic blend of value-add services, tools and resources designed to support portfolio company leaders as they scale. To learn more about Sapphire, visit: <https://sapphireventures.com>



Founded in 2010, Star Mountain Capital is a lower middle-market direct lending manager focused on two investment strategies: 1) providing debt and equity capital to established, growing small and medium-sized companies; and 2) purchasing LP positions, generally at a discount, from other investors in lower middle-market funds. Star Mountain manages +\$3 billion of AUM through funds and SMAs for some of the world's most sophisticated investors, including individuals, family offices, insurance companies, wealth managers, endowments / foundations, and pension plans. Star Mountain is 100% employee-owned and 100% of employees share in the investment profits across 90+ full-time team members and senior advisors/operating partners. Star Mountain's specialty is helping grow privately-owned businesses, both organically and through acquisitions, that have at least \$15 million of annual revenues and under \$50 million of EBITDA. Star Mountain has closed over 135 direct investments and 25 secondary / fund investments since its inception.

## TITAN

Titan's strategy is to provide secondary capital to shareholders and LP's in Israeli global internet, software, consumer, and financial technology companies. Liquidity is used to align, rebalance and reposition shareholder bases in order to allow management to focus on an out-sized exit, while taking advantage of shareholders' need for liquidity. Titan has an experienced team that is monitoring more than >2500 shareholders in more than 300 tech companies. Titan is building on its secondary market transaction expertise for gaining exposure to tech companies that demonstrate strong financial performance at the attractive entry points (sweet spot \$100-\$500M market cap). Titan is targeting 3x / 30% IRR and returns are driven by privately negotiated discounts and entering into companies between rounds. In addition to the main fund, TCP is a frequent source for co-investments to its LPs. TCP has a unique skill set to execute this market opportunity with limited competition. Titan Capital Partners (TCP) is founded by Ben Topor, ex-head of secondary in one of Israel's largest funds and is backed by financial institutions, and global family offices and plans a second closing of the fund in Q4 2022. Titan is looking forward to adding select additional LPs over the coming months.

## WHITESTONE & CO.

We create value by acquiring single-family homes below replacement cost and within the path of revitalization in mid-tier U.S. cities. We utilize government agencies and NGOs to place residents via the Section 8 voucher housing program. Our strategy enables investors to participate in a market opportunity that targets positive cash flow, while having a positive impact on people and communities. What one might find unique about our fund to that of others is who we service. We service 66% of the population as opposed to the more expensive rents (16%), acquiring homes at 10-12 caps and cash-flowing day one.

## Kevin Vandolder

Investment Consultant, AndCo Consulting (Austin)



Kevin Vandolder is a consultant for AndCo and resides in Spicewood just outside of Austin. Kevin previously was a Senior Consultant with DiMeo Schneider leading their practice management efforts in the southern region. Prior to joining DiMeo late in 2019, Kevin was a Partner and DC Client Practice Leader with Aon Hewitt and predecessor firm EnnisKnupp for 24 years. He holds an MBA from New York University's Stern School of Business and a Bachelor's of Commerce degree in Finance from the Odette Business School at the University of Windsor. Kevin is CFA Charterholder, a member of the CFA Society of Austin. Kevin is a founding member and previous member of the Executive Committee of the Defined Contribution Institutional Investment Association (DCIIA) and currently is serving on the leadership team of the Investment Policy and Design committee as we enter 2021. He has been a guest lecturer at DePaul and Northwestern University, was the previous President and Treasurer of the CFA Society of Chicago and for several years graded and help set the CFA examination. Kevin previously served in the Royal Canadian Navy and Presbyterian World Service. In his free time, he enjoys tennis and padel matches, working around his ranch and as a native Canadian -- poutine. Kevin has 29 years of industry experience.

## Scott Ramsower

Head of Private Equity Fund Investments, Teacher Retirement System of Texas (Austin)



Scott Ramsower leads the Private Equity Funds Team at the Teacher Retirement System of Texas (TRS). Through his role at TRS, Scott has oversight responsibilities for the group's approximately \$33 billion private equity fund investment portfolio. In addition, he is a member of the Private Equity Investment Committee and Management Committee, through which he assists in the strategy and development of the overall private equity team and portfolio. Scott is also a member of the ILPA Board of Directors and an ILPA Faculty Member, helping to educate fellow practitioners in the private equity industry. Prior to joining TRS in 2010, Scott was in the New York office of AlInvest Partners, a leading private equity investor with over €35 billion in AUM. At AlInvest, Scott focused on evaluating new private equity fund commitments to various strategies around the globe. Prior to AlInvest, Scott was an associate in the equity research department of Morgan Stanley. Previously, he also worked in the consulting practice at PricewaterhouseCoopers. Scott received a BBA, Finance from Texas A&M University.

## Yola Ozturk

Principal & General Partner, March Capital Fund (San Francisco)



Ms. Ozturk is a highly accomplished real estate executive with over 27 years of industry experience. Ms. Ozturk is the co-founder of March Capital Management and has been the Managing Principal since inception. Ms. Ozturk's key functions include being extremely hands on in all facets of the development cycle, which include but are not limited to acquisition, due diligence, debt financing, entitlement, permitting, architectural design and construction management. Prior to co-founding MCM, Ms. Ozturk was a top producing real estate agent in San Francisco. Before her successful career in selling and investing in Real Estate, she was a Management Consultant at Mercer Management Consulting and subsequently was Head of Product Marketing at Fourelle Systems in Silicon Valley. Ms. Ozturk holds a Master of Business Administration from Yale School of Management, a Master of Science in Computer Science from ESIB, and a Bachelor of Science in Electrical Engineering from ESIB. Ms. Ozturk was born and raised in Lebanon and France and fluently speaks Arabic and French.



## Ryan DeMattia

Founder & Managing Director, Coindex Capital Management (Atlanta)

Ryan is the founder and Managing Director of Coindex Capital Management where he manages a series of non-directional crypto funds that have outperformed many crypto and traditional market benchmarks since inception with virtually no correlation to crypto or the stock market. Ryan is a tech expert, cryptocurrency early adopter and quantitative analyst, originally published on Bitcoin in 2011. He has bootstrapped previous startups and has 10+ years trading and modeling emergent and exotic markets, with a statistical background concentrated on simulation modeling.



## Michael Sexton

Private Equity Services, Partners Group (Denver)

Michael Sexton is part of the Private Equity Services business unit, based in Denver. He is a member of the Private Equity Direct Co-Investments and Direct Lead Growth Investments in Services Investment Committee. He has 14 years of relevant industry experience. Prior to joining Partners Group, he worked at OMERS Private Equity in New York, a USD 12 billion private equity fund focused solely on direct, control middle-market investing in North America and Europe. While at OPE Michael was responsible for all aspects of sourcing and evaluating new investment opportunities and was involved with three portfolio company boards to support management in the areas of strategic planning, operations and finance. He holds an MBA from the Kellogg School of Management, Northwestern University, Illinois, USA and a BSB from the University of Minnesota, USA.



## John Ide

Managing Director, Star Mountain Capital (Chicago)

Mr. Ide is a senior executive with 30+ years of experience advising some of the world's largest and most sophisticated institutions and family offices on their investments as well as strategically guiding operating companies as their trusted corporate banker and lender. Mr. Ide spent approximately 22 years at JPMorgan Asset Management, the \$2+ trillion AUM investment manager that is part of the international commercial and investment banking group JPMorgan Chase (NYSE: JPM). As a Managing Director and member of the Strategic Client Group, he oversaw some of the largest and most sophisticated institutional clients and also served on various internal management committees. He oversaw approximately \$20 billion of client capital invested across a broad range of global strategies including JPMorgan's then affiliated \$15+ billion AUM Highbridge Principal Strategies' private credit, mezzanine and special situations funds. Mr. Ide was most recently a Managing Director at Deerpath Capital Management, a \$2+ billion AUM private credit manager focused on senior lending to private equity owned companies in the U.S. lower middle-market.





## Sharmila Kassam

Head of Nasdaq Asset Owner Solutions, Nasdaq (Austin)

Shar Kassam is an investment executive and recognized thought leader focused on operational efficiencies, financial innovation and pressing priorities of asset owners. She was the Deputy Chief Investment Officer of the \$35+ billion Employees Retirement System of Texas (Texas ERS). She managed investments across asset classes, her internal investment team and external managers. She was responsible for overseeing asset allocation, risk management, pursuing new initiatives, new investment structures and developing the highest levels of governance. She was a change agent working through various phases of the Texas ERS allocation into alternatives. She also reviewed the investment products for the \$3+ billion Texa\$aver 401(k)/457 Plan. She spearheaded ESG and DEI programming, including the launch of an emerging manager program to invest in small and/or minority managers. She holds a BBA in Accounting (with honors) and a J.D. from The University of Texas at Austin.



## Steven Kim

Partner, Investment Strategy and Risk Management, Verdis Investment Management (Philadelphia)

Steve Kim is a partner at Verdis Investment Management, directing investment strategy and risk management for the family office. He is an active member of the Investment Committee and has been with the firm since inception. With a focus on buyouts, marketable securities and venture capital, he has been behind investments in over 60 fund managers globally. Beyond his investment background, he brings more than 30 years of experience building and implementing operating infrastructures for venture capital and private equity firms, as well as public and private companies. Before becoming a family office investor, he helped build and lead the technology development and service delivery organizations at Orcom Solutions/Alliance Data Systems, Peopleclick, Clear Communications, Alcatel, Fujitsu and Daleen Technologies. Steve began his career at the Walt Disney Company, serving on the information technology team that helped open what is now Disneyland Paris. He earned his bachelor's degree from the University of Central Florida and serves on the Board of Governors for the The International Baccalaureate.



## Mike Krems

Private Equity Portfolio Strategies, Aksia (San Diego)

Mike is on the Portfolio Advisory team and has over 19 years of private equity, credit and co-investing experience. He is responsible for alternative investment portfolios in the Americas with a focus on developing private equity portfolio strategies and building co-investment portfolios. Prior to Aksia's acquisition of TorreyCove Capital Partners, Mike was a Managing Director of TorreyCove Capital Partners, where he was responsible for the identification, due diligence, and selection of private equity and credit investments, including co-investments. Prior to that, he was a Senior Vice President at Pacific Corporate Group in a similar capacity. Mike previously worked at Smith Breeden Associates, a fixed income money manager where he worked on the corporate bond trading desk. Mike graduated from Duke University with a BS in Economics. He holds an MBA from the Wharton School at the University of Pennsylvania and is a CFA charterholder.



# SPEAKERS

## Dory A. Wiley

President & CEO, Commerce Steet Holdings (Dallas)



Dory A. Wiley is President & CEO of Commerce Street Holdings, LLC, the holding company for Commerce Street Capital, LLC (“CSC”), a FINRA member broker/dealer and Commerce Street Investment Management, LLC (“CSIM”), an SEC-registered investment advisor. Since co-founding the firm in 2007, his primary focus has been the creation and management of investment funds that specialize in financial institutions and related derivatives. Mr. Wiley serves on the Boards and Investment Committees of CSIM’s investment funds. He formerly served as a member of the Board of Trustees of the Teacher Retirement System of Texas, an approximately \$100 billion pension fund where he was Chairman of the Investment Committee. Mr. Wiley has over 20 years of experience in commercial and investment banking and investment management. Prior to his current position with Commerce Street, Mr. Wiley was President of SAMCO Capital Markets, LLC, which he joined in August 1996. Prior to SAMCO, he was Vice President and Manager of the Financial Institutions Group at Rauscher Pierce Refsnes, now RBC Capital Markets. Mr. Wiley received a BBA in Finance and Accounting from Texas Tech University, and an MBA from Southern Methodist University.

## Alan Weinfeld

Partner, Invesco Private Capital (New York)



Alan Weinfeld is a Partner at Invesco Private Capital. In this role, he shares responsibility for portfolio management, including sourcing, portfolio allocation, investment due diligence, as well as post-investment monitoring of partnership funds and direct investments. He is active in the group’s marketing and fundraising activities. Mr. Weinfeld is also a member of the Investment Committee. Mr. Weinfeld joined Invesco in 2020. Prior to joining the firm, he was an investment partner at Gatewood Capital Partners, a private equity firm focused on seeding emerging managers, where he played a role in the origination and execution of private equity and private credit seed fund investments. In addition, Mr. Weinfeld shared responsibility for fundraising and marketing as well as the firm’s underlying fund relationships. Before that, he was a partner and managing director at GoldPoint Partners, New York Life’s private equity manager. Mr. Weinfeld spent 13 years at Franklin Templeton Investments, where he held several senior positions with a focus on private equity and investor relations. He has been in the industry since 1997. Mr. Weinfeld earned a BA degree, magna cum laude, from Tulane University. He is a Chartered Financial Analyst® (CFA) charterholder.

## Timothy R. Bray

Director of Alternative Investments, GuideStone Capital Management (Dallas)



Tim Bray is the principal Portfolio Manager for investment advisory clients as well as organizational capital accounts and oversees the alternatives investment team of GuideStone. He is responsible for portfolio construction of the accounts and leading the analyst research team and investment process for non-registered strategies, including alternative strategies, on GuideStone’s platform. Mr. Bray serves as a voting member on internal investment committees. Mr. Bray joined GuideStone in 2006. He holds a Bachelor of Arts degree in Management Information Systems from Texas Tech University and a Master of Business Administration degree from The University of Texas at Arlington. Mr. Bray is a CFA charterholder, a member of the CFA Society of Dallas/Fort Worth and a full member of the Chartered Alternative Investment Analyst Association.

## Greg Friedman

Managing Principal, Peachtree Hotel Group (Atlanta)



Greg has successfully led Peachtree in more than \$6.0 billion in hotel acquisitions, investments and development since co-founding the company. Greg has more than 22 years of hospitality experience with an emphasis on deal-structuring and financing. He was formerly Senior Vice President of Business Development for Specialty Finance Group, LLC, a direct lender providing hotel-first mortgage and FF&E financing, originating more than \$2 billion of hotel debt. Previously, Greg was Vice President of Business Development for GMAC Commercial Mortgage's Asset-Backed Lending Division. He originated, closed, and funded more than 300 hospitality FF&E financing transactions with an aggregate capital structure exceeding \$10 billion during his six-year tenure. Greg holds a Bachelor of Arts in Biology from the University of Texas at Austin. He currently is a board member for the American Hotel & Lodging Association.

## Marc Friedberg

Managing Director, Wilshire (Pittsburgh)



Marc is a Managing Director with Wilshire and leads the Alternatives Solutions team. He serves on the private markets Management Research Committee and its Investment Committee, and leads the private markets advisory and customized solutions efforts. He is also responsible for sourcing, performing due diligence, and monitoring investments across private markets sectors within the U.S. Marc joined Wilshire in 1999 and has consulting experience with many types and sizes of investment funds, including corporate and public pension funds, endowments and foundations. Marc also has extensive experience structuring institutional portfolios across all asset classes for a broad range of client types and portfolio objectives. Marc received a BA degree as a dual business/communications major and an MBA with a concentration in finance and economics from the University of Pittsburgh. He also holds the Chartered Financial Analyst designation and is a member of the Pittsburgh Society of Financial Analysts.

## Chirag H. Shah

Senior Portfolio Manager, Private Equity and Special Opportunities, Alaska Permanent Fund Corporation



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





## Spencer Y. Patton

Partner & Managing Director, ICM Asset Management (Atlanta)

Mr. Patton joined ICM in 2011 and is responsible for sourcing investment opportunities and directing company activities in the U.S. Mr. Patton has over 25 years of experience in business development, acquisition, underwriting, management, and fundraising activities for both real estate and private equity transactions. Mr. Patton has held senior positions at Songy Partners (Senior Vice President), Wells Real Estate Funds (Director/Senior Vice President), The Walker companies (Chief Financial Officer and Director of Real Estate), and Wachovia Bank. Mr. Patton was responsible for sourcing, securing, underwriting and closing core, core plus, value-added and development office, hospitality, and mixed-use real estate transactions across the U.S. Additionally, he assisted in fundraising, asset management, dispositions, and capital planning. During his career, he has closed real-estate transactions valued in excess of \$1.9 billion. Mr. Patton has a bachelor of sciences in Business Administration from Washington and Lee University and earned his Masters of Business Administration from Emory University, Goizueta School of Business.

## Brian Smedley

Senior Managing Director/ Chief Economist and Head of Macroeconomic and Investment Research, Guggenheim Partners (New York)

Mr. Smedley is Chief Economist and Head of Macroeconomic and Investment Research at Guggenheim Partners, reporting to the firm's Global Chief Investment Officer. He leads a team of economists and investment strategists who help to formulate the firm's macro and asset allocation views and communicate them to internal and external audiences. Their publications have been ranked among the industry's most-read and most-shared. Previously, Mr. Smedley was Head of U.S. Short Rates Research at Bank of America Merrill Lynch. In this role, he covered Treasuries, interest rate derivatives and money markets, as well as Fed policy and financial regulation. He was ranked 2nd in the Short Duration Category of the Institutional Investor Fixed Income Research Survey. Mr. Smedley joined BAML in 2010 from the Federal Reserve Bank of New York, where he worked as a senior trader/analyst in the Markets Group responsible for FX, commodities, and buy side relationship management. He began his career at the New York Fed in the Emerging Markets and International Affairs Group, where he was a senior economist. Mr. Smedley earned bachelor's degrees in Economics and Finance from Utah State University, where he graduated summa cum laude with honors in Economics. He earned a master's degree in International Development Studies from The George Washington University. As a graduate student, he worked at the U.S. Treasury Department and the White House Council of Economic Advisers.

## Mark Shoberg

Co-CIO & Managing Partner, Capital Creek Partners (Austin)



Mark Shoberg is co-CIO and Managing Partner with Capital Creek Partners where he is responsible for the firm's investment activities across asset classes, including public markets, private equity, venture capital, real estate, and natural resources. Previously, Mark spent nearly 16 years working in senior positions with two prominent university endowments. From 2016 to 2021, Mark was a Managing Director with Stanford Management Company responsible for SMC's global real assets investment portfolio. Prior to joining SMC in 2016, Mark spent over ten years with the University of Texas Investment Management Company. At UTIMCO, Mark served as Managing Director responsible for the firm's real estate, technology, and healthcare investments. Mark's earlier work experience provided him with broad exposure to a number of industries including technology, oil & gas, consulting, and real estate. This experience included working in the consulting division of Accenture (NYSE: ACN) and in the strategic development group of VerticalNet Inc., a public software provider of on-demand supply chain management solutions and business-to-business procurement portals. Mark received an MBA from the Stanford Graduate School of Business and BE in Mechanical Engineering from Vanderbilt University.



# SPEAKERS



## Rozmin Ajanee

Vice President, Jasper Ridge Partners (Menlo Park)

Rozmin Ajanee is a Vice President at Jasper Ridge Partners, a multi-family office based in Menlo Park, CA and Fort Worth, TX. Rozmin is a member of the private equity team and focuses on direct investments and co-investments in both buyout and growth. Prior to joining Jasper Ridge Partners in 2018, Rozmin was on the investment team at Sterling Partners, a Chicago-based middle-market buyout firm that invests in founder-owned businesses in healthcare, business services and education. Rozmin began her career as an investment banking analyst at UBS Investment Bank. Rozmin earned a BS from Northwestern University and an MBA from the University of Pennsylvania's Wharton School of Business.



## Shay Grinfeld

Managing Partner, Greenfield Partners (Hoboken)

Shay Grinfeld, Managing Partner of Greenfield Partners, is an experienced operator, entrepreneur, and investor. He previously acted as Managing Director of NJ-based family office Thylacine Capital. Prior to joining Thylacine, Shay was VP Corporate Development at ad-tech firm WebCollage (acquired by Answers.com), CEO of eGlue (acquired by NICE), and VP Product at Alfy. Shay holds an MBA from Columbia Business School.



## Chris Shonk

Co-Founder, ATX Venture Partners (Austin)

As the oldest of 8 children, Chris started his first business at fourteen and has been financially self-sufficient from that day on. Chris served in the US Army to provide money for college and attain leadership and strategic execution skills from the world's most elite operators. He won the highly prestigious Special Operations Soldier of the Year award in 1996 and worked as an analyst at Merrill Lynch to begin his post-military career. Chris cofounded Virtus Financial Group (now Virtus Real Estate a \$3.5B private equity fund) and served as managing director of the private equity unit. Chris sold his interests in 2006 and cofounded EZ Money Pawn bringing technology and ecommerce to the secured lending and pawn business. There after he cofounded Sneaky Games and was also their lead investor taking that to a successful exit via IPO. He is an active angel investor and mentor to other entrepreneurs and was a founding member of the Central Texas Angel Network and on their board for the first 2 years. Chris is currently a Co-Founder of ATX Venture Partners based in Austin, Texas. ATX the premier early-stage venture fund and co-invest platform servicing the Central US. Known as a numbers-based operator Chris is a sought-after director and advisor in the technology and venture industries, currently serving on the boards of: Cyvatar, Slingshot Aerospace, Pensa Systems, QuotaPath, AtomicFi, Canteen Spirits and GoCo. Chris earned his B.A. at in Business Administration & Economics from Campbell University and his M.B.A. from the University of Texas/Acton School of Business. He was the first alumni to start an endowment for the Acton MBA to afford other deserving entrepreneurs the opportunity to change the world. Chris is on the board of the Boys & Girls Club and helps drive their STEM efforts for underprivileged children in Central Texas. He and his wife Myrna along with their two children reside between Austin, Texas and Crested Butte, CO. When not assisting investors and entrepreneurs he can be found fishing, snowboarding, mountain biking, or taking in some live music.



## Peter Teneriello

Director of Private Equity Sourcing, The KCP Group (Austin)

Peter Teneriello is the Director of Private Equity Sourcing for The KCP Group, a private wealth management subsidiary of Stifel. He has been an institutional investor for most of his career—most recently he was a Senior Portfolio Manager with the Texas Municipal Retirement System, where he was the second-most senior Private Equity professional. He is also a member of the 24th class of the Kauffman Fellows Program, an executive education program focused on developing the next generation of venture capital investors, and holds a B.B.A. in Finance from the University of Notre Dame.



## Matt Shafer

Managing Director, Global Head of Direct Private Equity, Northleaf Capital Partners (New York)

Matt leads the origination, evaluation and monitoring of Northleaf's direct and structured private equity investments. Matt also leads Northleaf's New York office, and actively participates in investment activities across Northleaf's broader private equity program. He serves on the boards for a number of investments within Northleaf's portfolio. Prior to joining Northleaf in 2018, Matt was a Partner and served as Head of the Americas business for Vision Capital, a global investment firm, where he led the sourcing, analysis and execution of private equity and structured capital investments. Previously, Matt was a Managing Director at Nomura International (formerly Lehman Brothers) in London. He began his career at CIBC World Markets. Matt has served on several corporate boards for private equity-backed companies across the consumer, industrial and business services sectors. Matt received a B.A. (History) from Dartmouth College.



## Oliver Wriedt

Founder, HighKey Capital (New York)

Oliver Wriedt is the founder of HighKey Capital. After having spent 16 years in asset management, Mr. Wriedt today serves as President & Head of Capital Markets at 10X Capital Venture Acquisition Corporation II & III, two NASDAQ listed SPACs. Mostly recently, Mr. Wriedt was CEO of Vibrant Capital Partners (2019-2020) and Co-CEO at CIFC Asset Management (2012-2018). Previously, Mr. Wriedt was a Managing Director in Providence Equity Partners' Capital Markets Group and a partner at Sciens Capital Management and GoldenTree Asset Management. Mr. Wriedt started his career in banking at Deutsche Bank and NORD/LB in Singapore, London and New York. Mr. Wriedt is a director of the board of The River Fund, a non-profit organization dedicated to eradicating hunger, homelessness and poverty in New York City. Mr. Wriedt received a B.A. in History and Economics from Duke University in 1993.



## Andre Cuerington

Managing Director, Makena Capital Management (Menlo Park)

Andre Cuerington is a Managing Director in Makena's Client Strategy Group, responsible for advising Makena's institutional clients on the integration of alternative investments into portfolios with diverse goals and structures. He has done similar work over the last 25 years with TCW, PineBridge Investments, Waterfall Asset Management and Western Asset Management. Andre began his career at Callan Associates, where he managed the Quantitative Consulting team, which primarily focused on asset/liability studies. Prior to his investment management career, Andre served for 13 years in the United States Army and held various leadership roles. He earned a B.S. in Operations Research from the United States Military Academy, an M.S. in Applied Mathematics from the Naval Postgraduate School, and an M.S. in Engineering-Economic Systems from Stanford University.



## Manuel M. Ybarra

President & Founder, Pillar Commercial (Dallas)

Manuel "Manny" Ybarra is the founder and CEO of Pillar Commercial, a full-service commercial real estate investment and operating company based in Dallas, Texas. In this role, Manny is responsible for managing the investment performance of a portfolio consisting of office and industrial properties. He leads a team of seasoned professionals in implementing the full spectrum of investment strategies related to acquisitions, finance, property operations, project leasing and dispositions. Prior to launching Pillar Commercial, Manny was executive vice president of Dallas-based TPMC Realty Corporation. In that capacity, he oversaw the leasing and management divisions for the company's real estate holdings in Dallas and Houston. Before entering the real estate industry, Manny served as vice president of economic development for the Greater Dallas Chamber. During his tenure, Manny was an active team leader in the recruitment, retention and expansion of major companies in the Dallas area. Manny is also active in various civic work and industry-related organizations. He has served on past City of Dallas boards and commissions, including the Planning and Zoning Commission and Board of Adjustment. He has also been a member of Dallas' Real Estate Task Force, a committee formed by the Dallas City Council to establish long-term strategies on economic development projects impacting the city of Dallas. He has served on the board of directors for Dallas' Downtown Improvement District and Richardson Chamber Board of Directors. He has also successfully completed several community leadership development programs, including The Real Estate Council's Associate Leadership Council and Leadership Richardson.



## Richard Stockton

Fund Manager, Ashford Inc. (Dallas)

Richard Stockton is the President of the General Partner. He is also the Fund Manager of the Fund and serves on the Fund's Investment Committee. Mr. Stockton is responsible for the overall direction and oversight of the Fund's investment and operating activities with a focus on identifying, underwriting, operating, financing, and harvesting the Fund's Investments. Mr. Stockton is also Senior Managing Director of Ashford. He has served as the Chief Executive Officer of BHR since November 2016 and as President since April 2017. He has been a member of the Board of Directors of BHR since July of 2020. He has also served as the Lead Independent Director of Spirit MTA REIT (NYSE: SMTA) and Trustee of its successor entity, SMTA Liquidating Trust, since 2018. He is a dual citizen of the United States and the United Kingdom. Mr. Stockton received a Master of Business Administration degree in Finance and Real Estate from The Wharton School, University of Pennsylvania and a Bachelor of Science degree from Cornell University, School of Hotel Administration.

## Juan Pablo Martinez

Principal, Measure 8 Venture Partners (New York)



Juan Pablo Martinez is a Principal at Measure 8 and has advised on more than \$2 billion of cannabis transactions. He focuses on opportunities from brands and multi-state operators to genetics, AgTech, biosynthesis and the SaaS/DaaS platforms forming the backbone of the emerging global industry. As a strategic advisor to Curaleaf Holdings, he contributed to the operational and M&A strategy that propelled the company to its present position as the world's largest cannabis company. Over the past five years he has analyzed hundreds of cannabis and ancillary businesses from seed stage to pre-public, developing comprehensive knowledge of success factors in this complex, nascent, high growth sector. Previously Mr. Martinez worked as Senior Analyst at Fredericks Michael & Co., a cross-border M&A boutique, where he focused on European, North American, and LatAm mergers, acquisitions, and divestitures in industries including healthcare, consumer products, aerospace & defense and real estate. He holds a BA from Babson College, and a General Course degree from the London School of Economics.

## Ralph DeBernardo

Partner and Head of Investor Relations, Sapphire Ventures (Austin)



Ralph is responsible for managing all aspects of the firm's investor communications and capital raising activities. Ralph works across all of Sapphire's strategies (Ventures, Sport and Partners) to deliver the firm's capabilities and develop long-term partnerships with its limited partners throughout the world. Ralph has broad experience working with investors both in the U.S. and internationally, including large institutional investors, family offices, HNW individuals, wealth management platforms and consultants. Prior to joining Sapphire, Ralph was the Head of Investor Relations at Peak Rock Capital, a leading middle-market private equity, credit and real estate investment firm based in Austin, TX. At Peak Rock, Ralph worked with some of the largest institutional limited partners in the world. Prior to Peak Rock, Ralph was a member of the Investor Relations Team at Vista Equity Partners, where he was responsible for raising capital and managing investor relationships across all investor types and geographies and product management across Vista's credit strategies. Prior to that, Ralph was with Kohlberg Kravis Roberts & Co. (KKR) in the Client & Partner Group working across the firm's alternative product suite and helping to manage some of the firm's largest strategic relationships. Ralph began his career at J.P. Morgan Asset Management in New York City. Ralph holds a bachelor's degree from Columbia University where he was also a member of the varsity football team. He has called Austin, TX home since 2017, along with his wife, Kaitlyn, and two young kiddos.

## Dimitri Cohen

Principal & Portfolio Manager, Raven Capital Management (Los Angeles/New York)



Dimitri Cohen is a Principal, Portfolio Manager and leads the Firm's Credit Strategies. Mr. Cohen has over 15 years of experience sourcing, analyzing, and managing investments across a variety of industries and asset classes. Mr. Cohen's responsibilities include oversight of investment origination, underwriting, execution and portfolio management. Prior to joining Raven, he was a Senior Research Analyst at DDJ Capital Management, where he was responsible for investments in the gaming, lodging and leisure, food and consumer products industries across the loan, high yield, mezzanine, private placement and distressed strategies. Prior to joining DDJ Capital Management, he was a Senior Research Analyst at Seawall Capital Management, a long-short credit-focused hedge fund. Mr. Cohen began his career in the investment banking division of Wells Fargo Securities, where he advised clients on public and private offerings and mergers and acquisitions. Mr. Cohen received his BS from the California Polytechnic State University, where he currently serves on the Finance Advisory Board for the Orfalea College of Business.





## Michael T. McKeown

Chief Investment Officer, Marcum Wealth (Cleveland)

Michael McKeown is responsible for leading the firm's investment research on capital markets. He created the firm's quantitative and qualitative due diligence process for analyzing investment managers across equities, fixed income, and alternative strategies. In addition, he developed the Marcum Wealth Asset Allocation Frameworks based which guides the management of client portfolios. He authors market commentaries and quarterly investment strategy newsletters. Michael holds the Chartered Financial Analyst designation. He is also a Certified Public Accountant.



## Michael S. Beaudoin

Director of Private Equities, Mark IV Capital (Newport Beach)

Michael Beaudoin currently invests in private equities, including providing venture capital, to rapidly growing early-stage companies for Mark IV Capital; located in Newport Beach, CA. Prior to joining Mark IV Capital, Michael took part in AT&T's Leadership Development Program where he led several organizations, supported officers of the company via strategy work, managed the ConnecED donation, and created AT&T's Aspire Accelerator. Michael began his career in investment and commercial banking at Bank One and Merrill Lynch; then went on to serve as a Vice President at both JPMorgan Chase and Deutsche Bank where he led teams focused on wealth management. Michael graduated with a BS from Ball State University in 2001 and an MBA from Pepperdine University's Graziadio School of Business in 2011. His MBA degree included certificates in "Social, Ethical, & Environmental Responsibility" and "Dispute Resolution" from the Pepperdine University School of Law.



## Maneesh Gandhi

Partner, Evanston Capital (Illinois)

Maneesh Gandhi is a Partner, Investments and a member of the Investment, Valuation and Risk Management Committees. He joined the firm in 2008 and is primarily responsible for sourcing, evaluation, monitoring and due diligence of prospective and existing investments in private equity and venture capital. Prior to joining the firm, Maneesh worked as an investment associate in private equity for five years at Svoboda, Collins and ICV Capital, both late-stage buyout firms. At these firms, he was responsible for evaluating private, middle market companies and their senior management teams for potential investments and monitoring portfolio companies. Maneesh began his career at Merrill Lynch in the Mergers and Acquisitions group within Investment Banking. He earned his BSBA from Washington University in St Louis and an MBA from Harvard Business School.



## Akila Grewal

Co-Head of Product and the Head of Credit/FIG Product, Apollo Global Management (New York)

Head of Product and the Head of Credit/FIG Product for Apollo's global platform. Ms. Grewal currently serves on several firm committees including Apollo's Credit Management Committee and the Credit Allocations Sub-Committee. Prior to joining Apollo, Ms. Grewal was on the Proprietary Trading and Risk Management team at Mariner Investment Group. Prior to that, Ms. Grewal was in the Business Development group at MKP Capital. Ms. Grewal started her career at Credit Suisse on the Portfolio Management and Product Delivery team within the firm's fund of hedge funds. Ms. Grewal graduated from New York University's Stern School of Business with a B.S. in Finance and is a CFA charterholder.



## William Prather

Founding Partner, Chief Investment Officer, Cypress Creek Partners (Austin)

William Prather leads the investment team at Cypress Creek Partners which focuses on empowering the next generation of investment teams by establishing long-term partnerships to deliver enduring value to its clients. Cypress Creek manages over \$500 million in assets and invests across private equity and real asset strategies. Prior to co-founding Cypress Creek Partners in 2020, William was the Head of Natural Resources and Infrastructure Investments at the University of Texas/Texas A&M Investment Management Company (UTIMCO), which manages \$60+ billion in endowment and operating funds for The University of Texas and Texas A&M Systems. At UTIMCO, William managed a \$5+ billion private-focused portfolio covering energy, metals and mining, agriculture and infrastructure assets globally. Prior to joining UTIMCO, William worked at BlackRock in New York City where he was a portfolio manager/analyst investing across the capital structure in both public and private markets across all sectors. Before BlackRock, William was an Investment Banking Analyst at Lehman Brothers in New York City. William is a CPA and a CFA charterholder and received an MPA and BBA from The University of Texas at Austin, McCombs School of Business.



## Jamil McNeal

Director of Investments, True North Advisors (Dallas)

Jamil is the Director of Investments – Credit and Private Markets at True North Advisors, where he is helping to build, execute, and manage the firm's Western Alternative Strategies (WAS) investment offerings which is an inhouse series of private and alternative focused vehicles. He has worked in the investment industry for over 17 years and over that time has covered Private Debt, Private Equity, Private Real Assets, and Alternative Credit among other roles. Prior to his time at True North, Jamil was a private markets allocator for a Dallas based corporation where he developed a passion for institutional quality private investing. He has brought this passion to True North where he focuses on providing expanded access to quality private investments and alternatives in the wealth management and RIA space.



## Adriana Ballard

Director of Asset Owner Solutions, Nasdaq (Austin)

Adriana Ballard is the Director of Asset Owner Solutions at Nasdaq. Previously, she worked as a Private Equity Portfolio Manager at Employees Retirement System of Texas (ERS), a public pension fund with \$34 billion in assets under management and was with ERS for 14 years. In addition, she worked at Goldman Sachs as a Senior Client Analyst for Private Wealth Management, serving Latin American clients on a variety of investment strategies including Alternative Assets. Ms. Ballard began her career at Citibank Worldwide Security Services implementing custody and institutional services to international investors. She has a Bachelor of Science from Universidad de Los Andes (Bogota), a PgDip for Universidad del Rosario (Bogota) in International Business and an MBA from IE Business School.





# PRE-EVENT NETWORKING COCKTAIL

Wednesday, October 19<sup>th</sup>

5:00pm – 8:30pm CDT

Location: Sapphire Ventures

801 W 5th Street, Suite 100  
Austin, TX 78703

Sponsored by:

**SAPPHIRE**  **Nasdaq**  
VENTURES

# AGENDA OUTLINE

7:30 AM CDT Registration & Breakfast Networking

8:30 AM CDT Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

8:30 AM CDT Macroeconomic Trends and the Impacts on Global Investment Opportunities

Guggenheim Partners Chief Economist and head of Macroeconomic and Investment Research offers insights on macroeconomic trends and the potential impacts on global investment opportunities. Mr. Smedley analyzes a wide range of economic data and market behavior to synthesize the implications for investors and the potential direction of policy and markets.

Presenter:

**Brian Smedley**, Senior Managing Director/ Chief Economist and Head of Macroeconomic and Investment Research, **Guggenheim Partners**

9:00 AM CDT Perspectives in Private Markets

Leading Institutional Investors discuss their current investment theses across the private markets. How have their strategies changed given geopolitical conflicts, inflation and rising interest rates?

Moderator:

**Adriana Ballard**, Director of Asset Owner Solutions, **Nasdaq**

Panelists:

**William Prather**, Founding Partner, Chief Investment Officer, **Cypress Creek Partners**

**Dory A. Wiley**, President & CEO, **Commerce Street Holdings**

**Jamil McNeal**, Director of Investments, **True North Advisors**



# AGENDA OUTLINE

9:40 AM CDT

## Texas Strategic Growth Fund, a Private Placement Offering

The COVID-19 pandemic sent shock waves through societies and economies around the world. What megatrends have emerged? We've seen an enduring desire for travel and new experiences and the need to share those experiences with friends and family. We've seen a premium placed on having more space, ease of living and affordability resulting in mass migration to several sun belt states, including Texas. Please join us to take a deeper dive into some of the post-pandemic megatrends and how investors may capitalize on them.

Presenter:

Richard Stockton, Fund Manager, Ashford Inc.

10:00 AM CDT

## Morning Networking Break

Sponsored by:



10:50 AM CDT

## Digital Asset Funds and Strategies

Moderator:

Ryan DeMattia, Founder & Managing Director, Coindex Capital Management

Speaker:

Alan Weinfeld, Partner, Invesco Private Capital

Oliver Wriedt, Founder, HighKey Capital

Maneesh Gandhi, Partner, Evanston Capital

# AGENDA OUTLINE

11:30 AM CDT

## Investor Perspectives in VC: Early Stage & Growth

Leading Venture Capital Investors discuss current trends, valuations, fund and co-investment opportunities across various sectors including Tech, Healthcare, Cyber Security, etc. The panel discusses global trends and how they add value to their portfolio companies.

Moderator:

Ralph DeBernardo, Partner and Head of Investor Relations, **Sapphire Ventures**

Panelists:

Steven Kim, Partner, Investment Strategy and Risk Management, **Verdis Investment Management**

Shay Grinfeld, Managing Partner, **Greenfield Partners**

Chris Shonk, Co-Founder, **ATX Venture Partners**

Juan Pablo Martinez, Principal, **Measure 8 Venture Partners**

12:30 PM CDT

## Networking Luncheon

Sponsored by:

**APOLLO**

1:30 PM CDT

## Private Credit Outlook

Private credit managers discuss how they have positioned their strategies to withstand high inflation and a potential recession.

Moderator:

Jamil McNeal, Director of Investments, **True North Advisors**

Panelists:

John Ide, Managing Director, **Star Mountain Capital**

Greg Friedman, Managing Principal & Chief Executive Officer, **Peachtree Hotel Group**

Dimitri Cohen, Principal & Portfolio Manager, **Raven Capital Management**

Akila Grewal, Co-Head of Product and the Head of Credit/FIG Product, **Apollo Global Management**

# AGENDA OUTLINE

2:30 PM CDT

## Family Office Perspectives

Family offices discuss their current appetite for fund, direct & co-investment across various sectors in the private markets. How do they view current valuations across sectors. How do they add value in the investment process and how do they go about manager and deal selection?

Moderator:

Michael S. Beaudoin, Director of Private Equities, **Mark IV Capital**

Panelists:

Rozmin Ajanee, Vice President, **Jasper Ridge Partners**

Mark Shoberg, Co-CIO & Managing Partner, **Capital Creek Partners**

Peter Teneriello, Director of Private Equity Sourcing, **The KCP Group**

3:15 PM CDT

## Texas Real Estate Outlook

With the acceleration of population coming to Austin and other Texan cities, comes continued real estate demand and opportunity across Residential, Industrial, Office and Hospitality related assets. On this session, our expert panelists discuss key data points and where they are currently seeing real estate opportunities with the best risk-adjusted returns in Texas.

Moderator:

Michael T. McKeown, Chief Investment Officer, **Marcum Wealth**

Panelists:

Yola Ozturk, Principal & General Partner, **March Capital Fund**

Spencer Y. Patton, Partner & Managing Director, **ICM Asset Management**

Manuel M. Ybarra, President & Founder, **Pillar Commercial**

# AGENDA OUTLINE

4:00 PM CDT

## Buyout & Secondaries

On this session leading institutional investors and fund managers talk about their buyout and secondaries strategies in the current environment. What do investors need to see to get comfortable with a deal right now? At the portfolio level, how has the market environment impacted allocation? How are investors thinking about various secondary market options in their portfolio? How do conservative or aggressive valuations impact decisions that investors are making?

Moderator:

Mike Krems, Private Equity Portfolio Strategies, **Aksia**

Panelists:

Scott Ramsower, Head of Private Equity Fund Investments, **Teacher Retirement System of Texas**

Michael Sexton, Private Equity Services, **Partners Group**

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

Matt Shafer, Managing Director, Global Head of Direct Private Equity, **Northleaf Capital Partners**

5:00 PM CDT

## OCIO Perspectives

Outsourced Chief Investment Officers discuss their client appetite for fund, direct and co-investment. How are they currently addressing the challenges in the market and how has their investment thesis changed over the last 12 months.

Moderator:

Sharmila Kassam, Head of Nasdaq Asset Owner Solutions, **Nasdaq**

Panelists:

Kevin Vandolder, Investment Consultant, **AndCo Consulting**

Timothy R. Bray, Director of Alternative Investments, **GuideStone Capital Management**

Andre Cuerington, Managing Director, **Makena Capital Management**

Marc Friedberg, Managing Director, **Wilshire**

6:00 PM CDT

## End of Conference

THE PRIVATE MARKETS TEXAS MEETING







PARTICIPATION OPTIONS





# PARTICIPATION OPTIONS

## COMPLEMENTARY

We only invite Limited Partners at no cost. We qualify LPs as Public Pensions, Corporate Pensions, Pension Consultants, Foundations, Sovereign Wealth Funds, Endowments, Insurance Investors, Single Family Offices, Multi Family Offices, RIAs & UNWI Investors.

### Conditions:

- Carmo carefully vets all participants to make sure they fit the LP criteria
- Carmo has the right to refuse any participant from joining should they not meet the criteria
- If you raise external capital, you cannot join on a complimentary basis.
- If you wear two hats, you cannot join on a complimentary basis. (Example: You represent a family, but you also help a fund raise capital) Nope!
- If you are caught sneaking in and pitching a fund or deal, you will be banned from the Carmo platform. You must pay to play.

## STANDARD PASS

- **Pass**
  - 1 pass to full conference, event cocktail hours and networking sessions.
  - *Attendee list Not included*
- **Networking App Access**
  - 1 pass to event networking app for 1 week

**Early Bird: \$1,500 USD Ends July 29th**

**Pre-Registration: \$2,000 USD Ends September 30th**

**Standard: \$2,500 USD**

## ATTENDEE LIST SPONSORSHIP

- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
  - Pre-event email intros/ Carmo meeting facilitation *NOT* included.
- **Networking Break or Stand (Optional)**
  - Branding and announcement to all attendees during networking break
  - Ability to upgrade food and beverages for networking
  - Sponsor may choose to have 10' x10' space in networking area to distribute marketing material and present information regarding company.
- **Passes**
  - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 3 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.

**\$10,000 USD**

## CAP-INTRO SPONSORSHIP

- **Meeting Facilitation**
  - Select targeted LP/GP attendees from Event
  - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
  - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
  - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
  - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 3 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.
  - Entitled to a Full-Page Advertisement in conference brochure

**\$12,500 USD**

# PARTICIPATION OPTIONS

## SPEAKING SPONSORSHIP

- **Speaking Position**
  - Client may choose to speak, moderate or present on panel of choice at event of choice
- **Meeting Facilitation**
  - Select targeted LP/GP attendees from Event
  - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
  - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
  - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
  - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 3 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.
  - Entitled to a Full-Page Advertisement in conference brochure

**\$15,000 USD**

## PRESENTATION SPONSORSHIP

- **Presentation**
  - Stand-Alone 20 Minute presentation at time of choice during the event
- **Meeting Facilitation**
  - Select targeted LP/GP attendees from Event
  - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
  - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
  - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
  - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 3 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.
  - Entitled to a Full-Page Advertisement in conference brochure

**\$30,000 USD**

## EXCLUSIVE TITLE SPONSORSHIP

- **Priority Brand Placement & Material Distribution**
  - Sponsor's Corporate logo to be placed above and in a larger format on the conference brochure, agenda, website, banners and branded event advertisements
  - Any research or marketing materials will be made available and/or distributed to all conference attendees.
  - Sponsor to include a full-page advertisement to be placed on back cover of conference brochure.
  - Sponsor logo and link to sponsor site to be included on a bi-weekly newsletter which will update all confirmed and prospective attendees of event progress.
  - Sponsor to have all attendee lanyards with company logo.
- **Exclusivity**
  - First access to conference attendee list 3 weeks prior to the event.
  - Carmo will provide one on one introductions via email to all prospective clients of choice (funds/investors).
  - On-site direction and introduction facilitation to prospective clients
  - Dedicated private sponsor room for 1 on 1 meetings

- **Exclusive Sponsor Cocktail/Dinner**
  - Carmo to help facilitate private cocktail party/dinner with selected investors night before the event
- **Speaking/ Moderating Positions**
  - 2 Moderating/speaking or presentation positions on panel of choice. (first come first serve basis)
- **Company & Speaker Profiling**
  - Company description to be published online and in print (150 words max)
  - Speaker bio to be published online and in print (150 words max)
- **Conference passes**
  - Up to 10 attendee passes for sponsor employee executives

**\$70,000 USD**





Carmo Companies is a New York based institutional capital introduction consulting firm and professional conference organizer. We work with the most reputable real estate and private equity related operating platforms to establish capital raising relationships with leading private equity funds, institutional investors and private wealth groups located in the Americas and emerging market countries.

**Roy Carmo Salsinha**  
President & CEO  
T: +1-646-688-3375  
roy.salsinha@carmocapital.com

**Erick Cruz**  
Senior Vice President, Private Equity  
T: +1-646-688-5327  
erick.cruz@carmocapital.com

**Catherine Correia**  
Vice President, Real Estate & Marketing  
T: +1-646-688-3207  
catherine.correia@carmocapital.com

**Renato Ferreira**  
Vice President, Private Equity  
T: +1-646-688-3375  
Renato.ferreira@carmocapital.com

**Flavia Correia**  
Vice President, Real Estate  
T: +1-646-688-3207  
flavia.correia@carmocapital.com

**Nicolás Rodriguez**  
Vice President, Private Equity  
T: +1-646-688-3205  
nicolas@carmocapital.com





THANK YOU

49 HUNTINGTON BAY ROAD  
HUNTINGTON, NY 11743  
[www.carmocompanies.com](http://www.carmocompanies.com)

