



# The Sunbelt Real Estate Meeting

**Ritz-Carlton, Dallas, TX**

May 4<sup>th</sup> & 5<sup>th</sup>, 2022

LIVE AND IN-PERSON ONLY, NO VIRTUAL OPTION

CLOSED TO THE MEDIA



# The Sunbelt Real Estate Meeting

Ritz-Carlton, Dallas, TX– May 4<sup>th</sup> & 5<sup>th</sup>, 2022

---

## Table of Contents

Intro	3
By the Numbers	4
Covid Related Protocols	5
In Attendance	6
Institutional Sponsors	7
Sponsors	8-11
Speaker Bios	12-20
Conference Agenda	21-25
Participation Options	26-31
Carmo Contact Info	32

---



# The Sunbelt Real Estate Meeting

Ritz-Carlton, Dallas, TX– May 4<sup>th</sup> & 5<sup>th</sup>, 2022

Dear Colleague,

The rapid and continued growth in the U.S. Sunbelt has brought outsized commercial real estate investment opportunities to investors. The Sunbelt holds roughly 50 percent of the national population and has accounted for 75% of the total US population growth over the past decade. The region stretches across 18 states in the Southeast and Southwest. The boom is primarily driven by an exodus from high-tax to low tax-states. The Sunbelt has drawn attraction to both millennials in pursuit of a better quality of life as well as a safe haven for aging populations. This event was created to educate US based and international institutional and family office investors on investment opportunities within the sunbelt region. The conference will cover all asset classes including Industrial, Last-Mile Logistics, Multifamily, Single-Family Rental, Office, Self-Storage, Hospitality and Retail.

The event draws over 250 LP & GP participants. We look forward to hosting you and your team.

Best,

Roy Carmo Salsinha  
President, CEO  
Carmo Companies





# By the Numbers...

---

**\$3** Trillion AUM in attendance

**250** Total participants

**100** Institutional & Private Wealth Investors

**50** Private Equity Real Estate Funds

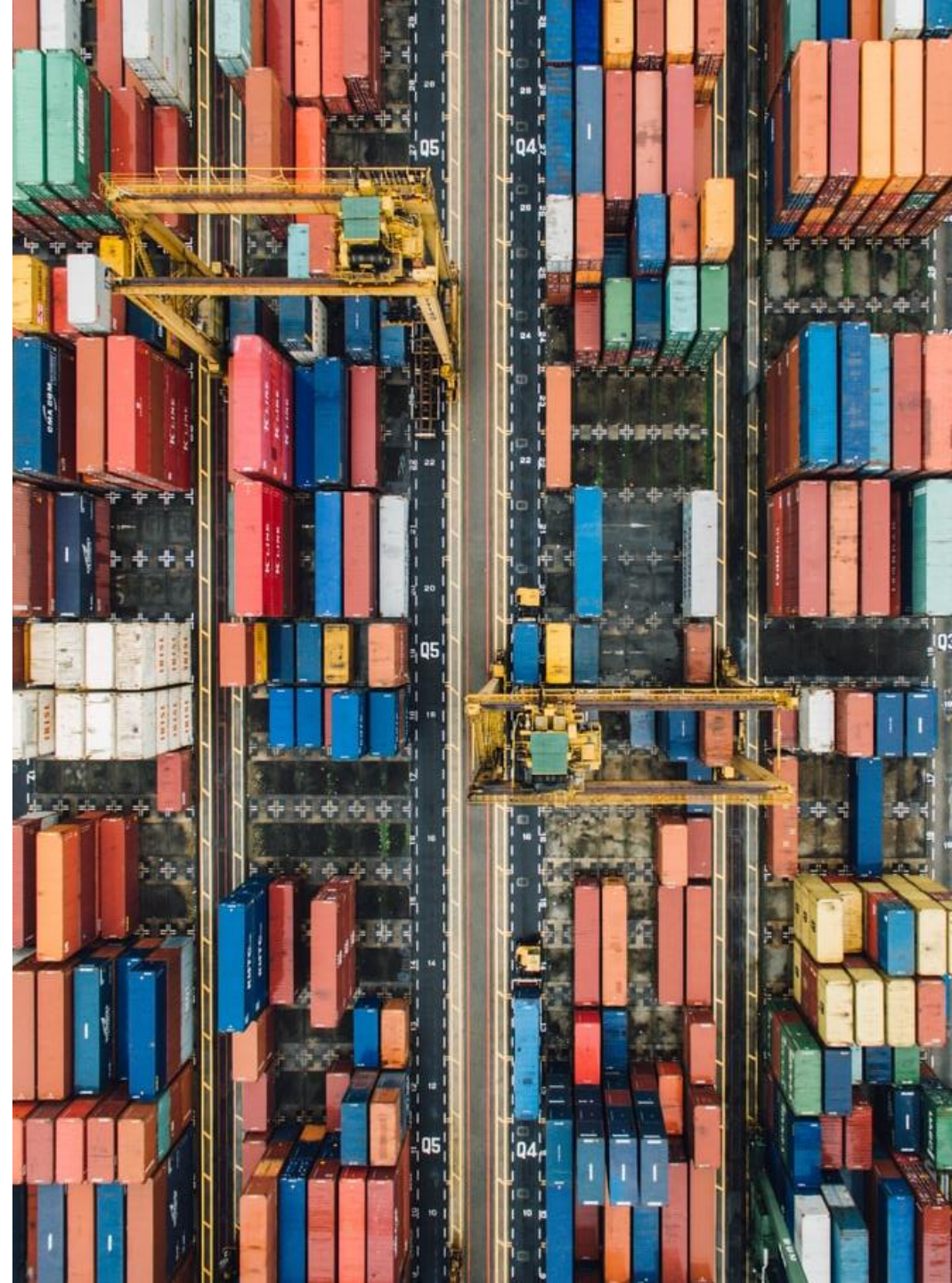
**50** Institutional Real Estate Developers

**50** Leading Real Estate Service Professionals

**6** Industry Exclusive Panel Sessions

**5** Hours of Open Networking/Round Table Discussions

**2** days





# Covid Related Protocols

---

The health and safety of our employees and attendees remain our top priority. We are working hard to make sure that we minimize risks related to the spread of COVID-19 to ensure a safe and comfortable experience for all guests. We will run in accordance with official government and local authority guidance, as well as any venue or location specific regulations.

- Modified room set up and seating arrangements
- Sanitation stations
- Limited touch food and beverage service

**Health & Safety Advisory:** *If you have a fever, cough, shortness of breath, feeling unwell or suspect to have symptoms of COVID-19, please seek medical attention and do not attend the event.*





## C-Level Executives

# In Attendance...

- US Focused Private Equity Real Estate Funds
- US Focused Real Estate Developers (Institutional Quality)
- Hedge Funds
- Tenants
- North American based Pension Funds
- North American based Endowments
- North American based Foundations
- North American based Fund of Funds
- Sovereign Wealth Funds
- US based Family Offices, Multifamily Offices and Private Banks
- Government officials
- Banks and Investment Banks
- Lawyers

# Institutional Partners



**ROBERT F.  
KENNEDY  
HUMAN  
RIGHTS**

**COMPASS  
INVESTORS**





# Sponsors

Founded in 2008, Atlantic Creek Real Estate Partners, LLC (“Atlantic Creek”) is a commercial real estate investment management firm with offices in New York, NY and Palm Beach, FL. Atlantic Creek targets “select opportunities” to acquire value-add or opportunistic, small and middle market multifamily, office, and other property types. The firm targets investments that exhibit a compelling basis with strong locational characteristics in high barrier-to-entry primary and secondary United States markets. Built on a foundation of commitment, discipline, and positive results, Atlantic Creek’s principals have in excess of 80 years of CRE experience and have contributed to over 250 CRE assignments totaling more than \$20 billion in estimated value, thereby gaining strong knowledge of a diversity of geographic locations, property types, and investment structures. By utilizing its network of relationships with owners, operators, and other capital market participants, Atlantic Creek pursues only those opportunities which are anticipated to provide the most attractive risk-adjusted returns.

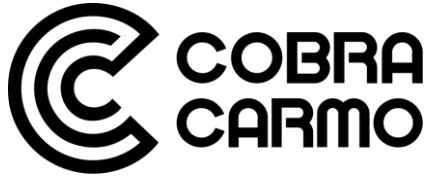
Berkeley Partners is a fully integrated principal investment firm focused exclusively on multi-tenant light industrial real estate. Founded in 2005, the company has sponsored a series of investment vehicles dedicated to the light industrial sector. With its national footprint, the company is one of the premier institutional industrial operators and fund managers.

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

Civitas Capital Group is a Dallas, Texas-based alternative asset firm that provides a range of products and services for institutional investors, family offices, and qualified individuals. The firm, which has more than \$1.7 billion of assets under management in more than 60 investments, focuses on compelling, niche investment strategies in U.S. real estate and lodging. Civitas was founded in 2009 by Daniel J. Healy and Rafael Anchia and has since attracted institutions and investors from 40+ countries. Civitas’ core values, ever-deepening cultural competency, and a sense of global citizenship define the firm’s purpose: to create opportunities that enrich communities, investors, and employees alike. For more information, visit [civitascapital.com](http://civitascapital.com).



# Sponsors



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.



DXD Capital is a commercial real estate private equity firm that uses proprietary technology in the self storage sector to select, acquire, and develop opportunities expected to outperform all competition. By using data to drive decisions and iterating on the technology at the core of its differentiation, the Company is creating efficiencies at a scale that the industry has not seen before. The first \$53M fund has a fully identified pipeline and three projects under construction and is currently raising its second fund. DXD Capital's best-in-class team has more than 150 years of combined real estate and construction experience, over 90 of them specializing on self storage specifically. Through commitment to excellence, a wide network of relationships with national reach, and proprietary technology, DXD expects to deliver the best returns in the sector to its investors.



Hartman has extensive experience acquiring, owning, managing, and leasing commercial office, retail, light industrial and warehouse properties located in Texas. The cornerstone of our investment strategy includes acquiring a portfolio of real estate properties that offer a blend of current and potential income based on in-place occupancy plus relatively significant potential for growth in income and value from re-tenanting, repositioning, and/or redevelopment. Since 1983, Hartman and its affiliated entities (including founder Allen R. Hartman) have sponsored 27 programs and acquired interests in more than 90 real assets totaling approximately \$800 million.



Highline Storage Partners is a values-focused real estate investor, developer, owner, and management company. We are a company dedicated to developing and repositioning distinct real estate assets throughout the southeast that continually provide our employees with the opportunity for growth and personal education. HSP's core strategy is to develop, acquire and reposition self storage assets primarily in secondary and tertiary markets. HSP's mission is a commitment to become the most innovative organization in the industry by identifying value and realizing unique opportunities in our properties, our people, and our communities. Highline Storage Partners is an affiliate of the McWane family's real estate company (Highline Real Estate Partners) and its operating company, McWane Inc. As a fourth-generation family run organization, McWane is one of the largest privately-held companies in the U.S. with more than 25 manufacturing facilities and over 6,000 employees around the globe.



# Sponsors

Humphreys Capital is a real estate investment company that acquires, develops and operates income-producing properties across multiple sectors including industrial and multifamily. The firm's investment and development focus is on dynamic, high-growth cities across the US, where it specializes in privately negotiated off-market, mid-size deals. The firm has raised more than \$620 million since inception across four funds.



March Capital Management ("MCM") is a woman- and minority-owned real estate investment and development firm headquartered in San Francisco. We focus on repositioning, developing and extracting the "highest and best use" out of underutilized properties in high growth, supply-constrained markets. Our goals are to create well-designed sustainable projects, support and revitalize communities, and deliver exceptional investment performance. As an established fund operator with deep market expertise and established relationships, we take an innovative and hands-on approach to management and execution. Bottom line—we're disciplined investors and problem solvers with a proven track record of success.



Mark IV Capital is a privately held real estate firm founded in 1974 and based in Newport Beach, California. The company acquires, develops and manages properties in the western United States with satellite offices in Roseville, California; Las Vegas, Nevada; Phoenix, Arizona; Denver, Colorado; and Austin, Texas. The Company has a long-term approach to real estate investing; seeking to grow both its portfolio and the associated cash flow by acting with integrity and building relationships with its tenants, vendors, and business partners. The company's core values of integrity, creativity, accountability, team orientation, development, and community are integral to Mark IV's success.



Headquartered in Germantown, Tennessee, McNeill Hotel Company is built on a foundation of trust, pursuit of excellence and making a difference in whatever we do. We espouse the philosophy of "people serving people" be it our guests, our investors, our team members, or our brand partners. Servant leadership truly defines our company culture. Phillip McNeill, Jr and Mark Ricketts, the company's founding principals, are 2nd generation hoteliers with over 60 years of combined experience in the hotel industry, encompassing nearly every discipline of the business. We focus on limited-service oriented hotels with a growth strategy based on a mix of new hotel development, meaningful acquisitions, and third-party management agreements.

# Sponsors



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



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



Prospect Capital Management L.P. ("Prospect"), founded in 1988, is a \$7.9 billion private debt and private equity manager. Prospect has a 34-year history managing private assets for investors with an emphasis on preserving capital and providing attractive current income and total returns. Prospect's investment strategies include real estate private equity, middle-market private equity, middle-market lending, and structured credit. Prospect targets sole, lead, and anchor investments and has a track record of success across multiple economic cycles. Prospect has had the same management team for 22 years. Prospect employs over 100 total professionals and is an SEC-registered investment adviser with an institutional-quality and Sarbanes-Oxley process compliant infrastructure.



SWBC Real Estate, LLC is a Dallas-based real estate company with its main focus on the development of multi-family properties through the state of Texas. To date, the SWBC Real Estate team has developed over \$750MM in multi-family properties, with a strong emphasis of suburban located properties within the 4 major markets of Texas. The firm is led by Terry W. Gwin, an industry veteran with more than 40 years of experience. With a diverse pool of talent, each member of the SWBC Real Estate team brings a unique background that provides the group with experience in virtually every segment of the industry, including development, leasing, investment sales, debt and equity financing and asset management. The team's broad-based history and experience translates into a competitive advantage for SWBC Real Estate and its portfolio of properties and investors. SWBC Real Estate is owned by SWBC Enterprises, Ltd. SWBC Enterprises, Ltd. is owned by Charlie Amato and Gary Dudley, co-founders of SWBC. SWBC is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and individuals. With offices across the country, SWBC is committed to providing quality products, outstanding service, and customized solutions in all 50 states. For more information, visit [www.swbc.com](http://www.swbc.com).





# Sponsors

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 30 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).

# Speakers

## Jonathan Bren

Founder, Bren Ventures (New York)

Jonathan Bren is the founder of Bren Ventures LLC, and has been an investor in hedge funds and real estate for the past 30 years. Jon worked for 2 different family office investors in the 1990s and 2000s investing in hedge funds and sponsoring and building hedge fund businesses. In addition, to investing in hedge funds, Jon also invested in several real estate deals and real estate businesses related to his family. In 2016 Jon worked for KBS, a commercial real estate investor, founded by his father, Peter Bren. Jon now works with some real estate investors and a real estate platform to provide capital markets solutions and create liquidity in specific real estate assets through equity recaps, secondary trades and exchanges in real estate interests, and direct investment. Jon is from Los Angeles, CA and lives in New York City, and travels between NYC and LA/Newport Beach often for business and family.

## Jamil McNeal

Director of Investments, True North Advisors (Dallas)

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

## Alex Abrams

Managing Director, StepStone Group (Miami)

Mr. Abrams is a member of the real estate investment team. Prior to joining StepStone, Mr. Abrams was a principal at GCM Grosvenor, where he focused on business development for its real estate primary funds and co-investment businesses (previously part of Credit Suisse as the Customized Fund Investment Group). Before that he was an associate attorney at Goodwin Procter and Orrick where he focused on private real estate investments and fund formation. Mr. Abrams received a JD from Boston College Law School and a BA from the University of Pennsylvania.

# Speakers

## T. Preston Herold

President, Hunt Southwest (Dallas)

Preston Herold is president of Hunt Southwest, a Dallas based commercial real estate development company, which is focused on industrial and cold storage development in the Texas market. Since April of 2015 when Preston was hired to start up Hunt Southwest, he has developed, is under construction on, or is in planning on approximately 9M SF of state-of-the-art distribution facilities in the Texas market. Prior to joining Hunt Southwest, Preston held the position of regional vice president with Industrial Income Trust and Industrial Property Trust, two national REITs focused on the industrial real estate sector. While there, he oversaw the central region for the REITs, which was made up of approximately 23M SF of industrial property from Texas to Chicago. Before becoming involved with the REITs, Preston served for over 12 years in management positions with Hillwood and Trammell Crow Company. Prior to Hillwood and Trammell Crow, Preston was the managing partner of a successful law practice. In addition to holding a real estate broker license, Preston has achieved the industry designation of Certified Commercial Investment Member (CCIM). He earned a Bachelor of Arts degree from Northwestern University, with a double major in economics and political science and also has a law degree from Southern Methodist University. Preston, a Dallas native, resides with his family in Dallas.

## Scott Wilson

Chief Underwriting Officer, The Beneficient Company Group (Dallas)

Scott Wilson is the Chief Underwriting Officer at The Beneficient Company Group, which provides a unique suite of simple, rapid, and cost-effective liquidity solutions and other financial services for owners of alternative assets. Mr. Wilson and his team are responsible leading the company's investment process and managing its collateral portfolio. He brings 20 years of experience, and prior to joining Beneficient in September 2018, Mr. Wilson was a Managing Director at Highland Capital Management, a global alternative asset manager where he was responsible for private equity investments totaling over \$1 billion in investment value, serving on several Boards of Directors, and for leading firm-wide strategy. Earlier in his career, he worked at McKinsey & Company, focusing on sales and marketing improvements with Fortune 500 clients and was also responsible for the internal training program for McKinsey's five Southern office locations. Mr. Wilson received his BS and his MBA from the Wharton School at the University of Pennsylvania.

## Scott Gosslee

Managing Director, ICP Group (Dallas)

Scott has a 25+ year career in global commercial real estate capital markets. For the past 6 years, Scott has served as the managing director of real estate for ICP Group. He is a member of the investment committee and responsibility for sourcing and underwriting new investment opportunities with best-in-class US real estate operators and ongoing portfolio management. ICP Group is an SEC registered multi-family office which raises capital from Latin America to invest in both US value-add and opportunistic commercial real estate and lower middle market private equity. Scott also owns Gosslee Capital Ventures that raises capital domestically to invest in parallel with ICP Group. Prior to joining ICP Group and its predecessor Investar Capital Group, Scott was the Chief Operating Officer at Cypress Equities Real Estate Investment Manager, the advisor to a \$400MM US retail acquisition fund and the regional manager of capital markets at Panattoni Development Company. Scott began his career spending 17 years in commercial real estate lending with Société Générale in Texas and New York and Comerica Bank-Texas.



# Speakers



## Clifford A. Booth

President & CEO, Westmount Realty Capital, LLC (Dallas)

A native of Montreal, Canada, Cliff Booth is the founder and CEO of Westmount Realty Capital, LLC. He holds a B.A. Honors in Political Science from McGill University in Montreal and an M.Sc. in Economics from the London School of Economics. Cliff first moved to Dallas in 1979 and founded the company shortly afterward. With over 35 years of industry experience, Cliff is recognized as an innovative and leading-edge investor. His relationship-driven approach towards investing has earned the trust of numerous U.S. and foreign institutional and private capital sources, many of which have been investing with Westmount for decades. Among his many notable achievements, he was one of the first to assemble a significant portfolio of flex industrial properties in the United States and also a pioneer investor of office and flex industrial in/around Downtown Dallas in the 1990s. To date, Cliff has led the company to build a portfolio of over 15 million square feet of industrial properties and 4,000 multifamily units with office in several cities.



## Grant Humphreys

President, Humphreys Capital (Oklahoma City)

Grant Humphreys is President of Humphreys Capital and in this role oversees Investor Relations and serves on the Investment Committee. He has 25 years of experience in real estate development and investments. Grant began his career working with Trammell Crow Company in Dallas and Oklahoma City. In the 2000's, he assembled the largest self-storage portfolio in the state. During this time, he also developed luxury, LEED certified condominiums in downtown Oklahoma City. In 2010, Grant founded Carlton Landing, a DPZ-designed lakefront resort community in southeast Oklahoma. As Town Founder of Carlton Landing, Grant directs the long-term development and culture building strategy. Key initiatives include forming a new municipality, creating a new TIF District, crafting a public-private partnership with the Corps of Engineers for federal lands surrounding Carlton Landing, and long-term economic development placemaking. With his wife, Jen, Grant founded Carlton Landing Academy, the first rural charter school in Oklahoma. Grant earned a Bachelor of Business Administration in Real Estate from Baylor University in 1998. In 2021, he earned his MBA with TRIUM, a global executive program from three elite business schools: NYU Stern, HEC Paris, and The London School of Economics.



## Andrew Holmberg

Partner, Berkeley Partners (Dallas)

Mr. Holmberg serves as a Principal at Berkeley Partners. He is responsible for acquisitions, portfolio management, investor relations and overall strategy. Previously, Mr. Holmberg worked at The Davis Companies, a Boston-based real estate investment and development company, and Long Wharf Capital. Mr. Holmberg also worked as an investment analyst at Landmark Partners, where he was involved with investing Landmark's series of discretionary funds into a variety of real estate-related opportunities globally. Mr. Holmberg is a member of the Pension Real Estate Association and the Urban Land Institute. He holds a BA in Economics from Cornell University.

# Speakers

## Jordan Thompson

Chief Investment Officer, Schlegel Capital (Dallas)

Jordan Thompson is the Chief Investment Officer of Schlegel Capital, a Dallas based single family office managing the affairs of the Schlegel family. The firm's operations include ownership of several private equity operating companies across the real estate development, logistics, and renewable energy sectors, select LP level portfolio investments, and various real estate holdings throughout the southern and western US. As CIO, Mr. Thompson is responsible for asset selection & allocation, due diligence, underwriting, negotiations, and structuring efforts for all prospective investments and oversight of the family's ongoing investment affairs. Mr. Thompson is a Chartered Financial Analyst (CFA) charterholder and licensed Certified Public Accountant (CPA). He is an alumnus of the University of Arkansas, Fayetteville with a Master of Accountancy and Bachelors with concentrations in Finance & Accounting. Prior to Schlegel Capital, he held various roles at Highland Capital Management and Deloitte.

## Matt H. Mildren

President and Co-Founder, TUG Hill Real Estate Partners (Fort Worth)

Matt Mildren is the President and co-founder of Tug Hill Real Estate Partners (THREP). Matt has over twenty five years of industry experience in leasing, development and acquisitions of real estate properties. THREP is a private equity investment company focused on purchasing real estate in the United States. The Portfolio includes office buildings, apartment complexes, shopping centers, medical office buildings, senior housing and industrial buildings. Matt received his Bachelor of Business degree from Texas Christian University (94'). In 2009 Matt completed a Real Estate Advanced Finance Certificate Program at Harvard University. Matt serves on boards of various local organizations and businesses, including the Presbyterian Night Shelter, BBVA Compass, All Saints' Episcopal School and the Cristo Rey Fort Worth High School. Matt resides in Fort Worth with his wife and their two children.

## Rootvik Patel

Managing Director, Investments, Civitas Capital Group (Dallas)

Mr. Patel is responsible for sourcing, underwriting, and evaluating prospective investments and providing detailed analysis for consideration by the Civitas Investment Committee. He has originated, underwritten, or closed more than \$500 million in debt and equity investments at Civitas, utilizing relationships with numerous best-in-class development, capital, and operating partners to access quality deals in U.S. gateway and other top markets. Prior to joining Civitas, Mr. Patel was an Investment Manager with Headington Companies, where he managed over \$300 million in real estate assets in hospitality, multifamily, and healthcare. Mr. Patel holds a bachelor's degree in finance from the University of Texas at Austin and an MBA from Southern Methodist University.

# Speakers

## Stuart P. Smith

Chief Operating Officer, SWBC Real Estate (Dallas)

Stuart Smith is the Chief Operating Officer of SWBC Real Estate, where he is responsible for identifying new development opportunities, investment relations as well as deal structuring and property dispositions. Mr. Smith brings 20+ years of commercial real estate experience, which includes participation in more than \$400 million of equity invested into commercial real estate transactions, including land developments, multi-family transactions, industrial developments, and the acquisition of office buildings and retail centers. He has also been directly responsible for a number of functions including: loan originations, financial analysis & underwriting, property acquisitions & dispositions, ground-up developments, asset & property management functions and project marketing & leasing. Mr. Smith is a graduate of the University of Alabama, where he received a Bachelor of Science degree in Commerce and Business Administration, with a double major in finance and marketing and a minor in economics. He is currently licensed as a Real Estate Broker in the state of Texas.

## Ted Fowler

Managing Director, Prospect Capital Management (New York)

Ted Fowler is a Managing Director on Prospect's Investment Team and has worked in investment management and finance since 1986. He is responsible for Prospect's real estate investment strategy. Prior to joining Prospect, Ted spent the first half of his career with Wall Street bulge bracket firms. He ran the real estate group at Credit Suisse First Boston before being named co-head of the investment and merchant banking department. He then joined Prudential-Bache as co-head of its investment and merchant banking departments. Thereafter he spent over 20 years advising and raising capital for small and mid-cap companies, at his own firm and at Laidlaw & Company, where he was the head of the investment banking group. Ted has been on numerous boards of directors and consummated private equity investment transactions across a broad range of industries. Ted received his BA from Amherst College and his MBA from Columbia University.

## Angel Bernal Robles

Partner, Cobra Carmo (Mexico City)

Mr. Bernal has a BS in Mechanical and Electrical Engineering from ITESM in Mexico City and has a MBA from Harvard Business School in Boston, MA. Mr. Bernal started his career as a business analyst for McKinsey & Company from 2001 to 2006. From 2006 to 2008, he worked as Risk Manager for GE Real Estate where he was responsible for underwriting debt and equity commercial real estate transactions including industrial, office, commercial, and residential projects. In 2008 he joined LaSalle Investment Management as VP of Acquisitions and was responsible for the investment of LaSalle's first Mexican Fund in industrial, commercial, and residential development projects. In 2013, Mr. Bernal joined the Mexican REIT Terrafina (BMV: TERRA13) as CFO of the company where he was in charge of all the financing, reporting and administrative functions of a publicly traded REIT. In 2017, he joined MDR, a privately held consumer goods company in the pharmaceutical and houseware segments as CFO/COO. Along with his friend and college partner, Mr. Federico Cerdas, he is the co-founder of Cobra Development Fund, a real estate fund dedicated to the development of projects in Mexico City.



# Speakers

## Daniel S. Choquette

Senior Managing Director, Cerberus Capital Management (New York)

Mr. Choquette joined Cerberus in 2013. Mr. Choquette is a founding member and Chairman of FirstKey Homes, one of the largest providers of high quality single-family rental homes in the United States. FirstKey Homes owns and manages over 43,500 homes in some of the country's fastest growing markets. Mr. Choquette is the lead portfolio manager of the single-family rental (SFR) strategy within the Firm's Residential Opportunities platform. Prior to his current role, Mr. Choquette was the Co-Portfolio Manager for European performing loans, leading Cerberus' effort in acquiring performing loans in Europe and the United Kingdom. Mr. Choquette serves on the Board of Directors of My Money Bank, a regulated bank in France and Cerberus portfolio company. Prior to joining Cerberus in 2013, Mr. Choquette was a Senior Portfolio Manager and Managing Director at Putnam Investments, where he oversaw the firm's Agency and Non-Agency mortgage-backed securities (MBS) and U.S. interest rate strategies. He managed up to a \$30 billion dollar balance sheet in Non-Agency and Agency MBS and contributed to portfolio construction for fixed-income hedge funds, mutual funds, and institutional portable-alpha investment mandates. From 1997 to 2002, Mr. Choquette served in various trading positions at Lehman Brothers in the Interest Rate Derivatives Group. Mr. Choquette graduated from Yale University and attended the Royal Conservatory of Music in Canada. He is a CFA charter holder.

## Bora Ozturk

Principal, March Capital Fund (San Francisco)

Bora Ozturk is the Founder and Principal of March Capital Fund, a private equity real estate fund and development company that invests in underutilized real estate assets in the San Francisco Bay Area. March Capital Funds have acquired, designed, permitted, and managed dozens of successful projects, all resulting in double-digit IRRs, even in downturns. Project costs range from \$10MM to \$100MM. Prior to starting March Capital Funds, Mr. Ozturk was an investment advisor to ultra high-net-worth families and small to mid-size companies. In his advisory role, he advised family offices and assisted in asset allocation, alternative asset and real estate strategies. Earlier, Mr. Ozturk held various leadership positions at Wells Fargo. He started his career at Wells Fargo as a senior analyst. Later on he managed 500 employees in private banking, retail banking, and business banking channels. In his last three years at Wells Fargo he was responsible for structuring interest rate derivatives, which were collateralized by commercial real estate investments. In his early career, Mr. Ozturk held positions as a management consultant at Monitor/Deloitte and as a brand manager at Unilever. He received an MBA from the Yale School of Management and a B.S. in Industrial Engineering from METU.

## Martha Hargrove

Executive Vice President, DXD Capital (Albuquerque)

Martha is an experienced fundraiser supporting the Principals to source and secure capital contributions and provide best-in-class service for DXD Capital's investors. She also leads communications, marketing and public relations efforts for DXD. She helped the team exceed its \$50 million goal for Fund I and oversaw placements in The Wall Street Journal, New York Times, NPR, GlobeSt., and other publications. Prior to joining DXD, Martha was the Vice President of Investor Relations at Titan Fund Management and Titan Development, where she helped raise the \$112mm fully discretionary ground up development TDREF I and its \$98mm follow up, TDREF II. She managed relationships with over 200 hundred investors and reported on a portfolio with over \$700mm AUM. Martha holds degrees from New York University and the University of Texas at Austin.

# Speakers

## Jim Berry

President and Co-Founder, Highline Storage Partners (Atlanta)

Jim Berry is the President and co-founder of Highline Storage Partners. Jim's primary responsibilities include directing the strategic vision and developing growth strategies, while also overseeing implementation and successful execution of the business plan. Prior to Highline, Jim founded RRB Development, a developer, owner and manager self storage facilities focused on Class-A urban infill locations. Prior to RRB, Jim was the Executive Vice President and General Manager of Las Catalinas in Costa Rica, which is an award winning 1,200-acre mixed-use new-urbanist resort town. As the first employee at Las Catalinas, Jim was responsible for all aspects of the greenfield development project starting with initial infrastructure and land planning studies, zoning and entitlements, master and phase infrastructure construction, vertical construction, legal, accounting, government relations, environmental affairs, community development, operations, sales and forward strategy. Prior to Las Catalinas, Jim served in various commercial real estate and development roles with Sivica Communities and Dewberry Capital. Jim has been a member of the Urban Land Institute (ULI), the Congress for New Urbanism (CNU), the International Council of Shopping Centers (ICSC), served as Board Member, Treasurer and various chair positions for the Georgia Self Storage Association (GASSA), a licensed Georgia Real Estate agent, and taken several CCIM certification classes. Jim received a BS in Industrial Management from the Georgia Institute of Technology.

## Kevin Bledsoe

Director of Acquisitions, DXD Capital (Albuquerque)

Kevin Bledsoe is the Director of Acquisitions for DXD. He oversees the framework and team responsible for sourcing and selecting facilities for value add strategies. From 2015 through 2020 Kevin's brokerage lead teams closed the sale of more than \$300M in self storage property sales and lead the acquisition of \$150M in self storage assets. Over the course of his career he has managed and sold more than \$1B in self storage assets across the Mid-Atlantic, Northeast, Southeast and Midwest. Kevin began his career in self storage in 2004 as a District Manager with a privately held REIT, PFG Capital and later transitioned to third-party management where he managed over 100 properties. Kevin holds a Bachelors of Science degree in Business Marketing from Bloomsburg University and is a licensed real estate salesperson in the states of Pennsylvania, Maryland and New York. In 2007 the REIT was acquired by a national private equity group, Simply Self Storage (OB Companies). Mr. Bledsoe transitioned to Simply Self Storage as a District Manager overseeing a 30-property portfolio. In 2008, he moved to third-party management where he managed more than 100 properties. In 2008 Kevin ventured into the third party management of self storage properties when he joined, a Pennsylvania focused self storage specialty firm that focuses on brokerage, construction and third-party management. The third-party management division was later sold to Storage Asset Management (SAM) in 2010. Kevin agreed to join SAM as a District Manager and was later promoted to Director of Operations for their quickly growing 65-property management company. Mr. Bledsoe's managed more than 100 properties across his management portfolio after spending more than a decade in self storage operations. In 2015 Kevin pivoted away from the operations of self storage properties and went into self storage brokerage as the Vice President of Brokerage and Acquisitions for a Pennsylvania based brokerage firm.

## Michael J. Olsen

CFO, Treasurer and Corporate Secretary, Globe Corporation (Paradise Valley)

Since 2001, Mike has served as Chief Financial Officer, Treasurer and Corporate Secretary for Globe Corporation and Subsidiaries. He also serves as Treasurer of Globe Trust Company, a Nevada-based Regulated Private Trust Company ("PTC"). Mike's role at Globe is diverse and he spends the majority of his time on Globe's real estate and other investment activities. A long-time Scottsdale, Arizona resident, Mike obtained both his B.S. in finance (with accounting emphasis) and an M.B.A. from Arizona State University. Mike spent 16 years with Bank of America, where much of his career involved financial analysis, commercial real estate finance, corporate banking, investment management and trust administration for the bank's high-net-worth clients. Prior to joining Globe, he was the Chief Financial Officer for a high-tech manufacturing company in Scottsdale and has worked in the insurance industry managing portfolio investments. Mike carries a CERTIFIED FINANCIAL PLANNER™ designation, acted as the Registered Securities Principal for Bank of America's Private Bank in Arizona, is a graduate of the Pacific Coast Banking School at the University of Washington, and was a long-time member of Financial Executive's International. He is the past board chair of Florence Crittenton Services of Arizona, which, under his chairmanship, formed Girl's Leadership Academy of Arizona, the only public all-girls high school in Arizona. Mike is active with Arizona State University as a member of the Dean's Council of 100; a board member of the W.P. Carey School's Investment Management Fund, serves as an advisor to the ASU Foundation Investment Committee and actively assists in activities related to ASU's Sun Angel Foundation, currently serving as Treasurer. Mike is also on the Arizona Chapter board of the NAIOP Commercial Real Estate Development Association.



# Speakers



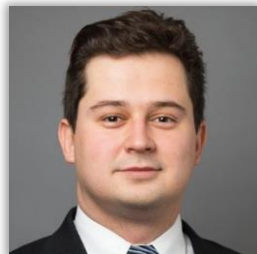
**Paul Cate**  
CEO, Mark IV Capital (Newport Beach)

Paul Marshall Cate is the Chief Executive Officer of Mark IV Capital, Inc., a real estate development company, and family office, headquartered in Newport Beach, California. As the CEO for the company, Mr. Cate takes the lead in establishing the strategic direction for the company, as well as the ongoing operations. He takes an active role in the design and execution of development projects, and has been involved with the development of over 10 million square feet of office, industrial, flex, and medical office space. Mr. Cate began his career as a Certified Public Accountant in a firm specializing in commercial real estate and high net worth individuals. He has a Master's Degree in Taxation. During his 21 year tenure at Mark IV Capital, Mr. Cate has initiated in-house development, expanded geographically from one office to offices in five western states, and implemented a best-in-class management reporting system.



**David Wheeler**  
Chief Investment Officer, Hartman (Dallas)

David Wheeler serves as Executive Vice President and CIO for both HIR Management and Hartman Advisors. Mr. Wheeler joined Hartman Management (now HIR Management) in January 2003 as an acquisition manager, following a 16-year tenure with CBRE. Mr. Wheeler worked as an acquisition manager until August 2006, when he assumed his current position. He has almost thirty years of experience in the acquisition, disposition, financing and leasing commercial real estate investments. Mr. Wheeler's responsibilities range from sourcing investment opportunities, including shopping centers, office buildings, and warehouses, to closing, ownership transition and asset management. At CB Richard Ellis, Mr. Wheeler was a Vice President in the Investment Services Division, where he successfully completed the sale of over \$400 million in commercial real estate comprising over 9 million square feet throughout the South Central U.S. Prior to CB Richard Ellis, Wheeler was a Project Engineer and Cost Estimator with HB Zachary for two years on numerous civil and site development projects including the Legacy business Park in Plano Texas for EDS.



**Alejandro Garza**  
Vice President, Development, Gatehouse Capital (Dallas)

Alejandro executes due diligence activities, financial underwriting and project management at Gatehouse Capital. He also oversees the firm's finance and development pipeline for Mexican projects. He has five years of construction experience and has held several financial positions in the past. He holds a Bachelor of Architecture and a Master in Finance from Tecnologico de Monterrey and a Masters in Real Estate from Cornell University.

# Speakers

## Chris Ropko

Chief Financial Officer, McNeill Hotel Company (Memphis)

Mr. Ropko is the Chief Financial Officer of McNeill Hotel Company. Prior to joining McNeill in 2018, Mr. Ropko served as Managing Director at RobertDouglas , where he focused on structuring and raising debt and equity capital for lodging and specialty leisure properties, portfolios and companies throughout the Americas in excess of \$2.5 billion. Immediately prior to RobertDouglas , Mr. Ropko was a Portfolio Manager and Commercial Real Estate Specialist at Pacific Investment Management Company (PIMCO). While at PIMCO, Mr. Ropko sourced and executed investment opportunities involving CMBS, performing, sub and non-performing loan portfolios, mezzanine loans, preferred equity and direct equity investments secured by all major property types, including hospitality assets. Prior to joining PIMCO, Mr. Ropko held roles at Goldman Sachs in the Real Estate Principal Investment Area focused on acquisitions and asset management almost exclusively in the hospitality sector on behalf of the Whitehall series of private equity funds. Mr. Ropko is a recurring Guest Lecturer at USC's Marshall School of Business on the topic of hospitality real estate finance. He has a Bachelor of Science degree from Cornell University's School of Hotel Administration

## Brent Leblanc

Executive Vice President, Peachtree Hotel Group (Atlanta)

As executive vice president, Brent is responsible for leading the business development team, enhancing hotel brand relationships and sourcing real estate investment opportunities for Peachtree Hotel Group ("Peachtree") and all its affiliates – Stonehill, Stonehill PACE and Peachtree Hospitality Management. As part of Peachtree's executive leadership team, Brent has participated in more than \$3.0 billion of real estate transactions across the enterprise since joining the company in 2012. Brent has close to 30 years of hospitality experience, having launched hotel brands and completing complex real estate transactions with the largest hotel operators and real estate developers in the U.S.





# Pre-Event Networking Cocktail

---

Day 1- Wednesday, May 4<sup>th</sup>

**Sponsored by:**



**When:** Wednesday, May 4th

**Where:** One Arts Plaza

1722 Routh St, Suite 800, Dallas, TX 75201

**Bar Time:** 6:00 pm CT – 8 pm CT

**Who:** Conference Attendees & Friends

# Agenda Outline

**THURSDAY****MAY 5<sup>TH</sup>**

8:00 am CT

## Registration & Breakfast Networking

Sponsored by:

civitas

9:00 am CT

## Investing in the Sunbelt: LP perspectives

Leading institutional investors and family offices discuss their allocation strategies and investment appetite for US Real Estate. What checks the boxes for allocating capital to funds or on a direct basis within this space? How are they measuring returns and what is their due diligence process? What is the impact of rising rates on cap rates across all asset classes?

**Moderator:****Jonathan Bren**, Founder, **Bren Ventures****Panelists:****Jamil McNeal**, Director of Investments, **True North Advisors****Alex Abrams**, Managing Director, **StepStone Group****T. Preston Herold**, President, **Hunt Southwest****Scott Wilson**, Chief Underwriting Officer, **The Beneficient Company Group**

10:00 am CT

## Segment Focus- Industrial & Last Mile Logistics

With the rapid acceleration of e-commerce in the wake of COVID-19, major online retailers are picking up large warehousing and manufacturing spaces to keep up with the surge in demand, which is ultimately responsible for industrial real estate experiencing vacancies at historic lows in 2021. As more companies shift to online delivery models, total supply growth of industrial real estate in the United States could reach an additional 1 billion square feet by 2025. Leading fund managers, developers and operators discuss investment opportunities in the space in the United States and how they have met the high demand.

**Moderator:****Scott Gosslee**, Managing Director, **ICP Group****Panelists:****Clifford A. Booth**, President & CEO, **Westmount Realty Capital****Grant Humphreys**, President, **Humphreys Capital****Andrew Holmberg**, Partner, **Berkeley Partners**

# Agenda Outline

**THURSDAY****MAY 5<sup>TH</sup>**

11:00 am CT

## Segment Focus- Multifamily

The US multifamily sector finished 2021 with overall occupancy and net effective rents above pre-pandemic levels. With a rising interest rate environment and the volume of new Class A product coming online this year, there are some concerns about the certain fundamentals for the asset class. Our panel of multifamily experts discuss opportunities and outlook for multifamily specifically in sun belt markets, covering acquisitions and development across certain key geographic markets.

**Moderator:**

**Jordan Thompson**, Chief Investment Officer, **Schlegel Capital**

**Panelists:**

**Matt H. Mildren**, President and Co-Founder, **TUG Hill Real Estate Partners**

**Rootvik Patel**, Managing Director, Investments, **Civitas Capital Group**

**Stuart P. Smith**, Chief Operating Officer, **SWBC Real Estate**

**Ted Fowler**, Managing Director, **Prospect Capital Management**

12:00 pm CT

## Networking Luncheon

Sponsored by:



1:30 pm CT

## Segment Focus- Single Family Rental

The COVID-19 Pandemic has shown the severity of the US housing shortage. Home prices continue to soar due to the surging demand and limited supply. As the shortage of single-family homes and rising home prices both help to put home ownership further out of reach, suburban demand will increasingly shift to single family rentals. This panel will discuss the institutional adoption of SFR, the current investment climate and opportunities to take advantage of this asset class.

**Moderator:**

**Angel Bernal Robles**, Partner, **Cobra Carmo**

**Panelists:**

**Daniel S. Choquette**, Senior Managing Director, **Cerberus Capital Management**

**Bora Ozturk**, Principal, **March Capital Fund**



# Agenda Outline

**THURSDAY****MAY 5<sup>TH</sup>**

2:00 pm CT

## Segment Focus- Self-Storage

The self-storage industry's continued growth in past economic downturns gives investors confidence in this asset class during macro uncertainty and a rising interest rate environment. On this session, leading real estate executives discuss current climate in the self-storage market covering development, conversions and acquisitions.

**Moderator:**

**Martha Hargrove**, Executive Vice President, **DXD Capital**

**Panelists:**

**Jim Berry**, President and Co-Founder, **Highline Storage Partners**

**Kevin Bledsoe**, Director of Acquisitions, **DXD Capital**

2:30 pm CT

## Segment Focus- Office

The Sun Belt markets of Austin, Miami, San Jose, Charlotte and others have been relatively resilient from company in-migration and the tech sector's dynamic growth. Despite the positive momentum, the national office vacancy rate will reach its highest level since 1993 in 2022 due to the delivery of more than 53 million sq. ft. of new office construction. Workplace flexibility will become even more embedded in corporate business models this year. Leading office experts discuss their perspectives on the market.

**Moderator:**

**Michael J. Olsen**, CFO, Treasurer and Corporate Secretary, **Globe Corporation**

**Panelists:**

**Paul Cate**, CEO, **Mark IV Capital**

**David Wheeler**, Chief Investment Officer, **Hartman**



# Agenda Outline

**THURSDAY****MAY 5<sup>TH</sup>**

3:00 pm CT

## Segment Focus- Hospitality

The global lodging industry demonstrated its resilience in 2021, following the drastic and immediate shock demand observed in 2020 with the onset of the COVID-19 health crisis. In 2022, the make-up of demand and the progression of the recovery will continue to be top of mind for hotel owners, operators, and investors. Additionally, the industry will have to navigate operational hurdles brought on by labor shortages, rising inflation, supply chain issues and the impact on service levels given the difficulties operating in such an environment. Leading hospitality investors, owners and operators discuss the current market climate in more detail.

**Moderator:****Alejandro Garza**, Vice President, Development, **Gatehouse Capital****Panelists:****Chris Ropko**, Chief Financial Officer, **McNeill Hotel Company****Brent LeBlanc**, Executive Vice President, **Peachtree Hotel Group**

3:30 pm CT

## Meetings & Networking

4:00 pm CT

## End of Conference

# Participation Options : **OPTION A**

## STANDARD PASS:

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

Early Bird: \$1,500 USD- ENDS April 8th

Pre-Registration: \$1,700 USD- ENDS April 22nd

Standard: \$2,000 USD

## COMPLIMENTARY:

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

## Conditions:

- Carmo carefully vets all participants to make sure they fit the LP criteria
- Carmo has the right to refuse any participant from joining should they not meet the criteria
- If you raise external capital, you cannot join on a complimentary basis.



# Participation Options: **OPTION B**

## ATTENDEE LIST SPONSORSHIP

- **Attendee List**
  - Exclusive access to updated conference attendee list two weeks before 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**
  - Branding and announcement to all attendees during networking break
  - Ability to upgrade food and beverages for networking
  - Sponsor may choose to have 10' x10' space in networking area to distribute marketing material and present information regarding company.
- **Passes**
  - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 3 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.

**\$7,500 USD**



# Participation Options: **OPTION C**

## 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 two weeks before 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**
  - 5 Company passes to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 5 Company passes to event networking app for 1 week.
- **Branding**
  - Sponsorship branding throughout meeting, agenda and marketing campaigns.
  - Entitled to a Full-Page Advertisement in conference brochure

**\$12,500 USD**





# Participation Options: **OPTION D**

## 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 two weeks before 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**
  - 5 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**



# Participation Options: **OPTION E**

## 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 two weeks before 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**
  - 5 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

**\$20,000 USD**



# Participation Options: **OPTION F**

## IN-PERSON 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.
- **Priority Networking Instrument**
  - 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.

## Contact Information

### **Roy Carmo Salsinha**

President & CEO

T:+1-646-688-3375

roy.salsinha@carmocapital.com

### **Marjorie Cucalon**

Partner, Carmo Capital

T:+1-786-252-6196

mcucalon@baltrax.com

### **Erick Cruz**

Senior Vice President, Private Equity

T:+1-646-688-5327

erick.cruz@carmocapital.com

### **Renato Ferreira**

Vice President, Real Estate

T:+1-646-688-3375

Renato.ferreira@carmocapital.com

### **Nicolás Rodríguez**

Vice President, Private Equity

T:+1-646-688-3205

nicolas@carmocapital.com

### **Catherine Correia**

Associate, Investor Relations & VP, Marketing

T:+1-646-688-3207

catherine.correia@carmocapital.com

### **Flavia Correia**

Associate, Investor Relations

T:+1-646-688-3207

flavia.correia@carmocapital.com

### **Paul Tuccillo**

Managing Director, Real Estate

T:+1-516-524-3990

paul.tuccillo@carmocapital.com

# Thank You

49 Huntington Bay Road  
Huntington, NY 11743

[www.carmocompanies.com](http://www.carmocompanies.com)