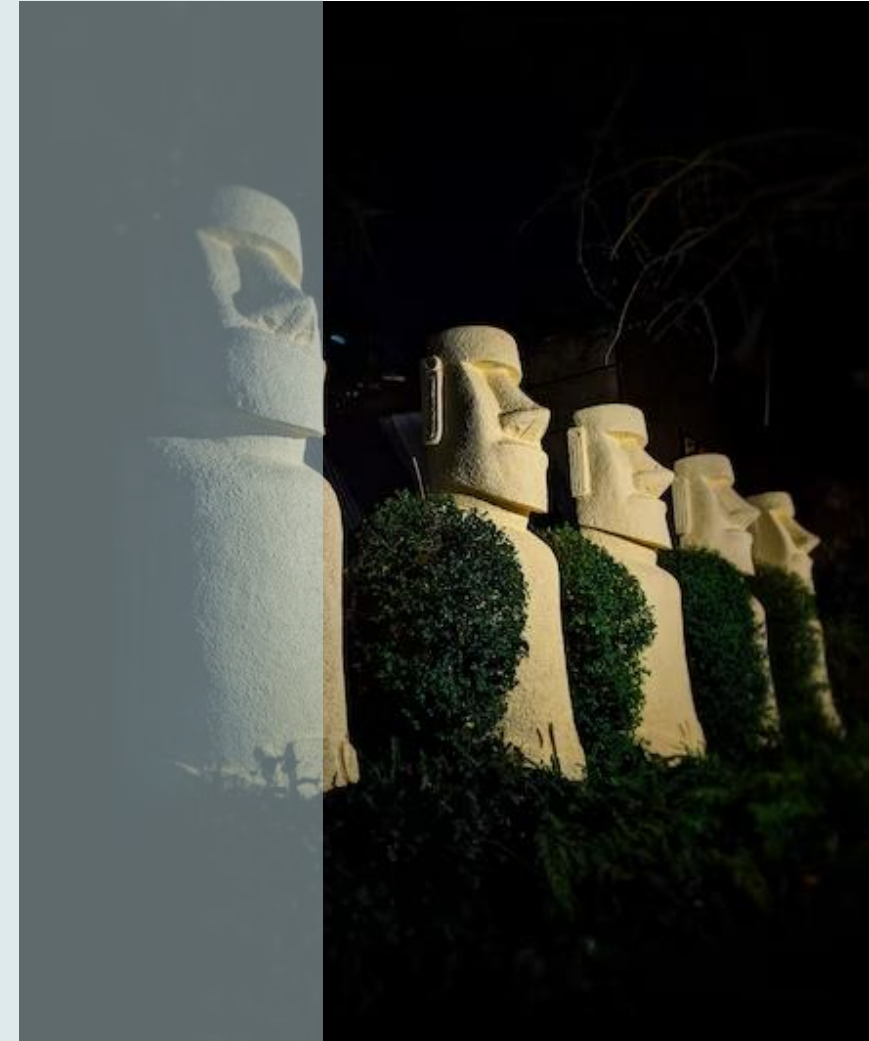




# THE PRIVATE MARKETS CHILE MEETING

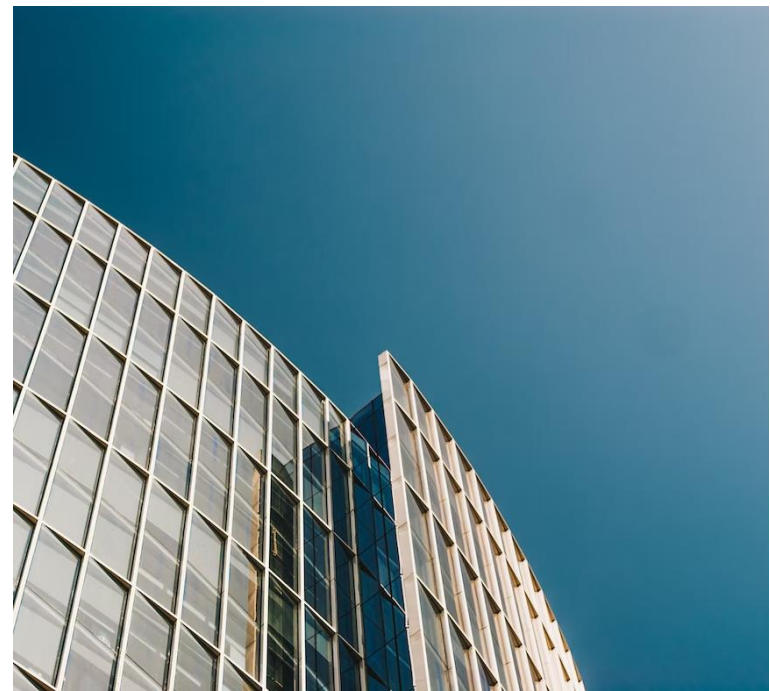
The Ritz-Carlton, Santiago, Las Condes, Región  
Metropolitana, Chile

November 29th & 30th, 2023



# TABLE OF CONTENTS

Introduction	3
By The Numbers	4
In Attendance	5
Institutional Partners	6
Lead Sponsors	7
Sponsors	8-12
Speaker Bios	13-25
Conference Agenda	26-31
Participation Options	32-36
Carmo Contact Info	37





# THE PRIVATE MARKETS CHILE MEETING

THE RITZ-CARLTON, SANTIAGO, LAS CONDES,  
REGIÓN METROPOLITANA, CHILE  
NOVEMBER 29TH & 30TH, 2023

Dear Colleague,

It is with great pleasure that I invite you to join us at the Private Markets Chile Meeting. This exclusive institutional gathering brings together the most important and active institutional allocators and family offices in Andean region 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 Santiago!

Best,

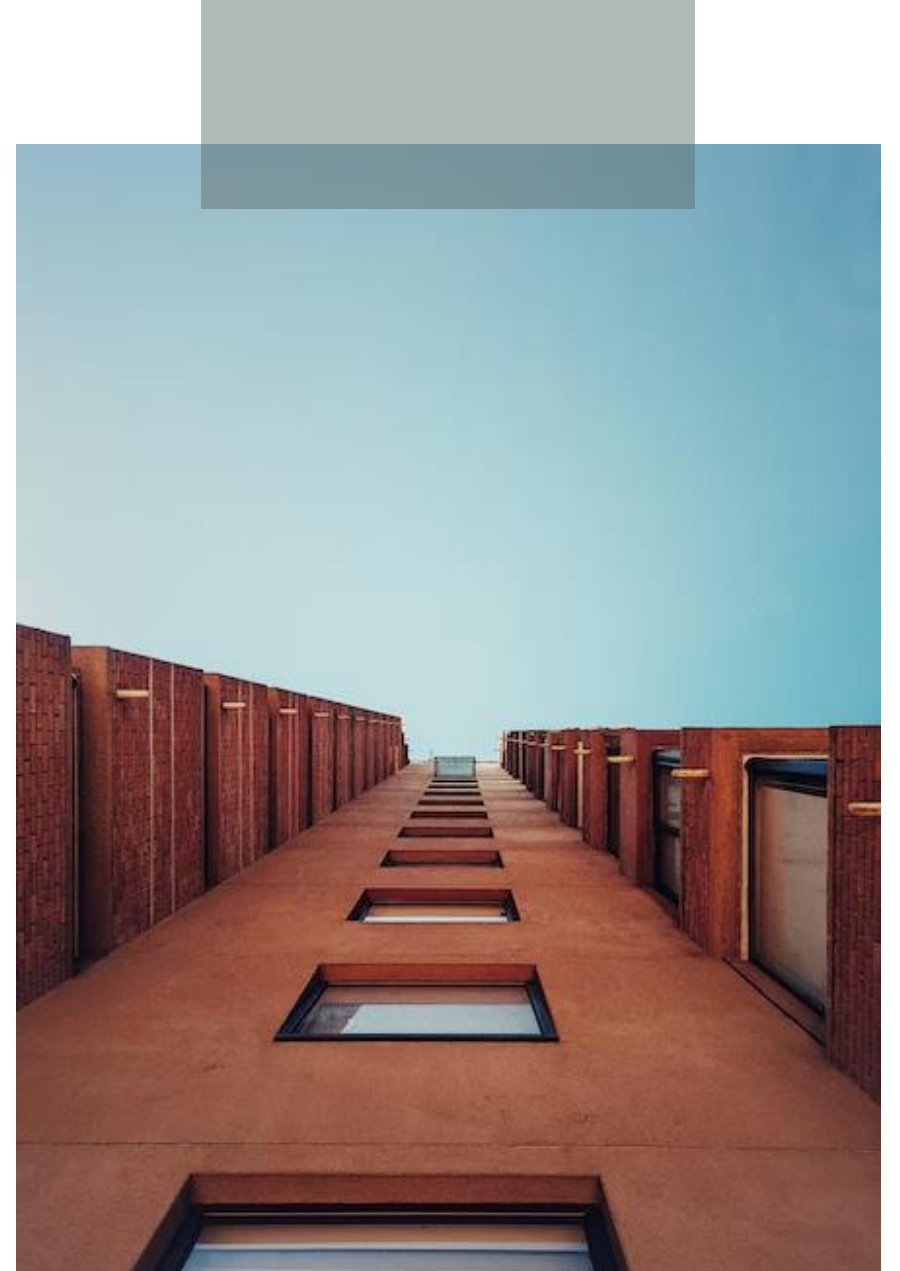
Roy Carmo Salsinha  
**President, CEO**  
Carmo Companies



# BY THE NUMBERS

---

- \$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
- 2 Pre-Event Networking Cocktail







# IN ATTENDANCE

---

## 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



**amCHam** **CL**



We are a financial group with 40 years of experience in the industry. Since our beginnings we have stood out for offering personalized, quality and professional attention to our clients.

We offer a wide access to markets in Chile and abroad, with a diversified range of products, services and consulting services that respond with timeliness to the requirements of our customers, helping them to achieve their objectives. Flexibility and innovation have been the roadmap we have followed when adapting our offer to their high demands.

All these attributes have been and will always be our hallmark and that of our entire team of professionals. Today we have offices in Chile and Peru.

We reach end customers in: Peru, Colombia, Mexico, USA, England, Argentina and Brazil.



# 2023 SPONSORS



We are a subsidiary, composed of professional managers, owned by CAF - the development bank of Latin America and the Caribbean - for the mobilization of resources from private, local, and international capital towards priority infrastructure projects for the development of the region. Established in 2014, CAF Asset Management Corp. (CAF-AM) is the fund management entity of CAF. It is responsible for managing third-party capital funds primarily aimed at the private financing of infrastructure projects in CAF shareholder countries. CAF-AM presents an innovative independent business model supported by a robust corporate governance structure and experienced management in the region, providing institutional investors with the unique opportunity to benefit from CAF's presence and experience in Latin America, its impeccable credit history, and its robust pipeline of projects. Among the investors in CAF Asset Management Corp. are pension funds, insurance companies, development banks, and professional asset managers.



Cobra Carmo Group is a vertically integrated, real estate development company delivering institutional quality, purpose-built residential rental communities within the four major metropolitan areas of Texas. Born in Mexico, Raised in Texas, Cobra Carmo is a joint venture between Mexico City based Cobra Development and New York based Carmo Companies. Together, the partners have developed and invested in over 5 million square feet of commercial and residential projects across North America.



Crow Holdings Capital (CHC) is a Dallas, TX based real estate investment management company specializing in multifamily, industrial, and specialty property types delivered through strategies that span the risk-return spectrum. For 25 years, CHC has sought out a diversified portfolio in partnership with leading global investors and generating attractive returns across market cycles. Led by a highly experienced leadership team, CHC manages \$16 billion in real estate assets across the U.S. and is a subsidiary of Crow Holdings, a privately owned real estate investment and development firm with 75 years of history, \$30 billion of assets under management, and an established platform with a vision for continued success. The firm's ongoing legacy is rooted in its founding principles: partnership, collaboration, and alignment of interests. For more information, please visit [www.crowholdings.com](http://www.crowholdings.com).



Evercore leverages one of the largest and most experienced private markets advisory teams in the industry across private assets and real estate. Evercore Private Capital Advisory (PCA) advises investors in private assets, including LPs and GPs, in secondary liquidity solutions including LP portfolio sales, GP-led continuation funds, tender offers and other structured capital solutions. PCA has been awarded 'Secondaries Advisor of the Year' in the Americas for seven consecutive years by Private Equity International (PEI). Evercore Real Estate Capital Advisory (RECA) provides strategic advisory and capital raising solutions to private real estate sponsors globally. RECA provides strategic advice and thoughtful execution across all real estate sectors, strategies, and transaction types including portfolio sales and recapitalizations, continuation vehicles, joint ventures, funds, M&A, and other bespoke advisory assignments. RECA has been awarded 'Capital Advisory Firm' of the year for four consecutive years by Private Equity Real Estate (PERE).





# SPONSORS



Hamilton Lane (Nasdaq: HLNE) is one of the largest private markets investment firms globally, providing innovative solutions to institutional and private wealth investors around the world. Dedicated exclusively to private markets investing for more than 30 years, the firm currently employs approximately 600 professionals operating in offices throughout North America, Europe, Asia Pacific and the Middle East. Hamilton Lane has nearly \$857 billion in assets under management and supervision, composed of \$112 billion in discretionary assets and approximately \$745 billion in non-discretionary assets, as of March 31, 2023. Hamilton Lane specializes in building flexible investment programs that provide clients access to the full spectrum of private markets strategies, sectors and geographies. For more information, please visit [www.hamiltonlane.com](http://www.hamiltonlane.com) or follow Hamilton Lane on LinkedIn: <https://www.linkedin.com/company/hamilton-lane/>.



HarbourVest is an independent, global private markets firm with 40 years of experience and globally more than \$98 billion of assets under management as of March 31, 2022. Our interwoven platform provides clients access to global primary funds, secondary transactions, direct co-investments, real assets and infrastructure, and private credit. Our strengths extend across strategies, enabled by our team of more than 850 employees, including more than 180 investment professionals across Asia, Europe, and the Americas. Across our private markets platform, our team has committed more than \$51 billion to newly-formed funds, completed over \$41 billion in secondary purchases, and invested over \$28 billion in directly operating companies. We partner strategically and plan our offerings innovatively to provide our clients with access, insight, and global opportunities.



HD Legal was founded in 2014 by José Luis Honorato, Gonzalo Delaveau and Sebastián Delpiano, all lawyers with extensive experience in the areas of corporate, financial and capital markets law. Subsequently, in 2017 Juan Ignacio Peña, an expert in the areas of real estate law and engineering and construction, joined the firm as a partner. Following the strong growth experienced by HD Legal, Matías Langevin, who has extensive background in Fintech and Banking & Finance, joined the firm in 2019 as a partner.



Kingbird deploys capital on behalf of Grupo Ferré Rangel and third-party family offices and other investors. As a family office investor and partner with a fiduciary mindset, Kingbird understands the importance of institutional best practices and open communication and is focused on protection and capital growth. The Kingbird executive management team has over 60 years of real estate investment experience with first-tier public companies, institutional real estate funds and family offices. With a commitment to trust, transparency and aligned interests, Kingbird builds long-term value by investing in a diversified portfolio of carefully selected properties, guided by a highly disciplined investment process, an experienced team and collaboration with carefully-selected local operating partners.



# SPONSORS



Founded in 2015, Kline Hill Partners is an investment firm focused on the private equity secondary market, with industry-leading capabilities in the small-deal space. We have a deep and experienced team that is committed to working with sellers and general partners to find solutions that best fit their specific needs. We pride ourselves on being collaborative, responsive, and flexible throughout the entire process. With over \$3B in assets under management, our funds are backed by a blue-chip investor base that includes endowments, foundations, family offices, and other institutional investors. Since our founding, we have completed more than 400 transactions, transferring over 1,300 fund and direct company interests along the way. Together, our Core and Solutions strategies make up a platform designed to serve the entirety of the small-deal secondary market, with capabilities spanning LP fund transfers, GP-led transactions, and secondary direct transactions.



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.



Monroe Capital LLC ("Monroe") is a premier boutique asset management firm specializing in private credit markets across various strategies, including direct lending, technology finance, venture debt, opportunistic, structured credit, real estate and equity. Since 2004, the firm has been successfully providing capital solutions to clients in the U.S. and Canada. Monroe prides itself on being a value-added and user-friendly partner to business owners, management, and both private equity and independent sponsors. Monroe's platform offers a wide variety of investment products for both institutional and high net worth investors with a focus on generating high quality "alpha" returns irrespective of business or economic cycles. The firm is headquartered in Chicago and maintains 10 offices throughout the United States and Asia. Monroe has been recognized by both its peers and investors with various awards including Private Debt Investor as the Lower Mid-Market Lender of the Decade, 2022 Lower Mid-Market Lender of the Year, 2022 CLO Manager of the Year, Americas, by Private Debt; 2022 Best Performance in Private Debt – Mid Cap by Korean Economic Daily; Global M&A Network as the 2022 Small Mid-Markets Lender of the Year, Americas; Creditflux as the 2021 Best U.S. Direct Lending Fund; and Pension Bridge as the 2020 Private Credit Strategy of the Year. For more information and important disclaimers, please visit [www.monroecap.com](http://www.monroecap.com).



Osceola Capital is a Florida-based, lower middle-market private equity firm currently investing out of its inaugural institutional fund. Osceola acquires high-quality services businesses that, due to their size, are not actively pursued by institutional capital. With a proven integration playbook, Osceola transforms these companies (100+ acquisitions in Fund I) into fully integrated, cohesive platforms at a scale that feeds into significant institutional market demand. This strategy offers private equity exposure to a segment of the economy that is difficult to access while pairing well from a diversification standpoint with allocations to up-market funds. Osceola is preparing to raise its next fund and is initiating conversations with potential investors about the opportunity.



# SPONSORS



Paramount Group is one of the largest vertically integrated publicly traded office REITs ([www.pgre.com](http://www.pgre.com)) and has a 40+ year track record of owning and operating class A office properties located in high barrier to entry US gateway central business district submarkets. Paramount is headquartered in New York and maintains offices in New York and San Francisco. The firm owns/manages ~14 million square feet and has a current AUM of \$9.2 billion. PGRE is currently fundraising for a special situations distressed fund - Fund XI - which will aim to achieve a 15.0%+ net IRR by investing in class A office assets in gateway assets that have broken capital structures. Investments will be up and down the capital stack and will take the form of mezzanine debt, preferred equity, and common equity. The fund target is \$700mil.



Peachtree is a private equity investment, asset and fund management firm focusing on opportunistically deploying capital across its distinct operating and real estate divisions, including hospitality, commercial real estate lending, residential development, and capital markets. Since its founding in 2008, the company has completed hundreds of real estate investments valued at more than \$8.2 billion in total market capitalization and currently has more than \$2.5 billion in equity under management. For more information, visit [www.peachtreegroup.com](http://www.peachtreegroup.com).



Preqin, the Home of Alternatives™, empowers financial professionals who invest in or allocate to alternatives with essential data and insight to make confident decisions. It supports them throughout the entire investment lifecycle with critical information and leading analytics solutions. The company has pioneered rigorous methods of collecting private data for 20 years, enabling more than 200,000 professionals globally to streamline how they raise capital, source deals and investments, understand performance, and stay informed.



Built specifically for rising, uncertain rate environments, RMWC's short-term, low loan-to-value, floating rate, primarily senior secured exposures are specifically designed to perform well in current market conditions. Coleman Andrews, Co-founding Partner of Bain Capital, and Steven Fischler, a veteran of the 2008-2011 Lehman real estate recoveries, lead RMWC's team of 13 professionals. By emphasizing capital preservation under all circumstances, over the past 11+ years RMWC averaged realized annual loan losses of 1 basis point. RMWC is accepting new capital into Fund IV, which is currently generating net annualized returns of 11-13% with REIT-based tax advantages.



# SPONSORS

SDI is a U. S. boutique investment firm focusing on a niche investment strategy: under performing debt backed by commercial real estate assets throughout the United States. Founded in 2009, our current team has been together for 7+years, covering distressed CRE assets with strong performance during both upcycles and downcycles. Each senior management team member has 10+ years of experience with vast knowledge across an array of disciplines including property management, finance, capital markets, acquisitions, law, development, sales, and leasing. SDI has implemented and refined an origination and underwriting process to successfully acquire, manage, and reposition distressed loans and REO leading to opportunistic returns. Our Asset Management team is another cornerstone of our value proposition - the team is comprised of seasoned professionals that bring a common sense and hands on business approach. SDI focuses on what we call the small balance loan market – we concentrate on opportunities in the US\$3-25 Mn range with our sweet spot between US\$5-15 Mn. Our holistic approach seeks to generate alpha by focusing on the highest portion of the capital stack (senior debt) while generating equity-like returns with a lower risk profile compared to other alternative investments.



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.



Westmount Realty Capital, LLC is a time-tested, privately held, Dallas-based commercial real estate company that has achieved exceptional performance, with a core team in place, for more than 35 years. Westmount is seen as an innovator and leading-edge company in the industry and is a relationship-driven trusted operating partner of numerous U.S. and foreign institutional and private capital sources. The company is active within the U.S., specializing in value add and opportunistic investments, and has navigated successfully through multiple market cycles. For additional information, contact [www.westmountrc.com](http://www.westmountrc.com).

## Alberto Ñecco

CEO, CAF Asset Management (Perú)



Alberto Ñecco is a Peruvian economist from the University of Lima, holding a Master's in Business Administration (MBA) from the European Institute of Business Administration (INSEAD). The General Manager of CAF-AM boasts over 20 years of experience in the financial sector and investment banking, having worked with institutions such as ING Bank, Deutsche Bank, Banco de Crédito del Perú, and Credicorp Capital. He actively contributed to the establishment of Credicorp Capital, overseeing the acquisition of leading investment banks in Colombia and Chile. Subsequently, he became the first Regional CFO of Credicorp Capital and later served as the Executive Director of Corporate Development, playing a key role in the creation of the Credicorp/Sura partnership for the development of private debt investment funds for infrastructure projects in Peru and Colombia. More recently, Alberto Ñecco has been involved in the public sector, serving as the Deputy Minister of Transport and Executive Director of the Private Investment Promotion Agency (ProInversión). During his tenure, he successfully awarded a total of 18 projects with an approximate total investment of USD 4.4 billion. Furthermore, he spearheaded significant initiatives aimed at optimizing Public-Private Partnership (APP) processes.

## Shannon Bolton

Partner, StepStone Group (Dallas)



Ms. Bolton is member of the business development team, focusing her efforts in the US as well as overseeing client relationships in the Andean region. Prior to joining StepStone, Ms. Bolton was the director at Capital Strategies Partners, a third-party marketer and placement agency. Before that, she worked in institutional sales at LarrainVial SA, Chile's largest investment bank. Ms. Bolton received a BS in business administration from Boston University.

## Salvador Almeida

Head of LatAm, Hamilton Lane (Miami)



Salvador is Hamilton Lane's Head of LatAm. Salvador is a Principal and Director in our Client Solutions team where he is responsible for leading Business Development and Relationship Management for Latin American clients. Prior to joining Hamilton Lane in July 2014, Salvador was an Investment Manager at Haitong Investment Bank in São Paulo, where he focused on origination, structuring and executing Debt & Equity Capital Markets and M&A transactions. Salvador began his career as an M&A analyst in Lisbon for Haitong Investment Bank. Salvador received a master's degree in Business Administration with focus in Corporate Finance and a B.A. from Nova School of Business and Economics, in Lisbon, Portugal. Also attended an intensive Finance Course from LSE in London and a Negotiation course with Harvard Business School.





## Thomas Verbeken

Head of Real Estate Investments, Inversiones Marchigue (Chile)

Thomas Verbeken is Head of Real Estate at Inversiones Marchigue, a Chilean family office with important focus on real estate investments. In this position, he is responsible for the co-investment, analysis and profitability valuation for all real estate asset classes such as development of residential and commercial real estate, direct real estate equity investment for rent and RE Investments funds (both local and international), which includes direct relationship with General Partners. Previously, Thomas has worked in MetLife Insurance Company on the Real Estate Investment production team and as Head of RE Risk for more than 8 years, and has worked in development area of the regional developer Parque Arauco. Thomas has Business Administration in Universidad Católica de Chile and a Master in Arts in International Business Finance in Bournemouth University, UK. Thomas is also teacher on ESE Business School on different Real Estate programs.



## Pablo Massera

Real Estate Manager, Fynsa (Chile)

Mr. Massera holds an Industrial Engineering degree from Universidad Adolfo Ibáñez, and a master's degree in Applied Finance from Macquarie University. He joined Fynsa in 2019. As manager of the area, he oversees the development of Real Estate initiatives in which Fynsa is present. He takes part in the investment and management committees of Real Estate Investment Funds, and he is also a board member of several Development Companies. Previously, he was responsible for leading the real estate development and operations of the main senior residences company in Chile. He was also involved in the management and consulting for the development of mixed-used real estate projects. Earlier, he worked in financial institutions, such as LarraínVial, HSBC and Citibank. Mr. Massera has more than 25 years of experience in different sectors.



## Consuelo Artigas Muñoz

Head of Alternatives, Bice Vida LIC (Santiago)

Ms Artigas is the head of Bice Vida's Alternative Investments team. Consuelo is part of the life insurance company's investment team, where she is responsible for managing investments in private equity, private credit and infrastructure in Chile and abroad. Prior to joining Bice Vida in November 2012, Consuelo obtained a Master's Degree in Business Administration from the Pontificia Universidad Católica de Chile. She also attended an advanced course on alternative investments at the London Business School and received a diploma from the Universidad Adolfo Ibáñez for successfully completing a course on financial derivatives.



## Peter Lipson

Managing Director, HarbourVest (Boston)

Peter Lipson focuses on private credit, global direct co-investments as well as primary and secondary investments in Latin America. Peter serves as the Chair of the Firm's Credit Investment Committee. He joined HarbourVest in 1997 as an associate focused on direct investments in operating companies and rejoined the Firm's direct investment team in 2001 after receiving his MBA. Peter was instrumental in establishing HarbourVest's presence in Bogotá including building relationships with institutional investors and general partners in the region. Peter serves as a director of Lytx, HilCo Vision and TownePark. Before joining HarbourVest, he worked as a financial analyst in the Mergers & Acquisitions Group at Salomon Brothers. Peter received a BA in Economics from the University of California, San Diego in 1993, an MS in Information Systems from the University of Virginia in 1995, and an MBA from Harvard Business School in 2001.



## Juan Eduardo Fantini Pérez-Villamil, CAIA

Partner & CIO, CIO Investment Office, Colunquen (Boston)

Before CIO investment office, he was Chief Investment Officer at Colunquén, a single-family office based in Chile. He worked more than 10 years at EuroAmerica, a financial group with presence in life insurance, asset management, financing and brokerage businesses. He was responsible for the international brokerage business for private clients, the Pershing platform and for the development of the brokerage business in the Mercado Integrado Latinoamericano (MILA). He has been portfolio manager for the international mutual funds at EuroAmerica. He is an actual member of the overseeing committees of several private market funds. He is a Chartered Alternative Investment Analyst and has completed several alternative assets programs such as the Private Equity Investment Certification at ILPA, the Stewardship Certificate from the Commonfund Institute and the Masterclass in Private Equity Certificate from the London Business School. He holds a BSc in Management and a MSc in Finance from Universidad de Chile. He also attended the Global Executive Academy at MIT.



## Cristobal Larrain

Associate Director, Alternative Assets, Provida AFP (Chile)

Cristóbal is Associate Director of the Alternative Assets team in Provida AFP, one of the pension funds with the longest history of investments in Alternative Assets in Chile (going back to the 90'). The team is in charge of an AUM of almost USD 10 billion in Private Equity, Private Credit, Real Assets, and co-investments in Chile and abroad. Before joining the Alternative Assets team, Cristóbal was a lawyer specialized in M&A, finance, and investment law. Cristóbal obtained his law degree from the Universidad de Chile, an MBA from Pontificia Universidad Católica de Chile, and an LLM from the University of Nottingham (UK).



## Daniel Savage

Vice President, Investments & Strategy, Peachtree Group (Atlanta)

Daniel Savage is Vice President, Investments & Strategy at Peachtree Group. He is responsible for developing capital formation strategies with institutional capital partners and serves as a liaison between Peachtree Group's internal broker-dealer (PPCI) division and Peachtree's investment teams. Before joining Peachtree, he served as Vice President, Investor Relations for Cohen Investment Group, where he was responsible for raising private equity from accredited investors and institutions for their direct real estate investment offerings. Prior to that, Daniel worked for Glenview Capital Management, LLC, a New York, NY-based hedge fund. Daniel received his Bachelor of Science in Finance with a specialization in financial risk management from Virginia Tech and completed coursework at The London School of Economics and Political Science.



## Brant Brown

President and COO, Westmount Realty Capital (Dallas)

Brant Brown serves as President & COO of Westmount Realty Capital, a Dallas-based, privately held, commercial real estate firm that has consistently created value through multiple market cycles by employing an industry leading approach to investment opportunities. Brant brings extensive investment and operational experience, with an astute background in finance and a solid track record of leadership with institutional real estate and private equity firms. Focused on mapping Westmount's growth execution strategy, Brant leads various business lines in the areas of acquisitions, asset management, structured finance and accounting, capital markets, investor relations, information technology, corporate governance, and planning. Since 2015, Brant has grown the firm's headcount significantly, building a solid pipeline of talented leaders. Westmount is now positioned as a driving force in critical markets in the Midwest, Southwest, and Southeast regions. Brant's previous in-depth financial analysis and governance for more than \$30 billion in institutional real estate and fixed income investments serves him well as the chair of Westmount's operating committee as well as a member of Westmount's investment committee. Brant earned his master's degree in business from Southern Methodist University, an undergraduate degree in accounting from the University of Kansas and is a licensed CPA in the state of Texas.



## Albert Kwon

Chief Investment Officer, 4 Life Seguros de Vida (Santiago)

With an extensive 18-year career, Albert Kwon currently holds the position of Chief Investment Manager at 4Life Seguros de Vida. He graduated with a degree in Industrial Civil Engineering from the Universidad de Chile and completed an MBA program at Universidad Adolfo Ibañez. His expertise spans various sectors, including Pension Funds (AFP), Banking, Asset Management, and Life Insurance. Notably, he played a pivotal role in the establishment of BTG Pactual Seguros de Vida in 2015 and skillfully managed the transition of the investment department during the merger from BTG Seguros de Vida to 4 Life Seguros de Vida in 2020. Albert's prior experience as a LatAm Portfolio Manager at Celfin Capital allowed him to hone his investment management skills. Today, he excels in overseeing the Life Insurance investment portfolio, adhering to new policies and local regulations, and actively seeking investment opportunities both in Chile and abroad. His focus remains on diverse asset classes, with a strong emphasis on alternative investments.



## Rafael Ariztia

Partner, Executive Director, MFO (Santiago)

Comenzó su actividad profesional el año 2002 como CFO de Bancard, donde estuvo más de 4 años. Posteriormente realizó un MBA en Harvard Business School. En 2008, ingresó a Celfin Capital como Gerente de Fondos Inmobiliarios, para luego asumir en 2009, como Gerente de Inversiones y Gerente General de Celfin Administración de Activos, teniendo entre sus responsabilidades las estrategias de inversión y “asset allocation” para los fondos de inversión y clientes. Entre los años 2011 y 2014 se desempeñó en el Gobierno, como Coordinador Ejecutivo de Modernización del Estado, dependiente del Ministerio Secretaría General de la Presidencia, desde donde lideró la creación de la red ChileAtiende, entre otras iniciativas. Posteriormente, entre 2018 y 2020, fue asesor del Presidente de la República y jefe del equipo de políticas públicas de la Asesoría Presidencial en La Moneda, además de encargado presidencial para la modernización del Estado. Ha sido columnista de Diario Financiero y T13 Radio. Socio de MFO Advisors desde 2013.)



## Francisco Valdes

Chief Investment Officer, Olivo Capital (Chile)



## Chris Lund

Managing Director and Co-Portfolio Manager, Institutional Portfolios, Monroe Capital (Chicago)

Chris Lund, Managing Director and Co-Portfolio Manager, Institutional Portfolios. Mr. Lund is a Managing Director and Co-Portfolio Manager of Monroe Capital's institutional portfolios. He is responsible for managing the firm's direct investing vehicles including commingled funds, separately managed accounts, and SBIC funds. He joined the firm in 2015 and is a member of Monroe's Investment Committee. He also is responsible for the firm's ESG initiatives within the investment process. Mr. Lund serves as the Co-Chair of the firm's Strategic Planning Committee. Mr. Lund is the firm's subject matter expert on Healthcare investments. He previously served as an underwriter with a focus on the firm's healthcare investments. Mr. Lund has over 15 years of experience in credit investing. Prior to joining Monroe, Mr. Lund invested in debt and equity securities at Bain Capital Credit. Mr. Lund earned his B.B.A. in Accountancy from the University of Notre Dame.



## Alexandra Budge

Portfolio Manager, AFP Habitat (Chile)

Alexandra Budge is a CFA charter holder with a BSc in Commercial Engineering/Business Administration, majoring in Finance and Investment. Currently serving as the Head of Private Equity and private debt at AFP Habitat, Chile's largest pension plan, she has been covering private equity and private debt investments since 2014.



## Luis Raúl Solá

Chief Operating Officer, Chief Financial Officer, Kingbird Investment Management (Boston)

Mr. Solá has over 30 years of experience in public accounting, finance and operations management. For the past 20 years, he has led and managed the operations of various business units for Grupo Ferré Rangel, specifically spearheading real estate portfolio operations, financial reporting and accounting. In this capacity, he provided leadership to position the subsidiaries at the forefront of their industries and markets. Mr. Solá developed strategic plans to advance and meet each respective company's growth objectives, including real estate development, property management, and asset management, while successfully driving revenue, and profitability. Mr. Solá joined Grupo Ferré Rangel in 1996, where he served as Director of Internal Audit for five years. He previously was a Senior Auditor with Price Waterhouse and an accountant with Procter & Gamble. As the Chief Financial Officer of Kingbird Investment Management, Mr. Solá is responsible for all financial functions including financial forecasting and budgets, tracking of financial goals and objectives, cash management and monitoring cash flow. Mr. Solá advises on long-term business and financial planning for business growth, assesses financial risk and opportunities, and oversees the preparation of financial reporting. He collaborates with investor relations and reporting. As the Chief Operating Officer of Kingbird Investment Management, Mr. Solá is responsible for the ongoing business operations, portfolio oversight and asset management functions. He oversees the financial operations, debt placement, accounting, tax, budgetary, treasury and implementation of financial and risk management strategies. Mr. Solá is a key participant in execution of investment acquisitions and dispositions. Mr. Solá is a Certified Public Accountant and is a member of the American Institute of Certified Public Accountants and the Puerto Rico Society of Certified Public Accountants. Mr. Solá is a Certified Commercial Investment Member (CCIM), member of the CCIM Institute and a past President of the Puerto Rico CCIM Chapter. He is a Certified Property Manager candidate. He holds a BA in Business Administration, with concentration in Accounting, from the University of Puerto Rico. He is a member of the Urban Land Institute, the Institute of Real Estate Management (IREM), and the Puerto Rico Builders Association. He served on the board of directors of Big Brothers Big Sisters of America for five years.



## Juan Pablo Correa

Head of Private Equity Investments, AFP Capital (Chile)

As Head of Private Equity Investment at AFP Capital, Juan Pablo is responsible for the Pension Funds' private equity portfolio, which has more than \$1 billion in AUM, making annual commitments in various segments of the Private Equity space, such as buyout, growth equity, venture capital, secondaries and co-investments. Before joining AFP Capital, Juan Pablo was a Portfolio Manager at Capital Advisors, overseeing the private equity Funds 'Capital Advisors Fundación Parques Cementerios' and 'Capital Advisors Renta Hotelera I & II'. These funds invested in real estate assets and in asset-backed private equity businesses, such as cemetery parks and hotel operations and development. While working at Capital Advisors, Juan Pablo served as a board member of Grupo Nuestros Parques and as a member of the executive committee of Atton Hoteles, leading the latter's sale to Accor Hotels and A3 Property Investments. Juan Pablo has an MBA from the London Business School, with concentrations in Private Equity and Finance. He is also an Industrial Civil Engineer with a Diploma in Transportation Engineering from the Pontificia Universidad Católica de Chile.





## Coleman Andrews

CEO, RMWC, Co-founder, Bain Capital (New York)

Coleman is the Founder, Chief Executive Officer, and Co-Owner of RMWC. RMWC's strategies benefit from Coleman's diverse experience at Bain Capital and Bain & Company, his prior experience as CEO of two global companies, and his observations gained, and lessons learned through several economic and market cycles. Coleman is a member of the Board of Directors of the DAPER Investment Fund, a co-investment fund of the Stanford Management Company, the entity which directs the investment of approximately \$40 + billion of endowment and related funds for Stanford University. Coleman served for 15 years as a global advisor to Trilantic Capital Partners, a private equity firm managing \$6.0 billion of assets. Coleman was Co-Founding Partner of Bain Capital and a Partner of Bain & Company. He holds an M.B.A. from Stanford University, where he was named an Arjay Miller Scholar, and holds a B.A. from Dartmouth College, High Honors in Economics, magna cum laude, where he was a Rufus Choate Scholar.



## Ana Zarruk

Managing Director, Head of LatAm, Pantheon (Bogota)

Ana is a member of Pantheon's Emerging Markets Investment Team, where she focuses on the analysis, evaluation and completion of Latin American investment opportunities. She is also a member of the Investor Relations Team servicing Latin American institutional investors. Ana is a member of Pantheon's Emerging Markets Investment Committee and Inclusion and Diversity Committee. In addition, Ana is a member of the GPCA Latin America Council. Prior to joining Pantheon, she was an investment professional at Tribeca Asset Management and Corficolombiana, Colombia's largest financial corporation. She has also worked in short projects at Credit Suisse's Financial Sponsors Group, Actis, and LPEQ (now LPeC), the listed private market advocacy based in London. Ana graduated Magna Cum Laude with a BSc in Industrial Engineering from Universidad de los Andes in Bogotá and holds an MBA from London Business School. She is fluent in English, Spanish, Portuguese and Italian, and is based in Bogotá.



## Aryn Hassanally

Partner, Global Head of Private Equity Secondaries, Pantheon (New York)

Aryn is a Partner and Global Head of Private Equity Secondaries. Prior to joining Pantheon Aryn was an Investment Partner at Collier Capital, where he worked for 17 years in both London and New York and was formerly the global Co-Head of Investment Execution. Prior to joining Collier, he practiced corporate law, focusing on private equity transactions and fund structuring. Aryn holds a bachelor's degree in Politics from Brandeis University and a JD in Law from the Duke University School of Law, and is based in New York.



## Raudel Yanez

Managing Director, Kline Hill Partners (Greenwich)

Raudel Yanez is a Managing Director at Kline Hill, focused on GP-led transactions in North America. Prior to joining Kline Hill in April 2022, Mr. Yanez was a Director at Spring Bridge Partners (now part of Ares), where he was one of the first members of the team and focused on middle-market secondaries. Before that, he was an Investment Manager at Collier Capital where he led teams in the evaluation, due diligence, and execution of secondary private equity investments in the US and Latin America. Mr. Yanez also worked at Morgan Stanley in mergers and acquisitions. Mr. Yanez holds an A.B. from Harvard College and an M.B.A. from the Stanford Graduate School of Business.



## Sergio Aratangy

Head of Financial Division, Pension Superintendence (Santiago)

Mr. Aratangy, has joined the Chilean Pension Funds Superintendence in February 2018. Studied Economics in Universidade de São Paulo, Brazil and has a Master in Applied Economics in Universidad de Chile. Mr Aratangy is Brazilian, living in Chile since 2002, he has an extense experience in the Latin American Financial Markets. Mr. Aratangy started his career as Analyst in Rosenberg & Asociados in 1989. In Chile, he was a key part of Larrain Vial's Latin American Assets team since 2006, being awarded 4 times as Portfolio Manager. From 2012 to 2016 he performed as the CEO of EuroAmerica Administradora General de Fondos, a Chilean Asset Management Company. Prior to joining the Superintendence, he was on the Board of some private companies. As Head of Financial Division, he was part of the Chilean Green Agreement and is part of the group developing the Chilean Taxonomy for Green Finance.



## Enrique Victor Santibanez Gomez

Head of Distribution, FYNOSA (Chile)

Enrique Santibáñez is Head of Wholesale & Institutional Distribution at Fynsa. He is responsible for developing distribution effort towards institutional clients, financial intermediaries, and family offices, in Chile and the rest of Latam. In addition, he fulfills the role of director at Fynsa AGF and actively supports the development of the platform of its own and third-party products. Enrique has over 20 years of experience in the financial industry, always linked to the institutional investor. At the beginning he worked at AFP ProVida, in several investment roles. Then, he continued at Compass Group, refocusing his career towards business-oriented roles, always with an institutional bias. Before joining Fynsa, Enrique was the Head of Institutional Distribution at BICE Inversiones and Inversiones Security, leading the development of institutional efforts in both, achieving agreements with well-recognized international asset managers, development of several products with institutional demand, customized mandates with institutional investors, international distribution capabilities, among others.



## Nic DiLoretta

Managing Director, Head of Real Assets, Aksia (San Diego)

Nic has over 16 years of experience in alternative assets with a focus in real assets investments. He assists in the management of the teams responsible for sourcing, conducting due diligence, and evaluating investments for real assets primaries and co-investments. Nic helped to design and is an instructor for ILPA's "Real Assets for the Limited Partner", a one day, deep-dive seminar offered to ILPA members. Prior to Aksia's acquisition of TorreyCove Capital Partners, Nic was a Senior Vice President, joining the firm in 2011. Prior to that, Nic was an Associate at PCG Asset Management, where he supported the Risk Management department and assisted in the due diligence of private equity investments. Nic graduated from the University of San Diego with a BBA and holds an MBA from the Marshall School of Business at the University of Southern California. In 2019 and 2020, Nic was recognized as a Knowledge Brokers "New Guard" and Knowledge Broker, respectively, by Chief Investment Officer.



## Andrés Jablonski Arellano

Head of Research and Alternative Assets, AFC Chile (Chile)

Andrés Jablonski is the Head of Research and Alternative Assets at AFC Chile and also serves as the Deputy Investment Manager for a private, yet government-regulated, unemployment fund. Andrés played a key role in designing and implementing the alternative investment plan, marking a new direction for the organization. With a robust background in mathematical engineering, he effectively utilizes quantitative tools to enhance data analysis and research capabilities. He has also significantly contributed to the asset allocation processes using quantitative metrics to forecast asset classes. Additionally, he played a key role in the design of the investment policy for alternative assets and holds a master's degree in financial economics, a diploma in alternative investment, and several courses from the ILPA Institute.



## Alvaro Cepeda

Head of Alternative Assets, BICE Inversiones (Chile)

Alvaro Cepeda is the leads the efforts in Alternative Investments at BICE Inversiones, the Asset and Wealth management division of the BICE Group. His role includes structuring alternative funds (credit, real estate and infrastructure), as well as supporting the distribution team and Wealth Management regarding Alternative funds. Prior to his current role, he was at BICE Vida, the life insurance company of the group, where he managed investments in Fixed Income and then lead the Alternative Asset portfolio. Prior he worked as an Investment Analyst covering Latin American issuers in Equity and Fixed Income. Alvaro has a Economics degree from the Universidad de Chile and participated in Private Equity Masterclass in both London Business School and Harvard University.



## Siddique Haq

Principal, TopTier Capital Partners (Boston)

Siddique is a Principal and member of the Investor Relations team. He is responsible for product strategy, capital formation and marketing efforts. Siddique has experience as a business development professional raising capital, supporting client needs and sourcing investment opportunities. He has also served as a trusted advisor to institutional investors allocating capital to private market investments. Prior to joining Top Tier, he worked in business development at MC Credit Partners for five years. Before that he spent eight years at NEPC focused on private market investments for a broad range of investment clients.



## Francisco Meneses

Head of Investments, Corfo (Chile)

Economist from the Catholic University of Chile, MPA/ID from the Harvard and PhD. in Public Policy from Duke University. Has worked at the Ministry of Education of Chile, the Central Bank of Chile, and the World Bank. Currently the CIO of CORFO, the Chilean Development Agency. At CORFO he oversees an exposition of US\$ 3.1bn, lead the creation of a Green Hydrogen Facility (US\$ 1bn) funded with credits from four multilateral Bank (World Bank, IADB, KFW and EIB). Lead "Venture Capital Chile", a new venture capital program from CORFO (US\$ 1bn) and the creation of two new segments in the Santiago Stock Exchange, called ScaleX, focused on Start-up and Scale-up firms.



## Juan Andres Larrondo

Partner, HD Legal (Chile)

Lawyer from Universidad de Los Andes, Master in Taxation from Georgetown University Law Center (Washington, D.C.), and Master in Taxes from the Faculty of Economics and Business of Universidad de Chile. Juan Andrés knowledge and experience focuses on tax, corporate and family businesses matters, providing legal advice in such areas, including national, international, VAT/Income Tax, and hereditary tax planning and consulting. Throughout his professional career, he has participated providing tax counseling in projects related to corporate, M&A, financial, private equity and stock market, among others, as well as business reorganizations, tax compliance and all kind of tax planning. He also represents Chilean and foreign clients before the Chilean Internal Revenue Service and the Tax and Customs Courts. Previously (2011-2015) he worked as an associate lawyer in the tax and corporate areas in the law firm Del Rio & Compañía, advising clients both at corporate and personal / family level



## Chase Chehade

Senior Vice President, Paramount Group (New York)

Mr Chehade joined Paramount Group in May 2022 as Senior Vice President tasked with spearheading the company's global fundraising efforts. Chehade held the same position with Thor Equities since 2019 where he was responsible for the placement of equity for commercial real estate funds, separate accounts and one-off transactions in the United States, Europe and Mexico; he also served on the firm's executive and investment committees. Mr Chehade previously spent 5 years as Soho Properties' Head of Acquisitions and Capital Markets in addition to 6 years at the investment banks Carlton Group and Greenwich Group where he focused on cross border investments from the Middle East and East Asia. Mr Chehade graduated with honors from New York University with an M.S. in Real Estate and from University of Georgia with a B.B.A in Finance.



## Sebastián Echeverría

Portfolio Manager & CIO, CIO Investment Office, Colunquen (Chile)

Sebastián Echeverría focuses on primary and secondary investments mainly in buyout, growth equity, and private credit. Sebastián has been a key member in the transition from being a single-family office to an outsourced chief investment officer (OCIO), in the development of the global network of GPs, and investments capabilities, having lead investments in excess of USD 500m. He started his career in CIO | Colunquén Investment Office in 2019. Sebastian obtained a Master's Degree in Economics from Universidad de Chile. He is a Chartered Alternative Investment Analyst (CAIA) and has completed several alternative assets programs such as the Private Equity Investments Certification at ILPA, and the Masterclass in Private Equity in London Business School.



## Paulina Nucamendi

Head of International Alternatives, AFP Cuprum (Chile)

Paulina is responsible for the international private markets portfolio of AFP Cuprum covering Private equity, Private debt, Infrastructure and Real Estate. She has worked in the private markets for 6+ years. She previously worked in Research for Itaú Asset Management covering the Andean region and in Citibank Mexico both in the Afore and in Corporate Banking. She is a CFA and CAIA Charterholder. She holds a Bachelor's degree in Actuarial Science from the Instituto Tecnológico Autónomo de México (ITAM).





## Ben Moe

Managing Partner, Osceola Capital Management (Florida)

Ben oversees all aspects of the firm's investment activities including origination, evaluation, and execution of investments. As a member of the Investment Committee, he serves on the boards of several Osceola portfolio companies including Central Medical Supply Group, Forward Solutions, Industry Services Co., PayrHealth, Quote.com, Revelation Pharma, and Tendit Group. Ben has completed over 65 M&A transactions to date across a wide variety of industries. Previously, Ben served as CEO of Avesta Asset Management, a private equity firm focused on value-add multifamily real estate investments. Before Avesta, he was CFO of Advantage Waypoint, an outsourced business services company, where he helped lead the acquisition of 24 businesses before an eventual sale to Apax Partners. Ben also spent six years in the investment banking groups of Bear Stearns and Raymond James and five years as a United States Air Force officer and hospital administrator. Ben earned an MBA from Duke University and a BS with Distinguished Graduate designation from the United States Air Force Academy. Ben lives in Tampa with his wife and two sons and enjoys fishing and snowboarding.



## Nicola Rosenstock

Counsel, Ropes & Gray (New York)

Nicola Rosenstock serves as counsel in the asset management group in New York. Nicola focuses her practice on the representation of institutional investors in their investments in the full range of private funds. Nicola also has experience representing sponsors of private funds with respect to formation, governance and compliance matters. She has a broad-based investment funds practice with comprehensive experience with private, venture capital, credit, real estate and hedge funds. Clients turn to Nicola for her practical, commercial and candid advice. Chambers USA (2021) recognizes Nicola nationally as an "up and coming" practitioner in the area of Investment Funds: Investor Representation, where a client commends her for being "very knowledgeable of this market" and another adds, "she was responsive, helpful, and has broad and deep knowledge of related issues." Nicola routinely represents significant institutional investors in connection with primary investments and co-investments, as well as with the purchase and sale of private fund interests via secondary transactions. She has negotiated private fund investments on behalf of foundations, insurance companies, funds of funds, banks, sovereign wealth funds, pension plans and family offices. Prior to joining Ropes & Gray in 2022, Nicola was counsel in the asset management practice of another global law firm in New York.



## Rodrigo Martinez Serrano

Head of Alternative Investments, PentaVida (Chile)

Head of Penta Vida's Alternative Investments team comprised by Private Equity, Private Debt, Real Estate & Infrastructure, responsible for the analysis, due diligence and manage the alternatives portfolio of the fourth life insurance company in the country with commitments near USD 1 billion. I started my career as a consultant in Deloitte and joined Penta Vida in 2016 and worked there since.



## Greg Wallem

Managing Director, StepStone Group (La Jolla)

Mr. Wallem is a member of the private equity team, focusing on US-based middle-market, venture capital, and growth equity managers. Prior to joining the research team, Mr. Wallem was an associate on the monitoring and reporting team at StepStone. Mr. Wallem received his BA from Westmont College and is a CFA charterholder.



## María Jesús Ibañez

Principal Associate, Philippi Prietocarrizosa Ferrero DU & Uría (Santiago)

Maria has 10 years of experience in designing both inbound and outbound investment structures. Her area of specialization is international tax law, and it is within such a context that she has counselled clients not only in inbound/outbound investment structuring but also in international reorganizations and financing structuring. She not only has experience in Chile, but also in the US, where she worked as an Inbound International Tax Consultant for Deloitte LLP. She also holds an LL.M. from the University of Chicago.



## Pablo Moya

VP de Equities y Alternative Assets, Confuturo Life Insurance Co, (Santiago)

Head of Confuturo's Alternative portfolio, comprised by Private Equity, Private Debt, Real Estate & Infrastructure, with a current commitment of 1 billion USD. I am also responsible of the public equities portfolio, divided in international and local equities. I have a B&A degree in Ponticia Universidad Católica de Chile and i've participated in Advance Private Equity courses at Wharton School.



# PRE-EVENT NETWORKING COCKTAIL

Wednesday, November 29th

6:30pm – 9:30pm ET

Location: Mestizo

Av. Bicentenario 4050, Vitacura , Santiago

Reservas 56974776093 / 56968437146

Sponsored By:

**fynsa**

H •  
• D  
LEGAL



# AGENDA OUTLINE

7:30 AM CLT

## Registration & Breakfast Networking

Sponsored by:



8:30 AM CLT

## Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

8:30 AM CLT

## Presentation: Pension Superintendence Outlook on Alternative Investments

Speaker:

Sergio Aratangy, Head of Financial Division, Pension Superintendence

8:50 AM CLT

## Chilean Pension Perspectives

Leading Chilean Pension Funds discuss their interest in Private Equity, Infrastructure, Private Debt & Real Estate Allocation globally. How do they use primaries, secondaries and co-investments to optimize their portfolios?

Moderator:

Shannon Bolton, Partner, StepStone Group

Keynote Speakers:

Cristobal Larrain, Associate Director, Alternative Assets, Provida AFP

Alexandra Budge, Portfolio Manager, AFP Habitat

Andrés Jablonski Arellano, Head of Research and Alternative Assets, AFC Chile

Juan Pablo Correa, Head of Private Equity Investments, AFP Capital

Paulina Nucamendi, Head of International Alternatives, AFP Cuprum

10:00 AM CLT

## AM Networking Break

Sponsored By:





# AGENDA OUTLINE

10:30 AM CLT

## Private Credit: The Golden Era

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

Moderator:

Alvaro Cepeda, Head of Alternative Assets, BICE Inversiones

Panelists:

Peter Lipson, Managing Director, HarbourVest Partner

Chris Lund, Managing Director and Co-Portfolio Manager, Institutional Portfolios, Monroe Capital

Coleman Andrews, CEO, RMWC, Co-founder, Bain Capital

11:20 AM CLT

## CAF Asset Management

An alternative for mobilizing private wealth to close the infrastructure gap.

Presenter:

Alberto Ñecco, CEO, CAF Asset Management



11:40 AM CLT

## Private Equity, Middle Market, & Secondaries

On this session leading institutional investors and fund managers talk about their private equity investment 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:

Sebastián Echeverría, Portfolio Manager & CIO, CIO Investment Office, Colunquen

Panelists:

Raudel Yanez, Managing Director, Kline Hill Partners

Amyr Hassanally, Partner, Global Head of Private Equity Secondaries, Pantheon

Ben Moe, Managing Partner, Osceola Capital Management



# AGENDA OUTLINE

12:30 PM CLT

## Networking Luncheon

Sponsored by:



1:45 PM CLT

## Presentation: The State of Infrastructure and Energy

Presenter:

Nic DiLoretta, Managing Director, Head of Real Assets, Aksia

2:00 PM CLT

## The State of US Real Estate

Leading US real estate investment firms discuss the current investment climate amidst higher interest rates.

Moderator:

Pablo Massera, Real Estate Manager, Fynsa

Panelists:

Daniel Savage, Vice President, Investments & Strategy, Peachtree Group

Brant Brown, President and COO, Westmount Realty Capital

Chase Chegade, Senior Vice President, Paramount Group

3:00 PM CLT

## PM Networking Break

Sponsored by:





# AGENDA OUTLINE

3:30 PM CLT

## Legal & Tax Considerations for Investing Abroad

On this session experts discuss what are the key legal and tax considerations for private and institutional clients in Chile.

Moderator:

Nicola Rosenstock, Counsel, Ropes & Gray

Panelists:

Luis Raúl Solá, Chief Operating Officer, Chief Financial Officer, Kingbird Investment Management

Juan Andres Larrondo, Partner, HD Legal

María Jesús Ibañez, Principal Associate, Philippi Prietocarrizosa Ferrero DU & Uría

4:00 PM CLT

## LP & GP Perspectives on Growth & Venture

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

Moderator:

Ana Zarruk, Head of Latam, Pantheon

Panelists:

Siddique Haq, Principal, TopTier Capital Partners

Francisco Meneses, Head of Investments, Corfo

Greg Wallem, Managing Director, StepStone Group

# AGENDA OUTLINE

4:30 PM CLT

## Chilean Family Office Perspectives

Chilean family offices discuss their allocation strategy for the private markets globally. How has local political uncertainty impacted appetite to diversify outside of Chile. What appetite do they have for direct vs. indirect investment? What are the main themes that drive family investment decision making?

Moderator:

Salvador Almeida, Head of LatAm, Hamilton Lane

Panelists:

Thomas Verbeken, Head of Real Estate Investments, Inversiones Marchigue

Francisco Valdes, Chief Investment Officer, Olivo Capital

Juan Eduardo Fantini Pérez-Villamil, CAIA, Partner & CIO, CIO Investment Office, Colunquen

Rafael Ariztia, Partner, Executive Director, MFO

5:30 PM CLT

## Chilean Insurance LP Perspectives

Leading Insurance Investors discuss their interest in Private Equity, Infrastructure, Private Debt & Real Estate Allocation globally.

Moderator:

Enrique Victor Santibanez Gomez, Head of Distribution, FYNOSA

Panelists:

Consuelo Artigas, Head of Alternatives, Bice Vida LIC

Pablo Moya, VP de Equities y Alternative Assets, Confuturo Life Insurance Co,

Albert Kwon, Chief Investment Officer, 4 Life Seguros de Vida

Rodrigo Martinez Serrano, Head of Alternative Investments, PentaVida

6:30 PM CLT

## Cocktail Reception

Sponsored by:





# 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 October 13th**

~~Pre-Registration: \$2,000 USD~~ **Ends November 3rd**

**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.

**\$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.

**Roy Carmo Salsinha**

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

**Catherine Correia**

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

**Flavia Correia**

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

**Heriberto Acevedo**

Vice President  
T: +1 347 534 8508  
heriberto@carmocapital.com

**Erick Cruz**

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

**Renato Ferreira**

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

**Nicolás Rodríguez**

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

**Melissa Ribeiro**

Associate  
T: +1-516-726-4447  
melissa@carmocapital.com



THANK YOU

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

