



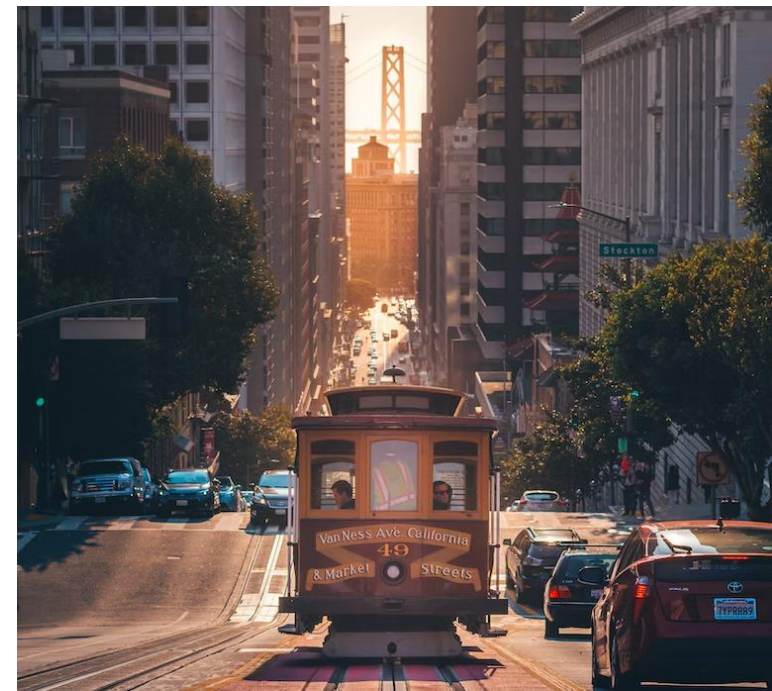
# PRIVATE MARKETS CALIFORNIA MEETING

The Ritz-Carlton San Francisco, CA  
September 5th & 6th, 2023



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# PRIVATE MARKETS CALIFORNIA MEETING

RITZ-CARLTON SAN FRANCISCO, CA  
SEPTEMBER 5TH & 6TH, 2023

Dear Colleague,

It is with great pleasure that I invite you to join us at the Private Markets California Meeting. This exclusive institutional gathering brings together the most important and active institutional allocators and family offices in the California that are investing in Global Private Equity, Venture Capital, Secondaries, Private Credit and Real Assets. Over 150 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.

We look forward to hosting you in San Francisco!

Best,

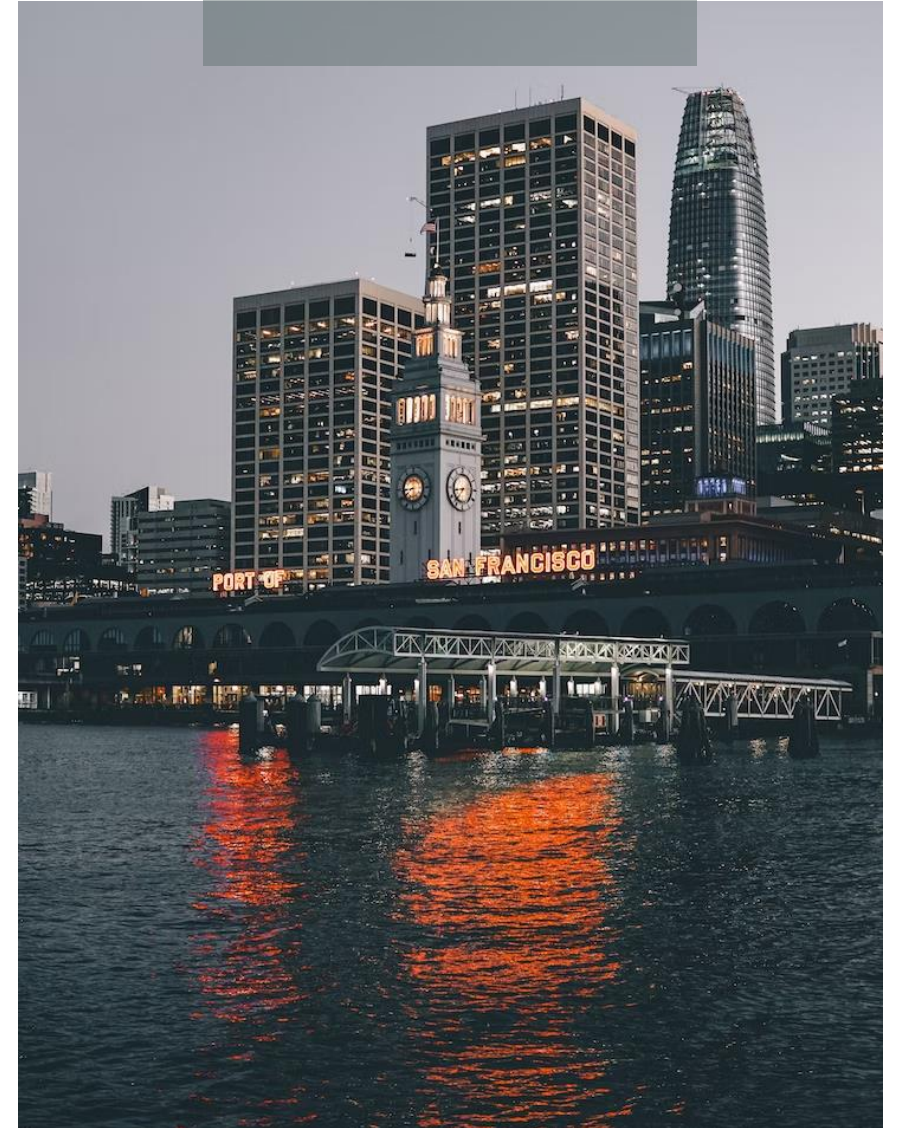
Roy Carmo Salsinha  
**President, CEO**  
Carmo Companies

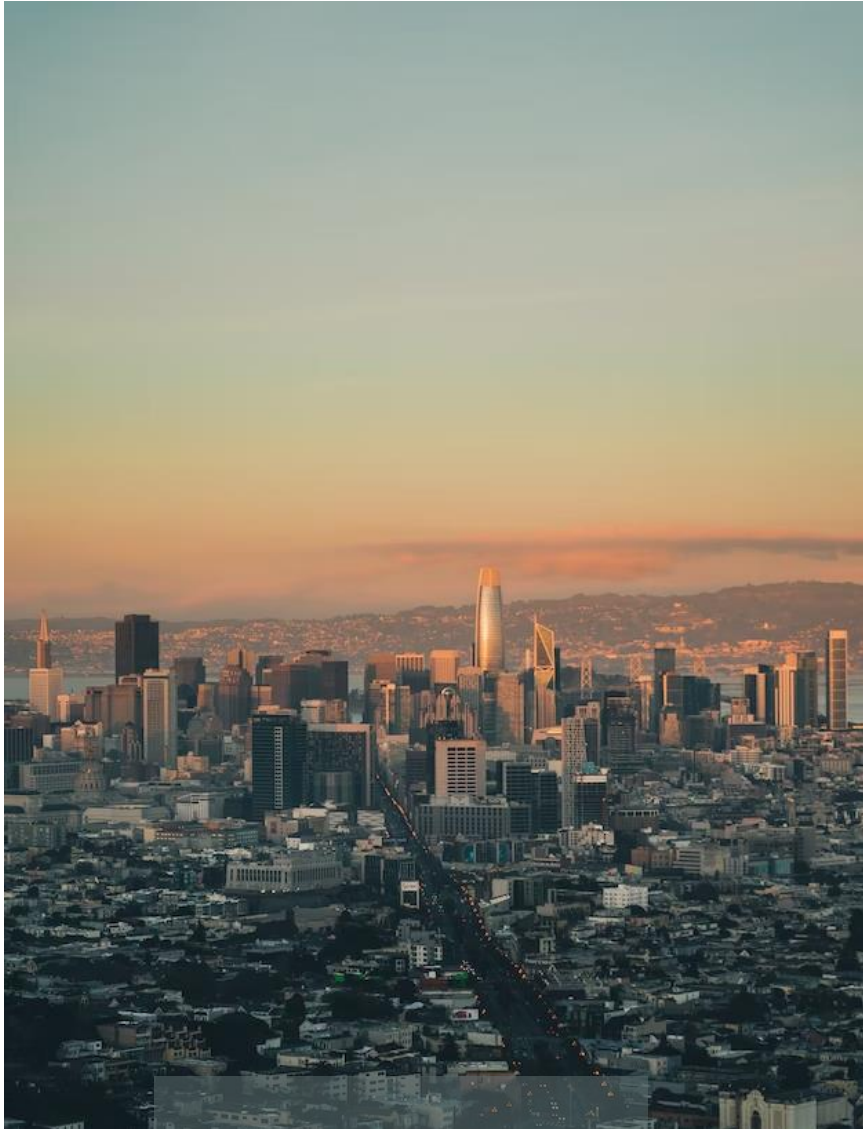


# BY THE NUMBERS

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- \$5+ Trillion AUM in attendance
- 150+ Total participants
- 75+ Institutional & Private Wealth Investors
- 75+ Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking/Speed Dating
- 1 Full day Conference
- 1 Pre-Event Networking Cocktail





# 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



# PREVIOUS SERIES SPONSORS



# INSTITUTIONAL PARTNERS





# 2023 SPONSORS



American Infrastructure Partners (“AIP”) is committed to building unique and asset-specific infrastructure platforms dedicated to partnering with communities to solve their most critical infrastructure needs. Through AIP’s current platforms we are providing communities with immediate capital and operational solutions to meet their infrastructure needs in school buildings, broadband and communications connectivity, logistics services and transportation (bridges).



Bow Capital is a multi-stage investment platform founded by Vivek Ranadive, in partnership with UC investments, that looks to accelerate the path from science to society. Key roadmap areas include non-linearity in healthcare, transportation and logistics, the future of work / AI and ML in the enterprise, and sports, media, and entertainment.



Brentwood is a lower middle market private equity firm specializing in the Consumer and Business Services sectors. Founded in 1984 and headquartered in Los Angeles, the firm is led by a cohesive partner team with 120+ years of cumulative investment experience and an average of 20+ years of tenure at Brentwood. The firm focuses on investments in growing end-markets across Consumer and Business Services, including franchising & food; health, wellness & beauty; education & training; and consumer essentials. The Firm’s proprietary, time-tested value creation playbook is anchored in extensive data analytics capabilities that underpin diligence and drive post-closing growth strategies. Brentwood’s flexible investment structuring with both control and significant minority positions enables Brentwood to win and allows for strong risk-adjusted returns. The Firm’s deep relationships lead to proprietary deal sourcing and process angles, partnering with business founders and strong management teams to deliver compelling operational results.



Carmo Hunter offers a consultative, high-touch approach and aim to foster relationships with our clients to better understand hiring needs, plans for growth and long-term vision. We can help you selectively source top talent across the country by creating a strategic recruiting solution that is specific to each company and firm. Carmo Hunter is a joint venture between San Francisco based Hunter SF and New York based Carmo Companies. We execute junior level to senior management positions.





# 2023 SPONSORS



Freeflow is an early-stage venture capital firm focused on advancing science to benefit human and planetary health. Founded in 2019, our thesis is that science will unlock the transformations we need to survive and thrive. To date, we have invested in nearly 30 companies from Caltech where groundbreaking scientific research and deep tech innovation abound. Visit <https://www.freeflow.io/> to learn more.



Forge (NYSE: FRGE) is a leading provider of marketplace infrastructure, data services and technology solutions for private market participants. By combining world-class trading technology and operating expertise, Forge Markets enables private company shareholders to trade private company shares with accredited investors. Forge Company Solutions, Forge Data and Forge Trust along with Forge Markets help provide additional transparency, access and solutions that companies as well as institutional and accredited investors need to confidently navigate and efficiently transact in the private markets. Securities-related services are offered through Forge Securities LLC ("Forge Securities"), a wholly-owned subsidiary of Forge. Forge Securities is a registered Broker Dealer and Member of FINRA/SIPC, an alternative trading system.



KPMG is the U.S. firm of the KPMG global organization of independent professional services firms providing Audit, Tax, and Advisory services. KPMG firms operate in 143 countries and territories with more than 265,000 partners and employees working in member firms around the world. Each KPMG firm is a legally distinct and separate entity and describes itself as such. At KPMG, we come to work every day because we are passionate about solving the business challenges that keep our clients up at night. Our people work alongside companies of various shapes and sizes, in all 50 states, to pinpoint and deliver practical, customized business services that drive real results.



March Capital Management is a private equity real estate fund and a development company that invests in underutilized residential real estate assets and maximizes their value. March Capital Management focuses primarily on the West Coast urban markets. Investments range from small residential buildings to large, ground-up, infill projects. The management team is laser focused on product fit for a particular location with a keen eye on design. To accomplish that goal, March Capital Management has a hands-on approach across all aspects of the development cycle, from due diligence, acquisition, architectural design, entitlement, permitting, contract bidding, construction, and property management all the way to marketing and disposition of the end product. March Capital Management has an enviable track record across three funds.



# 2023 SPONSORS



Percent has created the modern credit marketplace, empowering investors, borrowers, and underwriters with innovative technology to increase the speed and velocity of transactions at a fraction of the cost. The company's core infrastructure delivers public market efficiencies to the analog private credit market by powering the sourcing, structuring, syndication, surveillance and servicing of private credit transactions from beginning to end. Founded in 2018, Percent's platform is becoming the market standard for asset-backed and corporate lending, powering over \$1 billion in transaction volume in a multi-trillion-dollar private credit industry. For additional information, please visit [www.percent.com](http://www.percent.com).



Revere provides venture capital data and portfolio management solutions to asset allocators. The VC industry is often opaque, making it difficult for allocators to understand their investments. Revere's mission is to help allocators save time and make informed investment decisions by giving them access to data and actionable insights, bringing transparency and accessibility to the VC asset class. Revere ONE is a complete software stack that tracks assets, analyzes risks, and forecasts cash flows—all delivered through customizable reports and dynamic dashboards. Revere Analytics includes the world's first fund rating system and the most comprehensive benchmarking tool for investing in venture capital funds. Built for allocators by allocators, Revere's solutions are here to support you on your venture capital journey.



Rithm Capital is an asset manager focused on the real estate and financial services industries. The company focuses on investing in the financial services and real estate sectors and has grown its balance sheet to ~\$34 billion in gross assets and ~\$7 billion in equity. Since inception in 2013, Rithm Capital has delivered approximately \$4.7 billion in dividends to shareholders. Rithm's success is driven by its strategic approach, focused on a diverse, complementary, and adaptable portfolio of investments that includes its operating companies, investment portfolio, and recently launched private capital business. Rithm's highly differentiated model benefits from decades of investment expertise, strong performance history, proprietary sourcing & origination opportunities, significant market insights, and leading asset servicing capabilities. Rithm seeks to provide attractive risk-adjusted returns across interest rate environments. The company is headquartered in New York City and has an office in London.



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 ~\$3.5 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 public / corporate pension plans. Star Mountain is 100% employee-owned and 100% of employees share in the investment profits across 100+ 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 ~200 direct investments and 35+ secondary / fund investments since its inception.



# 2023 SPONSORS



StepStone Group Inc. (Nasdaq: STEP) is a global private markets investment firm focused on providing customized investment solutions and advisory, data and administrative services to its clients. StepStone's clients include some of the world's largest public and private defined benefit and defined contribution pension funds, sovereign wealth funds and insurance companies, as well as prominent endowments, foundations, family offices and private wealth clients, which include high-net-worth and mass affluent individuals. StepStone partners with its clients to develop and build private market portfolios designed to meet their specific objectives across the private equity, infrastructure, private debt and real estate asset classes.



Top Tier is a dedicated venture capital asset manager with a 23-year history based in Silicon Valley making primary commitments, secondary investments, co-investments, direct investments across almost US\$8 billion in AUM. Having partnered and supported some of the world's most access-constrained, best-performing venture capital managers for over two decades, Top Tier's proprietary database, relationships, information advantage, experience, insights, unique value add provide compelling venture exposure for its investors. The performance of Top Tier's offerings is top quartile, often top decile, in all categories beating several benchmarks with Top Tier VIII being ranked the number one performing VC fund for its vintage and size according to Preqin.



Founded in 2011, Upwelling Capital Group LLC is an investment advisor focused on providing advisory and capital solutions to premier institutional investors and private capital managers. The Principals have cumulatively overseen over \$50 billion in global private equity commitments and have successfully managed over \$5 billion in legacy, tail-end commitments, transfers and workouts for leading institutional investors.



Working with clients across the alternative investment community, including over 2,500 funds, Weaver knows how to deliver services with efficient processes that relieve your operational stress. We have decades of experience in accounting, tax and regulatory reporting, valuation of complex financial instruments, and development of strong internal controls. When it comes to your audit, tax and advisory needs, Weaver helps you fulfill your due diligence and compliance obligations while managing risk and cost with comfortable transparency.



## Vivek Ranadive

Chairman, CEO & Governor, Sacramento Kings, Founding Partner, Bow Capital (Palo Alto)

Vivek Ranadivé is the owner and chairman of the Sacramento Kings. He is an entrepreneur, technology visionary, New York Times best-selling author and philanthropist recognized for his innovative thinking. As a technology entrepreneur, he pioneered the use of real-time event processing software and created TIBCO, a multibillion-dollar software company. In addition to digitizing Wall Street, his software became the central nervous system for most of the world's largest companies and government agencies. He is known as "The Man with the Midas Touch" and "Mr. Real Time" which defines his belief that by getting the right information to the right place at the right time, you can make the world a better place. Ranadivé is the founder and managing general partner of venture capital firm Bow Capital, a partnership with the University of California with a mission to fund technology companies that advance science to society.



## Nelson Chu

Founder & CEO, Percent (New York)

Nelson Chu is an experienced serial entrepreneur and the Founder and CEO of Percent, the modern credit marketplace. After witnessing the inefficiencies in the private credit markets, Nelson was inspired to transform this industry for the better and founded Percent in 2018. He and his team have built an end-to-end credit platform unlike any other, empowering borrowers, underwriters, and investors to transact with confidence through governance, asset transparency, and market standardization. Nelson has been recognized by Private Debt Investor as a Rising Star in their annual list of the top 40 individuals shaping the future of private credit. Prior to Percent, Nelson founded a strategy consulting firm that helped companies build products and raise capital for growth, creating over \$1B in equity value. He also brings his background from global financial institutions, including Bank of America and BlackRock, to Percent. Outside of Percent, Nelson pursues his personal interests in angel investing, art, and philanthropy. His angel investment portfolio includes companies such as BlockFi, Care/Of (Acq: Bayer AG), Clover Health (NAS: CLOV), dv01 (Acq: Fitch), Eden Health, Plentina, Tala, and Uala. He has been actively involved in several nonprofits, including serving as a Board Member of The Bubble Foundation, Host Committee Member for Alicia Keys' Keep a Child Alive, and Yamba Malawi. Nelson graduated from Rutgers University with a Bachelor of Arts degree in Economics and Political Science.



## David York

Managing Director & Founder, Top Tier Capital Partners (San Francisco)

David is a Managing Director and member of the Investment and Management Committees at Top Tier Capital Partners (Top Tier). He also leads the Corporate Development team and is responsible for the management, development, and growth of Top Tier's offerings. His thirty plus years of industry knowledge and networks uniquely equip him to be a liaison and international ambassador not only for Top Tier's brand, but also the broader venture community. In 2000, David joined Phil Paul to lead the fund of funds team at Paul Capital, which spun out in 2011 to form Top Tier. David has been active in the global venture capital community since the early 1990s. As a founder of Top Tier, he has led the development of the Firm for over twenty years and has been involved in every aspect of it. His involvement in the industry has led him to participate in numerous industry events and conferences, and also the NVCA, where he is an active board member. David led the fund of funds business at Paul Capital Partners, before spinning it out and founding Top Tier. Prior to Paul Capital, David spent seventeen years on Wall Street running various trading desks. In 1999, he was Managing Director at Chase H&Q, where he ran Equity Capital Markets liquidity, and from 1994 to 1999 he ran Venture Services for Hambrecht & Quist, a San Francisco-based, technology-focused investment bank acquired by Chase Bank. Early in his career, David spent time at Drexel Burnham and Paine Webber as well as a period working for his family's business, Ewing Irrigation Products.



## Matt Diestel

Partner & Head of US, QIC Private Capital (San Francisco)

Matt Diestel is a Principal and Head of US for QIC Private Capital. He is responsible for managing all North American venture capital and private equity investment activities across funds, co-investments, and secondaries with a particular focus on technology and healthcare. Previously, he was an Investment Officer within the private equity group at CalSTRS where he focused on middle-market buyout, venture capital, and co-investments. Before joining CalSTRS, Matt worked at UBS and Morgan Stanley. Matt earned a B.A. in Business Economics from the University of California, Santa Barbara and a MBA from the Graduate School of Management at the University of California, Davis.



## Justin Kunz

Director, U.S. Family Office, BlackRock (San Francisco)

Justin Kunz, Director, is a Relationship Manager for BlackRock's FOHFE team, focusing on key Family Office relationships and growing BlackRock's west coast presence. Prior to joining BlackRock in 2021, Justin spent 14 years at Fidelity, where he spent the majority of the time working with the largest family offices in the country and developing those relationships through investment solutions- in both public and private markets. While Justin is well-read in the financial markets, having grown up in Silicon Valley he is especially passionate about the tech and fintech sectors. He is a graduate of the University of Arizona Eller School of Business and enjoys rugby and playing the guitar.



## William DeMar

Senior Director, Choreo (Reno)

William (Bill) DeMar is a Senior Director at Choreo Advisors, a registered investment adviser serving affluent families and business owners. He sits on the investment committee and is assisting in building the alternative asset platform at the firm, including access to private real estate, 1031's, QOZ's, REITS, private equity, and private debt."



## Joncarlo Mark

Founder, Upwelling Capital Group (Sacramento)

Joncarlo R. Mark is founder of Upwelling Capital Group LLC, an investment adviser that provides capital solutions to premier institutional investors. Prior to forming Upwelling in 2011, Joncarlo was a Senior Portfolio Manager in the Alternative Investment Management (AIM) Program at the California Public Employees Retirement System (CalPERS). CalPERS is the largest US public pension fund, with over \$400 billion in overall assets. From 2007 to 2010, Joncarlo served as Chairman of the Board for the Institutional Limited Partners Association (ILPA), whose 250-member institutions at the time managed more than \$1 trillion of private equity capital. He continues to serve as a faculty member for the ILPA Institute, which provides executive education to its membership. From 2014 to 2020, Joncarlo was a trustee for the University of California Davis Foundation and held the role of Finance and Investment Committee chair from 2017 to 2019. From 2012 to 2018, he was also on the Board of Directors for AltExchange Alliance, an industry group dedicated to implementing standardization of financial reporting in private equity. Prior to joining CalPERS in 1999, Joncarlo spent six years with Premier Farnell PLC, a global industrial products manufacturing and distribution company. Joncarlo earned an MBA from the Graduate School of Management at the University of California Davis and received a BA from the University of California San Diego



## Justine Liu

Vice President, Private Equity, Makena Capital Management (San Francisco)

Justine Liu is a Vice President on the Private Equity team at Makena Capital Management, responsible for supporting portfolio management, manager selection, and direct investments for the Private Equity asset class. Before joining Makena, Justine was an investor at Apollo Global Management, where she focused on the evaluation and execution of private equity investments. Prior to Apollo, Justine was an Associate at Goldman Sachs in the Principal Investment Area within the Merchant Banking Division, where she analyzed private credit investment opportunities across the capital structure. Previously, Justine was an Investment Banking Analyst in Goldman's Leveraged Finance group. Justine graduated cum laude from Harvard University with a B.A. in Statistics and a Secondary in Economics.



## Ethan Doyle

Managing Director, AITi Tiedemann Global (San Francisco)

Ethan is a senior member of AITi's Investment Group. Ethan is the co-head of the private equity program and leads the firm's co-investment and direct investment activities. Ethan has two decades of experience in the financial services industry mainly as an investment professional, but also including experience in Mergers and Acquisitions advisory. Prior to joining AITi, Ethan worked as a portfolio manager for a San Francisco-based family office. Prior to that, Ethan co-founded and was Managing Partner of RDG Capital, a fundamental value-focused, activist hedge fund. Prior to joining RDG in 2009, Ethan worked at GCA Savvian Group, first in their mergers and acquisitions advisory business, then in their principal investing unit. Ethan earned a Bachelor of Arts degree in Political Economy from Princeton University, graduating with Honors.



## Barry Broome

President & CEO, Greater Sacramento Economic Council (Sacramento)

Barry Broome serves as the first President & CEO of the Greater Sacramento Economic Council. Barry is responsible for leading community-driven efforts to attract, grow and scale new businesses; develop advanced industries and guide new job-creation strategies throughout the six-county region. In his role, he has established the first public/private partnership economic development organization led by chief executive officers in California. The organization is led by 40+ CEOs and 20 communities in the Greater Sacramento region. Previously, Barry was the President & CEO of the Greater Phoenix Economic Council (GPEC) where he delivered more than 50,000 jobs and 250 company locates into the Phoenix region. Under his leadership, for six out of the ten years, GPEC was named one of the top economic organizations in North America by Site Selection Magazine. In 2013, he was also named Arizona Economic Developer of the Year, Arizona Real Estate Executive of the Year and received the Phoenix Black Chamber of Commerce award.



## Sarah Moyer

Vice President, Jasper Ridge Partners (San Francisco)

Sarah Guzick Moyer is a Vice President of Jasper Ridge Partners and a member of the private equity team, where she focuses on direct/co-investments, in addition to working on manager selection and secondary transactions. Prior to joining Jasper Ridge Partners in 2020, Sarah worked on direct private equity and venture capital investments at Francisco Partners and G2VP. Previously, Sarah worked for Tesla as a Senior Project Manager leading financial and technical due diligence in the Commercial and Industrial Energy division. Sarah earned a BA in Political Science from Yale University and an MBA from the Stanford Graduate School of Business.



## Thomas Abramo

Managing Director, SVB Private (San Francisco)

Thomas Abramo is based in San Francisco as a Private Wealth Advisor responsible for partnering closely with clients on all aspects of wealth management. He has significant experience with customized portfolio construction incorporating traditional and alternative investment strategies as well as ESG, SRI, sustainable and impact investment mandates across major asset classes. Thomas was most recently a Senior Portfolio Manager with Abbot Downing, a Wells Fargo company, after spending time on their San Francisco foreign currency trading floor as a Strategist. His prior experience includes investment roles at Capital Group Companies and Willis Towers Watson. He began his career practicing public accounting in both the tax and audit departments of Hood & Strong while also providing investment advisory services through their multi-family office subsidiary. Thomas received his B.A. degree in Business Economics with Accounting from the University of California at Santa Barbara (UCSB). He is a holder of the right to use the Chartered Financial Analyst® (CFA®) designation and earned the Certified Public Accountant (CPA) license, although not currently practicing. Thomas is an active member of the CFA Institute and CFA Society of San Francisco, serving as a past audit committee chair member. Thomas lives in Marin County with his wife and children where he is an avid volunteer and youth coach within his community as well as a board member of the Ross School Foundation.



## Daniel Eisenberg

Associate Director, Private Equity, C.M. Capital Advisors (San Francisco)

Mr. Eisenberg supports C.M. Capital Advisors' private equity investment activities by sourcing, executing, and monitoring both partnership and direct co-investments. Prior to joining C.M. Capital Advisors, Mr. Eisenberg worked as an investment associate at Performance Equity Management, a Connecticut based private equity fund of funds, where he made both partnership and direct co-investments across the buyout and venture capital industry. Mr. Eisenberg holds a BA in Economics from Tufts University, with a minor in Entrepreneurial Leadership. Mr. Eisenberg is also a CFA Charterholder.





## Brendan MacDonald

Partner & COO, SRE, StepStone Group (San Francisco)

Mr. MacDonald is a partner and Chief Operating Officer for StepStone Real Estate. He is also involved in various investment and portfolio management activities. Prior to joining StepStone in 2014, Mr. MacDonald was a founding partner of Clairvue Capital Partners, a real estate investment manager that integrated with StepStone to establish StepStone Real Estate. At Clairvue, he was an investment committee member and sourced, underwrote, and managed investments in the US, Europe, and Latin America. Before Clairvue, he was a director at Liquid Realty Partners, an investment manager focused on real estate private equity secondaries. Mr. MacDonald received his BS from Indiana University and MBA from Harvard Business School.

## 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. Prior to JPMorgan Asset Management, Mr. Ide was a Director, Corporate Banker and lender at Banc One Capital Markets, a division of Bank One Corporation (NYSE: ONE) which was later acquired by JPMorgan Chase in 2004. While at Banc One Capital Markets, he originated, structured and underwrote more than \$3 billion in asset backed credit securities. Mr. Ide was also a Credit Analyst at The First National Bank of Chicago, which was later acquired by Bank One Corporation.



## Tarrell V. Gamble

Chair of Investment Committee, Alameda County Employees' Retirement Association (San Francisco)

Mr. Gamble joined Blaylock Van in 2001 and has over 20 years of capital markets, sales & trading and market analysis experience with the firm, specializing in debt and equity underwriting for Fortune 500 companies. In addition to his responsibilities in capital markets, Mr. Gamble leads the BV summer internship program. Mr. Gamble is a Trustee of the Alameda County Employees Retirement Association, Trustee of the Alameda County Health Foundation and is the President Emeritus of the Board of San Francisco Achievers scholarship program. Mr. Gamble earned a Bachelor of Science degrees in both Finance and Banking from San Francisco State University. He also completed the Tuck Executive Education at Dartmouth program. He also holds Series 7, 55, 66 licenses.



## Kaush Amin

Managing Director, Head of Private Market Investing, U.S. Bank (San Francisco)

As a Managing Director in the Private Market Group of U.S. Bank Wealth Management, Kaush heads the private market investment program at U. S. Bank for Ascent Private Capital Management, Private Wealth Management, Wealth Management and Institutional Asset Management while providing strategic leadership in this area. Kaush has more than 20 years of investment management experience. Prior to joining U.S. Bank in 2016, he was a senior member of the investment team at Fort Washington Capital Partners, where he led private equity investments across primary, secondary and direct opportunities. Before this role, Kaush led strategy and corporate development initiatives at Western & Southern Financial Group, a Fortune 500 financial services company. Before attending business school, he was a Principal with Fidelity Investment's strategic technology investments group where he was responsible for innovation, and direct investments in technology companies. MBA. Finance and Strategy, Duke University/ MS, Computer Engineering, Northeastern University/ BS, Electrical and Computer Engineering, Mumbai University



## Neeraj Rama

Chief Investment Officer, Comprehensive Blood & Cancer Center (San Francisco)

I have built my career on the steadfast belief that global change presents opportunities to transform the human experience. My leadership continues to cultivate an environment that celebrates human progress, advocates rigorous innovative research, and embraces hard work in order to turn those opportunities into a reality for stakeholders. All my life I have been relentlessly curious, that attempts to live by strong values every day, take responsibility for how I impact people and the environment around me, and empowering the work of the teams I work with to constantly and consistently raise the bar. I have been walking around Wall St. with a common man's coat since I started in the industry in 2006, working for a proprietary investment fund set up by struggling Investment Banks during my time as a student at CSUB, where I was also the President of FMA (Financial Management Association). Later I completed my undergraduate studies in Investment Finance & International Business, and after finishing my MBA focused towards Financial Economics & Capital Markets I joined Morgan Stanley. It was during that time where I worked in broad functions from Wealth Management to M&A, and many other core processes at the firm. I am an ambitious and enthusiastic individual, who has focused my career to harness the power of Capital Markets to make the world a better place. After spending time at Morgan Stanley during the acquisition of Smith Barney, I then took that passion to the Family Office Industry, Eventually working my way up to Chief Investment & Strategy Officer for a group of Global Family Offices. Since taking this role, I have grown my work in Healthcare, Information Technology, and countless other Industrial Ventures. I am also on the Board of Directors for Private Venture Funds and starts ups.



## Anna Langs

Managing Director, Asset Allocation, San Francisco Employees' Retirement System (San Francisco)

Anna Langs, CFA, FRM, Managing Director, Asset Allocation, Risk Management, Innovative Solutions at San Francisco Employees' Retirement System. Anna Langs was Head of Investment Risk for Abu Dhabi Investment Authority designing, architecting and implementing investment risk management framework for one of the largest sovereign funds in the world. Prior to ADIA, Anna was Chief Risk Officer at three multi-billion-dollar investment funds including AXA Rosenberg, Fortress Investment Group, and First Quadrant L.P. Her interest in risk management and proprietary investment and risk models developed over the course of a 20+ year career in the financial services, working as quantitative strategist and risk and analytics manager at Western Asset Management, Merrill Lynch Intelligent Technologies Group, and D.E. Shaw.



## Ryan Breslin

Partner Private Markets, Albourne Partners (San Francisco)

Ryan Breslin is a Partner on Albourne's Private Markets Team with responsibilities in fund research and manager assessment. Ryan is based out of San Francisco and has a primary focus on buyouts and growth equity strategies. Prior to joining Albourne in 2018, Mr. Breslin was an Investment Analyst at Alameda County Employees' Retirement Association. Ryan holds a CAIA designation and received a BS from the University of Oregon and holds an MBA from Portland State University.



## Benjamin Sparks

Partner-in-Charge, Transaction Tax Advisory, Weaver (Dallas)

Ben has more than 20 years of industry experience as a tax attorney. He has extensive experience with federal and international tax matters, including cross-border transactions; tax planning; and tax structuring for investment funds, public and private clients. Ben has assisted many investment partnerships, such as hedge funds, private equity funds and venture capital partnerships, in addressing the economic and tax implications related to the investments and allocations relevant to their particular situations. With these various clients, Ben has driven the tax analysis for clients across many different industries, such as health care (including physician-owned practices, home health, urgent care, dental, and implementation of the MSO structure and SPAC acquisitions), financial services (including mortgage servicing, title insurance, broker-dealers), manufacturing and distribution, construction and telecom. Ben has assisted private equity clients assess the tax risks on such deals, and work through the structuring considerations. He has also assisted founder-owned businesses complete the sale process by minimizing the tax risk and the potential tax costs on a transaction.



## Nate Leung

Partner, Sapphire Partners (San Francisco)

Nate invests in early-stage venture capital funds on the Sapphire Partners team. He is passionate about partnering with established and emerging firms and supporting aspiring GPs. Before joining Sapphire Partners in 2019, Nate worked on the investment team at Industry Ventures focused on primary and secondary investments in venture capital funds, and direct co-investments in growth-stage companies. Prior to Industry Ventures, Nate held operating roles at early-stage startups including Optimizely where he helped build the technology partner ecosystem. He started his venture capital investment career at Bain Capital Ventures. Nate earned a bachelor's in management science & engineering at Stanford and an MBA from Harvard Business School. He enjoys spending time outdoors and devours epic fantasy and science fiction novels. He was named to the Venture Capital Journal Rising Stars list in 2022.



## Stephen Bluestein

Managing Director, Investments, The David and Lucile Packard Foundation (San Francisco)

Stephen Bluestein serves as Managing Director, focusing on Private Equity. Prior to joining the Foundation in February 2021, Stephen was on the direct investing side with senior positions at Light Street Capital, Technology Crossover Ventures, and Bessemer Venture Partners. Stephen holds an M.B.A. from Kellogg School of Management, an M.S. from Stanford University, and a B.S. from Tufts University.



## Brett Horton

Chief Investment Officer, Paris-Roubaix Group (San Francisco)

Brett is Chief Investment Officer & Head of Business Strategy at Paris-Roubaix Group, a \$6B+ US-based global single family office with investments and operating companies spanning six continents. The investment portfolio focuses on long term growth, and returns are driven mainly through direct investment and strategic asset manager allocations. Previously Brett served as a Senior Consultant and Principal at Mercer Investments.



## Bob Hellman

CEO, Partner, American Infrastructure Partners (Foster City)

Bob co-founded American Infrastructure in 2006 and has been a private infrastructure investor for over 30 years with a focus on creating unique investment platforms focused on addressing the intractable infrastructure challenges of communities. Before founding AIP, he was a managing director of McCown De Leeuw, a middle-market investment firm, and gained significant experience in mergers, acquisitions, and business strategy at Bain & Co. MBA: Harvard Business School (Baker Scholar); MS: London School of Economics; BA: Stanford University.



## Tom Bratkovich

Senior Vice President, Investments, DCA Partners (San Francisco)

Tom is the Senior Vice President of Investments for the DCA Family Office. Tom oversees DCA's investment strategy, portfolio construction, deal sourcing, and investment underwriting activities for DCA's Family Office clients. Tom has served as a senior team member at Wilshire Associates, where he was responsible for business development, new product launch, and deal sourcing for a \$30 Billion AUM fund-of-funds platform allocating \$2B/year to private equity, private credit, and private real assets investments. He also developed and managed a co-investment platform for tens of family offices. Prior to Wilshire, Tom worked at Longview Investment Partners and LP Capital Advisors and advised large institutional investors such as CalPERS, CalSTRS, and NY Common. He was also a venture capital investor early in his career. Tom holds a BS in Aerospace Engineering from UCLA, an MS in Aero/Astro Engineering from MIT, and an MBA with Distinction from Harvard Business School.



## Ian Park

Investment Director, Korea Investment Corporation (San Francisco)

Ian Park is an investment director at KIC San Francisco, Korea's sovereign wealth fund that manages \$200B where he leads Data and AI investments. He invests in PE/VC funds and also directly in companies and startups. Before KIC, Ian was on the GP side at VMG Partners, Bertram Capital. He started his career in consulting at BRG, McKinsey & Company.



## Charlie Grimes

Managing Director, Head of Global Capital Markets, Forge (New York)

Charlie Grimes, CFA, is a Managing Director and Head of Global Capital Markets at Forge Global, a leading provider of private market trading services, data, and technology. In his current role he oversees the day-to-day activities on the secondaries transactions desk which has facilitated trades in over 500 private companies and partners with Forge Global Advisors, Forge Global's RIA, which manages Funds on more than 80 private company cap tables for 1,800+ LP's. Charlie has more than a decade of experience in the private markets – he previously worked at SharesPost as a Private Securities Broker and Head of their New York Office before joining Forge in 2021. Prior to embarking on a career in the private markets, he worked in sales and distribution at Pacific Investment Management Company (PIMCO) and Investment Management for Ultra High Net Worth Individuals and Family Offices at Wells Fargo Family Wealth.



## Martha Heitmann

Partner, LGT Capital Partners (San Francisco)

Martha Heitmann (Japanese) is a Partner at LGT Capital Partners in San Francisco. She is responsible for origination, due diligence, execution and monitoring of European secondary transactions, and she chairs the Diversity & Inclusion Committee. Prior to joining the firm in 2007, Ms. Heitmann worked in business development for Telephia Inc. in San Francisco. From 2001 to 2003 she was a corporate and investment banking analyst for Bank of America Securities in San Francisco. Ms. Heitmann holds a BA in Economics from the University of Chicago and an MBA from INSEAD. She is fluent in English and Japanese and conversant in German.



## Vince Gubitosi

Co-Founder and Co-President, Accuidity (Boston)

Vince Gubitosi is a co-founder and co-president of Accuidity. He is a financial services executive with a twenty-five-year record of managing and growing successful businesses with a focus on fund management, proprietary trading, technology development, and risk management in traditional and alternative asset classes. He spent 15 years at Geode Capital Management where he was President from 2009-2021. At Geode he grew the index and quantitative fund business, in partnership with Fidelity Investments, from \$75 billion to \$750 billion of AUM and launched over 100 funds investing in equities and commodities. Previous to his role at Geode, he was a Portfolio Manager in the Quantitative Credit Business at Citadel Investments.



## Ira Simkhovitch

Managing Director, Industry Ventures (San Francisco)

Ira concentrates on originating, valuing and managing secondary investments. Prior to Industry Ventures, Ira was an investor at The Carlyle Group/AlInvest Partners where he committed capital to private equity and venture capital funds. Previously, Ira was a Senior Analyst at Commonfund Capital investing in private equity funds, secondary investments and direct investments globally. Ira began his career at Booz Allen Hamilton on a team developing software and analytics for the Department of Defense. Ira received a BS in engineering from MIT and his MBA from Columbia Business School.



## Terry Darling

Managing Director, CrossBay Capital (Greenwich)

Terry Darling has over 30 years of experience as a private capital fundraiser, alternative investments allocator, independent sponsor and equity research analyst. At CrossBay Capital Partners — a boutique placement agent for private equity, credit and real asset funds based in New Canaan, CT — Terry works with both GP's and LP's. Prior to CrossBay, Mr. Darling worked on the alternatives investment portfolio at White Mountains Insurance, spent 3 years as an independent sponsor, and was a Managing Director and sector head of the Energy and Industrials Equity Research teams at Goldman Sachs. Mr. Darling is past Chairman of the Endowment Commission at Christ Episcopal Church in Greenwich, CT and is co-Head of the New York Regional Board of the University of Virginia College Foundation.

# PRE-EVENT NETWORKING COCKTAIL

Tuesday, September 5th

5:30pm – 8:30pm PT

Location: San Francisco Wine Society

408 Merchant St, San Francisco, CA 94111

Sponsored By:

**Revere**





# AGENDA OUTLINE

8:00 AM PT

## Registration & Breakfast Networking

Sponsored by:



8:30 AM PT

## Opening Remarks

Erick Cruz, Senior Vice President, Carmo Companies

9:00 AM PT

## LP Perspectives on the 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:

Joncarlo Mark, Founder, Upwelling Capital Group

Panelists:

Matt Diestel, Partner & Head of US, QIC Private Capital

Kaush Amin, Head of Private Market Investing, U.S. Bank

Ethan Doyle, Managing Director, AITi Tiedemann Global

Anna Langs, Managing Director, Asset Allocation, San Francisco Employees' Retirement System

10:00 AM PT

## AM Networking Break

Sponsored By:



# AGENDA OUTLINE

10:30 AM PT

## LP Perspectives on Growth & Venture

Leading Growth and VC investors discuss current state of the market, Fundraising environment, valuations and opportunity sets.

**Moderator:**

**David York**, Managing Director & Founder, **Top Tier Capital Partners**

**Panelists:**

**Ian Park**, Investment Director, **Korea Investment Corporation**

**Sarah Moyer**, Vice President, **Jasper Ridge Partners**

**Nate Leung**, Partner, **Sapphire Partners**

**Stephen Bluestein**, Managing Director, Investments, **The David and Lucile Packard Foundation**

11:30 AM PT

## Private Credit: The Golden Era

Investors and Managers discuss their investment activity in Private credit. How long will this window of opportunity last?

**Moderator:**

**Terry Darling**, Managing Director, **CrossBay Capital**

**Panelists:**

**Nelson Chu**, Founder & CEO, **Percent**

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

**Tom Bratkovich**, Senior Vice President, Investments, **DCA Partners**

# AGENDA OUTLINE

12:30 PM PT

## Networking Luncheon

Sponsored by:



1:30 PM PT

## Vivek Ranadive: The American Dream

Vivek Ranadive shares his journey from Bombay to basketball, discussing sport as an asset class. He also gives insight on Bow Capital's unparalleled partnership with the University of California Board of Regents.

Interviewer

Barry Broome, President & CEO, Greater Sacramento Economic Council

Keynote Speaker:

Vivek Ranadive, Chairman, CEO & Governor, Sacramento Kings, Founding Partner, Bow Capital

2:00 PM PT

## Private Equity: Middle Market to Buyout

On this session leading institutional investors and fund managers talk about their buyout and middle market 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?

Moderator:

Benjamin Sparks, Partner-In-Charge, Transaction Tax Advisory Services, Weaver

Panelists:

Justine Liu, Vice President, Private Equity, Makena Capital Management

Tarrell V. Gamble, Chair of Investment Committee, Alameda County Employees' Retirement Association

Ryan Breslin, Partner Private Markets, Albourne Partners

Bob Hellman, CEO, Partner, American Infrastructure Partners

3:00 PM PT

## Afternoon Networking Break

Sponsored by:



# AGENDA OUTLINE

3:30 PM PT

## The State of Secondaries

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:

Charlie Grimes, Managing Director, Head of Global Capital Markets, **Forge**

Panelists:

Brendan MacDonald, Partner & COO, SRE, **StepStone Group**

Martha Heitmann, Partner, **LGT Capital Partners**

Vince Gubitosi, Co-Founder and Co-President, **Accuity**

Ira Simkhovitch, Managing Director, **Industry Ventures**

4:30 PM PT

## Family Office & RIA 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:

Justin Kunz, Director, U.S. Family Office, **BlackRock**

Panelists:

Daniel Eisenberg, Associate Director, Private Equity, **C.M. Capital Advisors**

Thomas Abramo, Managing Director, **SVB Private**

Neeraj Rama, Chief Investment Officer, **Comprehensive Blood & Cancer Center**

Brett Horton, Chief Investment Officer, **Paris-Roubaix Group**

William DeMar, Senior Director, **Choreo**

5:30 PM PT

## Cocktail Reception

Location: The Treasury  
200 Bush Street, Suite 101  
San Francisco, CA 94104

Sponsored by: 

PRIVATE MARKETS CALIFORNIA MEETING





PARTICIPATION OPTIONS



# PARTICIPATION OPTIONS

## COMPLIMENTARY

We only invite Limited Partners at no cost. We qualify LPs as Public Pensions, Corporate Pensions, Pension Consultants/OCIOs, Superannuation Funds, Foundations, Sovereign Wealth Funds, Endowments, Hospital Systems, 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 invited as an LP and are caught pitching a fund or deal, you will be banned from the Carmo platform. There is nothing wrong with raising capital, just be honest with us and your intentions. If you're not a true LP, you must pay to play.

## STANDARD PASS

- **Pass**

- 1 pass to full conference, event cocktail hours and networking sessions.
- *Attendee list Not included*

~~Early Bird: \$1,500 USD~~ **Ends July 21st**

~~Pre-Registration: \$2,000 USD~~ **Ends August 25th**

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

# PARTICIPATION OPTIONS

## ATTENDEE LIST SPONSORSHIP

- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the 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.
- **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 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.
- **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 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.
- **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 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.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.
  - Entitled to a Full-Page Advertisement in conference brochure

**\$25,000 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

**\$50,000 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.

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