



# The Latin America US Real Estate Meeting

*Miami Art Basel Week*

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**W South Beach**

November 29<sup>th</sup> & 30<sup>th</sup>, 2021



**IN PERSON EVENT**

**LIVE ONLY, RECORDING IS PROHIBITED**

# The Latin America US Real Estate Meeting

W SOUTH BEACH– November 29th & 30th, 2021

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A photograph of a classic Art Deco building in Miami, featuring white walls, orange and teal accents, and a prominent palm tree against a clear blue sky.

# The Latin America US Real Estate Meeting

W South Beach Miami, FL – November 29 & 30, 2021

Dear Colleague,

It is with great pleasure that I invite you to join us at the Fourth Annual Latin America US Real Estate Meeting during Art Basel week in Miami. This exclusive institutional gathering brings together the most important real estate investment vehicles, institutional allocators and private wealth investors that are actively investing and developing across the United States and Latin America. Over 250 of the leading US and Latin American based private equity real estate funds, institutional investors and other real estate professionals will come together to network and discuss investment opportunities, allocations, and the performance of all real estate related asset classes across these regions. It is our intention that this meeting will serve as a catalyst in generating increased cross border institutional real estate transactions between Latin America and the US in the years to come.

We look forward to hosting you in Miami.

Best,

Roy Carmo Salsinha

President, CEO

Carmo Companies







# Art Basel Week

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## What is Art Basel Miami?

First staged in 2002, Art Basel Miami is an annual art show held at Miami Beach. Art Basel stages three major fairs each year in Hong Kong, Basel Switzerland and Miami Beach. The event draws more than 4,000 artists from across the world and puts on over 250 galleries catering to the most exclusive art collectors, museums and curators. The event focuses on modern and contemporary art. The weekend of Art Basel has become one of the largest draws for Miami, with parties, satellite fairs and major events being held in conjunction with the show.

## When is Art Basel Miami?

Art Basel Miami Beach is held December 2, 2021, through December 4, 2021.

## Where is Art Basel Miami?

Art Basel Miami Beach 2021 is at the Miami Beach Convention Center, located at 1901 Convention Drive, Miami Beach. There are also private shows, film screenings and performances that take place throughout Miami Beach and surrounding Miami areas.

For more information, please visit [www.artbasel.com/miami-beach](http://www.artbasel.com/miami-beach)



# By the Numbers...

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**\$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

**1** day







# Covid Related Protocols

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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.

- All attendees are required to provide proof of vaccine or \*proof of negative COVID-19 test
- Temperature check upon entry
- Modified room set up and seating arrangements
- Sanitation stations
- Limited touch food and beverage service

*\*Proof of negative test must be no more than 2 days before event*

**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...

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- US Focused Private Equity Real Estate Funds
- US Focused Real Estate Developers (Institutional Quality)
- Hedge Funds
- 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
- LATAM Family Offices, Multifamily Offices and Private Banks
- Latin American Pensions and Investment Consultants
- Miami and Latam Government officials
- Banks and Investment Banks
- Lawyers



# Previous Sponsors Have Included:

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MANAGEMENT

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Real Estate Investment

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REAL ESTATE GROUP

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ALTERNATIVE REAL ESTATE

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Alternative Asset Management

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SAN FRANCISCO  
LOS ANGELES  
AND NEW YORK



# Institutional Partner



# Lead Sponsor



For over three decades, real estate development and investment firm Tricap has been exceeding projected returns for their co-investment partners across a variety of asset classes, groundbreaking and market-changing projects.

With the execution of prudent investment decisions against the backdrop of a creative business plan and capital structure implementation, Tricap seeks to create superior investment returns by identifying early-stage market opportunities and unique transactions.

Manhattan-based Tricap has developed and maintained an expansive portfolio of real estate holdings including hotel, office, retail and mixed-use properties in major metropolitan markets including New York City, Miami, Silicon Valley, Seattle and Las Vegas.

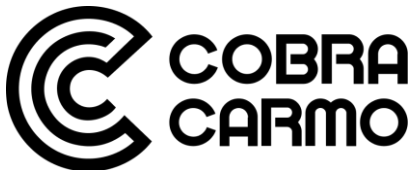
Tricap's passionate and devoted team of seasoned experts, led by David Edelstein, applies the core investment principles mirroring that of their founder and continues to differentiate themselves from their competitors while elevating the expectations of their partners and clients.







**BALLASTROCK**



# 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.

Ballast Rock specializes in the distribution of best-in-class real estate and growth private equity investments. Ballast Rock was founded to distribute funds that focus on income generating funds with high performance, transparency, communication and access to the management team.

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).

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.

# Sponsors



Cobra Development ("CD") is a real estate development company dedicated to invest in commercial and residential real estate projects throughout Mexico, offering its investors an attractive risk adjusted return. Being development company allows us to optimize the development process reducing pre-development, construction and commercialization times. Our residential strategy focuses in the development of small to medium projects (4 to 100 units) in Mexico City and its metropolitan area catering to the growing middle class. Our commercial developments include mixed-use projects in major cities including retail, office and residential space.



Dalfen Industrial LLC is one of the nation's largest buyers of industrial real estate and is a leader in the last-mile property sector. Their investment focus is on strategically located urban infill warehouses and distribution buildings. Dalfen currently owns and operates over 25 million square feet of premier industrial properties throughout the United States.



The GSH Group focuses on the acquisition, management, and ownership of multifamily residential apartment communities in the United States. Multifamily continues to prove itself to be the most resilient sector of the US real estate market, and investors are winning with GSH. With our concierge approach, we offer industry-leading communication and personalized investor relations services. We do the hard work and save our investor-partners the headaches and time involved in owning an investment property. GSH prides itself on offering ethical and transparent opportunities for our investors to achieve superior returns and immediate and ongoing income through quarterly distributions and capital growth while maintaining a strong focus on capital preservation.



Greenbridge is a full-service commercial real estate firm that specializes in ownership, property management, leasing, construction and turnaround of value-add and core plus properties. Partners Sean Hashem and Fareed Kanani established the firm in 2012 with a focus on purchasing underachieving projects with the highest potential of becoming "best in class" properties. For over 30 years, the expert team has worked together to apply its resources to the success and optimal repositioning of each asset purchased and has been dedicated to maintaining that standard of excellence. We are constantly looking for innovative yet practical ways of improving metrics of properties with a keen focus on operational effectiveness.



# Sponsors



HAP Investments is a New York City-based real estate investment group that specializes in the development of residential and commercial properties. HAP works with private investors to create profitable investment opportunities that have a strong prospect for long term upside profits. Led by Eran Polack, the HAP Investments brings together a skilled group of business professionals including Nir Amsel and Amir Hasid. In addition to property development, the HAP team's experience covers global real estate markets, real estate finance and law. For more information, visit [www.hap-ny.com](http://www.hap-ny.com).



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.



Magellan Value Partners (MVP) is a real estate development and investment firm based in Los Angeles, California. The firm was founded in 2016 by long-term real estate veterans who have known and worked with each other for over two decades and successfully acquired, developed, built, and managed over 20 million SF of assets throughout their collective careers. MVP specializes in acquiring value added industrial and self storage assets, or land for development into industrial or self storage properties. Our core focus is acquiring and investing in properties with the potential to add value. With a meticulous eye for site planning and entitlements, and building aesthetics, Magellan Value Partners takes a hands-on approach to their projects. By optimizing operational efficiency and executing value-enhancing initiatives, MVP strives to deliver institutional-quality assets to customers and investors. Our team's years of experience and successful track record, accompanied by loyal friendships, collaboration, and integrity have created a dynamic and authentic firm.



Peninsula Alternative Real Estate ("PARE") invests in General Partner ("GP") equity positions alongside leading developer/operators in student and senior housing projects and provides mezzanine debt to real estate developers across the United States. Co-GP equity investments provide superior returns than those received by Limited Partners in traditional real estate funds with similar strategies, as co-GP positions effectively skip one layer of fees. Student housing performed better than expected during COVID, and through the global financial crisis of '08-'09. Similarly, Senior housing has been the second-best performer out of all other traditional real estate sectors for the past 10 years. PARE has a growing and diversified portfolio of 45 properties in over 12 states.

# Sponsors



At Quest Capital, we deliver a quality, professional service and maintain a personalized and dedicated treatment with all our investors. As an investment bank with more than 800 clients, we focus on the asset management, wealth management, corporate finance, and private equity areas. The Real Estate division of Quest Capital offers financial products that allow our clients to participate with successful returns in development, rental and value-add investments and Real Estate in Chile, USA, Peru and abroad. In addition, we identify with projects in which we invest with real estate managers of recognized experience in the industry. In each investment, the quantitative and qualitative variables of the business are methodologically analyzed, seeking a healthy balance between risk, and expected return. We have a strong team with excellent preparation and experience. In our Real Estate area, we manage assets of more than USD 400 million, and we can offer our clients, through different investment vehicles, the possibility of achieving a diversified portfolio for this asset class.



RMWC originates and invests in short-term Real Estate Secured Bridge Loans, focusing primarily on performing senior credit with low Loan-to-Values and lender-friendly terms. Coleman Andrews, Co-founding Partner of Bain Capital, and Steven Fischler, a veteran of the 2008-2011 Lehman real estate recoveries, lead a team of 11 professionals. With \$3 Billion financed since inception in 2008, the RMWC team has extensive nationwide origination, underwriting, asset management and workout experience across all property types. Fund IV launched July 2020 in a tax and fee-advantaged REIT structure, seeking to benefit from recent lending market dislocations. The Fund targets net returns of 11-13% with quarterly income distributions. We believe Fund IV's 15 closed transactions to date and our seven current pending deals validate the best vintage characteristics since 2009 for RMWC's Secured Bridge Lending program. Potential for co-investments. Firm AUM: \$430MM.



Texas Global Equity ("TGE") and its affiliates have a 100% success record in the management of six real estate private equity funds that have provided debt and equity to iconic development projects that have realized \$800 million in value. The six funds' investments span four asset classes: luxury condominium, market rate multifamily, student housing and hospitality. Every TGE project has been delivered on time and within budget, followed by successful stabilization or exit at financial performance levels above each fund's respective plan. The average IRR realized by equity investors across all projects is 45.0%. Three projects stand out as exemplary recent additions to the Austin community and skyline across the past five years. Texas Global Equity's sister company Texas Growth Fund is the exclusive EB-5 Capital Partner to the City of Austin.



Thor Equities is a global investment firm with a 35 year track record of investing in global urban mixed use real estate. The firm has AUM of \$9.2 billion and over 180 properties in addition to a realized IRR of 21.0% and 1.9x equity multiple over the past 20 years. Thor has offices in US, Mexico, the UK, Spain and France. The firm has a unique insight into commercial real estate markets and trends through its integrated business lines and activities. The firm's strategy is currently focused on Life Sciences and Last Mile Logistics through separate accounts, direct investments and funds.





# 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).

Whitestone

Whitestone, a private equity, real estate investment firm, founded earlier this year, entered the SFR space with a focus on homes in blighted inner-city neighborhoods. Whitestone brings the properties up to a federal housing standard and then seeks out lower income tenants, most of which partake in the section 8 government housing voucher program, which covers anywhere from 70-100% of the rent. In under a year, Whitestone has become one of the largest single family rental operators in the country, via John Burns Real Estate Consulting. Whitestone looks to align themselves with valuable partners to continue to grow and invest with. Whitestone's overall purpose is to improve the livelihood of the communities and tenants in which they further invest in.

# Keynote Speakers

## Orlando Bravo

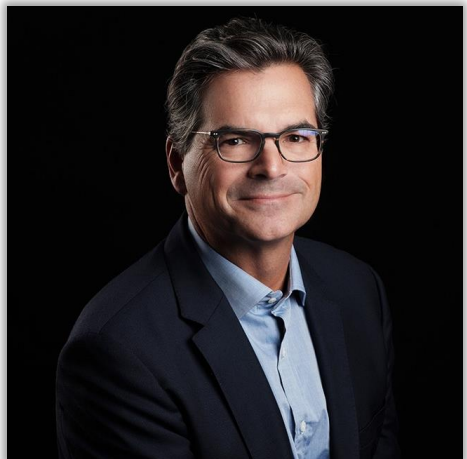
Founder & Managing Partner, Thoma Bravo (Miami)



Orlando Bravo is a Founder and Managing Partner of Thoma Bravo. He led Thoma Bravo's early entry into software buyouts and built the firm into one of the top private equity firms in the world. Today, Orlando directs the firm's strategy and investment decisions in accordance with its principles of partnership, innovation and performance. Orlando has overseen over 325 software acquisitions conducted by the firm, representing more than \$100 billion in transaction value. Forbes named him "Wall Street's best dealmaker" in 2019, and he was part of Thomson Reuters "Eight Buyout Pros to Watch" in 2009. Orlando was born in Mayaguez, Puerto Rico. He graduated Phi Beta Kappa with a bachelor's degree in economics and political science from Brown University in 1992, and earned a JD from Stanford Law School and an MBA from the Stanford Graduate School of Business in 1998. He is the Founder and Chairman of the Bravo Family Foundation, the mission of which is to provide access and opportunities to young adults in Puerto Rico. After Hurricane Maria hit Puerto Rico in 2017, he spearheaded a humanitarian mission to remote communities on the island. In 2019, Orlando committed \$100 million to the Foundation's Rising Entrepreneurs Program (REP) with the goal of fostering entrepreneurship in Puerto Rico. The Orlando Bravo Center for Economics Research at Brown University supports innovative research, training and collaborative projects for faculty and students in the Department of Economics. At Stanford Law School, Orlando created the Bravo Family Public Interest Post-Graduate Fellowship Fund to support students seeking full-time employment in public interest. Orlando's philanthropic interests also include causes in healthcare. He endowed faculty scholar and fellow positions at Stanford University's Sean N. Parker Center for Allergy Research and supports a wide range of medical research. He is a member of the Board of Trustees at Memorial Sloan Kettering Cancer Center. Orlando is a Member of the Board of Trustees of the Corporation of Brown University.

## Antonio Luis Ferré Rangel

CEO, Kingbird Investment Management (Boston)



As Chairman/CEO of Kingbird Investment Management, Mr. Ferré oversees all aspects of Kingbird Investment Management's operations, asset management and strategy execution, and serves on Kingbird's Investment Committee. Since the mid-1990s, Mr. Ferré has led the family office holding company's real estate investment strategy, initiating investments in value-added real estate opportunities in high-growth U.S. markets and Latin America. Mr. Ferré is a member of the Board of Directors of Grupo Ferré Rangel and GFR Media. Previously, Mr. Ferré headed the Grupo Ferré Rangel Family Office with responsibilities for investments, budgeting, and philanthropy. Prior, Mr. Ferré joined Puerto Rico Cement in 1992 and served as the President/Chief Operations Officer of Puerto Rican Cement (an NYSE-listed company) from 1999-2002. He previously served as Executive Vice President, and as Vice President of Operations and Strategic Planning from 1992 to 1998. Mr. Ferré negotiated and executed the eventual sale and privatization of Puerto Rican Cement to CEMEX. As President of Puerto Rican Cement, Mr. Ferré oversaw the Ponce Cement Plant, Florida Lime, DMI real estate, St. Regis Paper, PEMCO the distribution company and Ponce Capital, the company's financial arm.

# Keynote Speakers



**Mayor Dan Gelber**  
Mayor of Miami Beach

Mayor Dan Gelber was born in Miami Beach & raised to believe in public service by his father, respected former Miami Beach Mayor Seymour Gelber, & his mother, Beach High teacher Edith Gelber. Dan lived these principles as a federal prosecutor, State Representative & Senator, & now as Mayor of Miami Beach. He was elected in 2017 with 80% of the vote & reelected in 2019 without opposition. Dan practices law with the firm of Gelber Schachter & Greenberg PA. He is married to Joan Silverstein, a career federal prosecutor, & they have three children & a dog named Buddy.



**Mark W. Yusko**  
CEO & Chief Investment Officer, Morgan Creek; Managing Partner, Morgan Creek Digital (North Carolina)

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. He is also the Managing Partner of Morgan Creek Digital Assets. Morgan Creek Capital Management was founded in 2004 and currently manages close to \$2 billion in discretionary and non-discretionary assets. Prior to founding Morgan Creek, Mr. Yusko was CIO and Founder of UNC Management Company (UNCMC), the Endowment investment office for the University of North Carolina at Chapel Hill. Before that, he was Senior Investment Director for the University of Notre Dame Investment Office. Mr. Yusko has been at the forefront of institutional investing throughout his career. An early investor in alternative asset classes at Notre Dame, he brought the Endowment Model of investing to UNC, which contributed to significant performance gains for the Endowment. The Endowment Model is the cornerstone philosophy of Morgan Creek, as is the mandate to Invest in Innovation. Mr. Yusko is again at the forefront of investing through Morgan Creek Digital Assets, which was formed in 2018. Morgan Creek Digital is an early stage investor in blockchain technology, digital currency and digital assets through the firm's Venture Capital and Digital Asset Index Fund. Mr. Yusko received a BA with Honors from the University of Notre Dame and an MBA in Accounting and Finance from the University of Chicago.



# Keynote Speakers



**David Fann**  
Vice Chairman, Aksia (New York)

David is Vice Chairman and has over 30 years of experience in the private markets industry. David is responsible for the overall framework of the firm's private markets offering and provides senior advisory support to Aksia TorreyCove's client advisory and private market investment research activities. Prior to Aksia's acquisition of TorreyCove Capital Partners, David was co-founder, President and Chief Executive Officer of TorreyCove Capital Partners. He was responsible for managing the day-to-day business activities of the firm. Prior to TorreyCove, David was the President and Chief Executive Officer of Pacific Corporate Group. Throughout his career, David has led investment organizations that have invested/committed over \$45 billion in private equity investments. He has invested in 26 leveraged buyout, private equity and venture capital investments as a lead investor or co-investor, of which ten became publicly traded through initial public offerings – a number were acquired by Fortune 500 companies. Previously, he was a Managing Director of US Trust and Vice President of Citicorp Venture Capital. David has served on the board of directors of eleven companies, as a board observer for seven, as chairman of the board of directors for two companies, and currently serves on the Honorary Advisory Board for the Association of Asian American Investment Managers and on the advisory board for the Robert H. Toigo Foundation. He graduated from Stanford University with a BAS in Industrial Engineering and Economics (dual degree).



**Alex Bhathal**  
Founder, Revitate, Co-Owner, Sacramento Kings (Newport Beach)

Alex Bhathal is Co-Founder, Executive Chairman, and Managing Partner of Revitate, building upon the legacy and success of the RAJ Capital family investment office. Alex is co-owner and Executive Director of Sacramento Basketball Holdings, which owns the Sacramento Kings, Golden 1 Center and Downtown Commons entertainment and sports district. He is also Managing Partner of RevOZ Capital, a leader and early adopter in Opportunity Zone real estate investing; Senior Operating Partner of Rx3 Growth Partners, a consumer growth fund; a Board member for Mark IV Capital, Aspyr Holdings, Gen Next, and the Young President Organization California Coast Chapter. Alex earned his B.A. from the University of California Los Angeles, M.B.A from the University of Southern California, and is completing the Presidents Program in Leadership at Harvard Business School.

# Speakers

## Daniel J. Healy

Chief Executive Officer, Civitas Capital Group (Dallas)

Mr. Healy is founder and CEO of Civitas Capital Group, an investment management firm based in Dallas, Texas. Under his leadership since 2009, the firm has been recognized as one of the fastest growing companies in Dallas with assets under management of over \$1.4 billion, invested primarily in real estate, lodging and related asset classes. Mr. Healy continues to be responsible for all facets of the firm's strategic growth, identifying talent, delivering expertise, and ensuring the firm's two operating divisions, Alternative Investments and EB-5 Capital, have an unrelenting focus on customer service. Prior to founding Civitas, Mr. Healy held senior executive roles with a boutique real estate investment fund and with Highland Capital Management, LP. Mr. Healy holds an MBA from the Cox School of Business at Southern Methodist University and a bachelor's degree in government and politics from the University of Texas at Dallas. He serves on the Board of Directors of Invest in the USA (IIUSA), the nonprofit trade association representing regional center operators. An active member of the Dallas business and civic community, Mr. Healy is a member of the Dallas Citizens Council and the Dallas Assembly.

## Luis Vicente D'Amato

Partner/ Portfolio Manager, Aston Capital Management (Miami)

Mr. d'Amato has an extensive background in the Brazilian financial market. From 1991 until 2012 he worked in Hedging-Griffo and Credit Suisse Hedging-Griffo, being a partner since 1994. He spent 14 years as a trader at the Equities Desk, 2.5 years as a Equities Trader for the Asset Management Business and 3.5 years as Head of Investor Relations and Capital Raising for the Asset Management Business. After leaving Credit Suisse Hedging-Griffo in 2012, Mr. d'Amato became the portfolio manager of Granfondo Fundo de Investimento, a Brazilian fund of hedge funds which invested in all asset classes in Brazil, including equities, fixed income, credit, distressed credit, private equity, venture capital, special purpose companies and hedge funds. In 2014 Mr. d'Amato moved to the US where he founded Aston Capital Management in 2015 along with Mr. Eduardo Brenner. Mr. d'Amato has a Bachelor's degree in Business Administration with a focus in General Management from the Sao Paulo School of Business Administration, a Masters in Business and Economics from the Sao Paulo Institute of Applied Economic Research and a Master of Business Administration (M.B.A.) from Northwestern University – Kellogg School of Management. Mr. d'Amato is a Chartered Financial Analyst (CFA) charterholder. Mr. d'Amato is a Founding Partner of Aston Capital Management, Portfolio Manager of Aston Fund and responsible for Aston Capital's Financial Advisory Services .

## Nadav Goshen

Managing Partner, Vizcaya Capital (Miami)

While obtaining a Master in Business Administration with a concentration in Finance, Nadav was a client advisor at Bank Leumi. He worked in several market segmentations at Bank Hapoalim and continued to focus within the field of international banking at UBS Wealth Management. With his goal-driven approach towards offering superior customer value to his ultra high net worth clients.

# Speakers



**Rafael Alcantara-Lansberg**  
Chief Investment Officer & Managing Director, Harbor Ithaka (Miami)

Rafael Alcantara-Lansberg started working in the financial markets in mid-1997 on an EM bond & arbitrage trading desk. He currently heads the firm's global macro research and portfolio construction & management efforts. His areas of interest include portfolio theory, risk-driven allocation, and the psychology of markets. Harbor Ithaka is an Investment Consulting firm specializing in risk management and alternative investment solutions, serving large families and groups with complex balance sheet dynamics.



**Jorge Escobar**  
Managing Partner/ Co-CEO, Black Salmon (Miami)

Utilizing his institutional-minded discipline, Jorge founded Black Salmon in 2017. Throughout his career, Jorge has specialized in structuring and overseeing the investment strategies of both corporate and private funds. Prior to Black Salmon and TSG, Jorge held top positions in the banking industry involving global responsibilities for two decades, earning him a proven track record. While working for more than nine years at HSBC Bank N.A., Jorge last served as Global Head of the HSBC Private Bank for the Chilean market (based in the U.S.), where he oversaw more than \$1.5B for HNW clients and led the largest transactions for the region's private bank.



**Nicolas Sorensen**  
Partner, Quest Capital (Chile)

Since December 2015, has managed Quest AFI, an investment fund administration company. With 11 real state funds in Chile, Perú and the US, 30 development projects and over 2.500 households under construction. During the period of 2014 and 2015 served as the Chief Business Development Officer (CBDO) at NorteSur, a Chilean investment company that focuses on the development and creation of innovative, high-impact projects, with a portfolio of 54 companies and 3 foundations. He was responsible for managing the holding's financing and real estate business areas, identifying new sales prospects and driving business growth and requirements for product development that will be coordinated with the firm's R&D function. From 2010 to 2014, he held the position of Investment Manager (CIO) at CORFO, the Chilean Economic Development Agency, where he was responsible for managing the agency's investment funds and promoting innovation and entrepreneurship within them, developing unique programs designed to have an industry-wide impact. Prior to his appointment as CORFO's Investment Manager, he worked for seven years in the banking industry, managing risk evaluation and credit approval. Born in Santiago, Chile, Mr. Sorensen holds a Business Administration degree with a major in Management from the Universidad de Los Andes de Chile, and an MBA from Babson College, US.



# Speakers



**Felipe Figueroa**  
COO, Independencia Asset Management

Mr. Figueroa currently serves as Chief Operating Officer of Independencia Asset Management, a real estate asset management firm with over \$2B in AUM across various markets and asset classes including office, retail, industrial, and multifamily. Since 2017, he has overseen all of the firm's asset management, acquisition, and financing activities. Having joined IAM in 2010 as Director of Asset Management, he has been involved in over \$4B of transaction activity. Prior to joining IAM, Mr. Figueroa worked in corporate banking finance for infrastructure concession projects. He received his degree in Civil Engineering and Masters in Construction Management from Pontificia Universidad Católica de Chile.



**Pablo Massera**  
VP of Real Estate, FYNSA (Chile)

He joined FYNSA in 2019. As manager of the real estate area, he participates in the investment committees and he is a permanent member of the administrative committee of the Real Estate Investment Funds. Previously, he was responsible of leading the real estate development and operations of the main senior residences company in Chile. He was also in charge of real estate management and consulting for the development of shopping centers and residential projects. Earlier, he worked in financial institutions, such as LarraínVial, HSBC and Citibank. He is Industrial Engineer and holds a Master of Applied Finance degree. He has more than 25 years of experience in different sectors.



**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

## Adam Lotterman

### Co-CIO, Bluerock Fund Advisor (New York)

Mr. Lotterman is co-founder of Bluerock Fund Advisor (\$3B+ AUM) and has been a key member of Bluerock Total Income+ Real Estate Fund's investment team since its inception in 2012. He currently serves as the Fund's Senior Portfolio Manager, as well as the Advisor's Co-Chief Investment Officer and Lead Economist. Prior to joining Bluerock, Mr. Lotterman was Vice President at Forman Capital (now Trez Capital), a private commercial real estate lender; Senior Valuation Analyst at Bayview Asset Management (former hedge fund affiliate of The Blackstone Group); and Senior Analyst for Goodkin Consulting, the former real estate consulting arm of PricewaterhouseCoopers. Additionally, Mr. Lotterman was an Adjunct Professor at Nova Southeastern University where he taught Market Analysis in the Masters of Real Estate Development program. He received an M.S. in International Real Estate from Florida International University, where he graduated first in class, and a B.S. Degree in microbiology with a minor in chemistry from the University of Florida.

## Sean Dalfen

### President and Chief Investment Officer, Dalfen Industrial (Dallas)

Sean Dalfen is the President and Chief Investment Officer of the General Partner and Dalfen Industrial. He has oversight responsibility for all of Dalfen Industrial's businesses, the firm's investment activities, strategic direction and management of the firm's resources. Sean is also a member of the all of the firm's Investment Committees across their funds and investment vehicles. After joining the firm in 2006, Sean was instrumental in the firm becoming one of the largest buyers of industrial real estate, having executed over \$3.5 billion of transactions involving in excess of 40 million square feet of industrial properties in the U.S. and Canada. Prior to Dalfen, Sean worked at NAI Commercial as an Investment Sales Broker where he was one of the company's Top 10 producers in Canada.

## Martin Slusser

### Founder and Managing Partner, Magellan Value Partners (Los Angeles)

Founder of Magellan Value Partners ("MVP") and Co-Founder of The Magellan Group (established in 1990), Mr. Slusser brings over thirty-seven years of experience working in commercial real estate development, where he focuses on Industrial and Storage, developing over 7M SF. Prior to Magellan, Martin was Division Partner in the Los Angeles office of Trammell Crow where he acquired and developed industrial valued at \$350M; negotiated 211 leases; and managed 13M SF. Martin leased over 3M SF of industrial for three consecutive years, earning the Top Industrial Leasing Award each respective year. Martin began his career working for Morgan Stanley in New York City as an analyst and worked with The Newhall Land & Farming Company. Mr. Slusser received an MBA from Stanford Graduate School of Business and holds an AB Degree from Stanford University. He is a member of the Stanford University President's Fund.

# Speakers

## Brant Brown

President and COO, Westmount Realty Capital (Dallas)

Brant Brown serves as president for Westmount Realty Capital, a privately held, Dallas-based commercial real estate company that has achieved exceptional performance for more than 30 years. With an enhanced focus on company growth, Brant and founder Cliff Booth will continue to capitalize on the significant opportunities firm has identified in the marketplace while building on its exceptional track record of securing and closing lucrative off-market opportunities. Brant joined Westmount in 2015, serving as the firm's chief financial officer and chief operating officer. He has extensive experience safeguarding investor interests and excels in structured finance and accounting, capital markets, real estate investment performance, investor relations, information technology, marketing and corporate governance and planning. Brant is currently chair of Westmount's operating committee as well as a member of the investment committee. Brant has led the financial analysis and governance for more than \$30 billion in institutional real estate and fixed income investments. He began his career working with endowments and large institutional investors at Merit Energy, a private energy company with more than \$6 billion in portfolio investments. After Merit, he focused on real estate and private equity. He spent the next decade with Fortress Private Equity's Nationstar Mortgage, Invesco Real Estate and Ashford Hospitality

## Gideon Pfeffer

CEO and Managing Partner, GSH Group (North Palm Beach)

Gideon Pfeffer serves as the CEO and Managing Partner for The GSH Group, a full service real estate investment firm with a focus on existing residential multi-family apartment communities. Gideon is responsible for strategic partnership initiatives and ventures, equity and debt opportunities, overseeing investment performance, and approving decisions on investments and acquisitions. He also oversees daily operations. Under Gideon's leadership and direction, in the last four and a half years, the GSH Group has raised and placed over \$225 million of equity and assembled a portfolio of over 6,000 apartment units in five states, worth over a billion dollars.

## Vincent DiSalvo

Chief Investment Officer, Kingbird Investment Management (Boston)


As Chief Investment Officer, Mr. DiSalvo is responsible for sourcing and evaluating investment opportunities and implementing Kingbird's investment strategy. Prior to Kingbird, Mr. DiSalvo was a member of the acquisitions group at GID Investment Advisers LLC, a vertically integrated real estate investment/operating company and family office with over 25,000 units and \$20 Billion in assets under management. Mr. DiSalvo underwrote, due diligenced, structured and closed joint venture equity investment opportunities in both income producing multifamily assets and ground up development in multiple major U.S. markets for GID's family office and its institutional partners. Prior to GID, Mr. DiSalvo was part of the investment team at Equity Residential (NYSE: EQR), a \$30 billion real estate investment trust that develops/invests in multifamily real estate across major U.S. markets. He was responsible for analyzing, underwriting, and structuring apartment development and acquisition opportunities. Mr. DiSalvo has underwritten and contributed to the acquisition or development of more than 10,000 units and to the investment of more than \$1.5 Billion in multifamily real estate assets. Mr. DiSalvo earned his Masters in Real Estate Development from Columbia University and has a BS in Finance from Quinnipiac University. He is a member of the Urban Land Institute (ULI), the New York Private Equity Network (NYPEN), and the Real Estate Investment Advisory Council (REIAC).



# Speakers

## Thomas Carroll

### Founder & CEO, Ballast Rock Capital (Charleston)



Tom lives in the Southeast and has been an active real-estate investor for more than twelve years. He founded Ballast Rock and built the team needed to originate and manage both Sunbelt Fund I, Sunbelt Fund II, and the Louisiana Green Fuels fund. The Ballast Rock Sunbelt funds are focused on investing and managing workforce multifamily real estate investing in the South Eastern United States. The Ballast Rock team combines talented Wall St. professionals, experienced local real estate operators, and Tom's experience as a partner at Watermark Partners Real Estate where he led strategy and investor relations for the organization since early 2016. Tom uses his international finance experience to support the Ballast Rock growth strategy, with a particular focus on risk mitigation, operational excellence, investor relations, and regulatory compliance. Prior to working in real estate, Tom had a fourteen year Wall Street career. Most recently, he concluded nine years at Goldman Sachs & Co. as a trading desk head on the GS New York Fixed Income, Currencies and Commodities trading floor. His international career at both Goldman Sachs and HSBC, has led him to live and work in New York, London, Dubai, and Sao Paulo. He has headed multiple desks primarily focused on structured financing, complex transaction execution, and institutional investor marketing at Goldman Sachs. Tom received an MA (Hons) in Economics from the University of Edinburgh in Scotland.

## Juan Fernando Valdivieso


### Co-Founder/Managing Director, Peninsula Alternative Real Estate (Miami)



Mr. Valdivieso has been actively involved in real estate investing since 2004. Juan Fernando joined Peninsula in 2015 as Managing Director. At Peninsula, Juan Fernando is responsible for leading the firm's efforts in the US and Latin America in student and senior housing, in partnership with leading specialized developers. Prior to Peninsula, Juan Fernando founded and led various private equity, consulting and real estate companies, including Abu Dhabi Equity Partners, focused on investments in agribusiness and real estate in emerging markets, Gulf Housing Solutions, focused on staff and workforce housing in the UAE, Dubai Equity Partners, a US-based real estate investment company and Park Street Advisors, a boutique strategy consulting and private equity firm. Prior to that, Juan Fernando was a junior partner with McKinsey & Co. where he worked for 7 years. He earned his MBA from the MIT Sloan School of Management and his BA degrees in Economics & Business and International Affairs from Lafayette College. Juan Fernando was awarded the Wall Street Journal Achievement Award in Economics, as one of the top Economics undergraduates in the United States.

## Gino Cozza

### Founder & Chief Executive Officer, Whitestone (Toronto)



Gino has 15+ years of experience in real estate, private equity and investment banking. He was previously the COO of VCM Global Asset Management, an alternative investment firm, where he helped increase assets under management from \$100 million to \$1+ billion and directly managed the firm's capital markets, industrial real estate and private equity platforms. Gino holds a BA & MBA from York University.

# Speakers

## Rob Gritz

### CEO, Texas Global Equity (Austin)



Robert Gritz is the CEO of Texas Global Equity, a real estate private equity firm based in Austin, and of Texas Growth Fund, the exclusive EB-5 partner to the City of Austin. TGE and TGF have a 100% success record across six real estate private equity funds whose projects include three iconic downtown Austin towers. Mr. Gritz began his career on Wall Street in the Private Equity Group at Credit Suisse First Boston in 1987. He subsequently ran the in-house Investment Banking Office for 10x-billionaire John Kluge, ranked #1 on the Forbes 400 at the time. Across 35 years, Mr. Gritz has led dozens of large-scale investments, leveraged acquisitions, financings, re-financings and exits ranging from \$10 million to over \$1 billion. He has also led the successful turnaround of mixed-use, multifamily and public infrastructure construction projects (including the restructuring of tax-exempt bond, bank and mezzanine financings) in default. Mr. Gritz has deep expertise in advanced technology venture investment and development, addressing infrastructure, enterprise and consumer markets. He is a graduate of the University of Texas at Austin with Honors.

## Sasha Bernier

### Managing Director, Cheltenham Enterprises (New York)



Sasha Bernier is the Managing Director and Investment Committee Member of Cheltenham Enterprises, a single-family office seeking to invest opportunistically. Mr. Bernier is an active real estate and venture capital investor with a focus in finding technology opportunities that can scale in Southeast Asia. Previously, he served as the vice president of Revere Capital, a real estate debt fund with the responsibility for underwriting and structuring new investment opportunities in the real estate debt space. He started his career as a banker at Evercore Partners. Mr. Bernier holds a JD from the University of Pennsylvania Law School and a B.S. in business administration from the University of North Carolina at Chapel Hill.



# Pre-Event Networking Cocktail

Day 1- Monday, November 29<sup>th</sup>

Sponsored by:



**When:** Monday, November 29<sup>th</sup>

**Where:** W South Beach Wet Pool

**BarTime:** 6:00 pm EST – 8 pm EST

**Who:** Conference Attendees & Friends



# Agenda Outline

**TUESDAY**  
**NOVEMBER 30<sup>TH</sup> – DAY 2**

**7:30 am EST**

## Registration & Breakfast Networking

**8:25 am EST**

## Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

Mayor Dan Gelber, Mayor of Miami Beach

**8:30 am EST**

## Keynote Fireside: A Conversation with Orlando Bravo

Orlando Bravo, Founder of Thoma Bravo and Antonio Luis-Ferre Rangel, CEO of Kingbird Investment Management discuss the world of software, it's impact on real estate and philanthropic initiatives that promote entrepreneurship and economic development in their native homes of Puerto Rico.

**Keynote Speakers:**

Orlando Bravo, Founder & Managing Partner, Thoma Bravo

Antonio Luis Ferre-Rangel, CEO, Kingbird Investment Management

**9:15 am EST**

## Digital Gold Rush

How the rapidly evolving landscape in technology is changing the venture capital and private investment ecosystem

**Keynote Speakers:**

Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek; Managing Partner, Morgan Creek Digital

David Fann, Vice Chairman, Aksia

**10:00 am EST**

## Family Office Panel

A group of leading single and multifamily offices discuss their allocation appetite for direct and indirect real estate. How have their portfolios performed during the pandemic. Have they increased or decreased exposure to the asset class?

**Moderator:**

Daniel J. Healy, Chief Executive Officer, Civitas Capital Group

**Panelists:**

Luis Vicente D'Amato, Partner/ Portfolio Manager, Aston Capital Management

Nadav Goshen, Managing Partner, Vizcaya Capital

Rafael Alcantara-Lansberg, Chief Investment Officer & Managing Director, Harbor Ithaka



# Agenda Outline

**TUESDAY**  
**NOVEMBER 30<sup>TH</sup> – DAY 2**

**11:00 am EST**

## **Morning Networking Break**

**11:30 am EST**

## **A Chilean Investor's Perspective**

Continual political uncertainty across Chile has forced Family office investors, asset managers and developers to look north. On this session, investors will discuss what is currently happening in Chile and their appetite and parameters for real estate investment in the US.

**Moderator:**

**Jorge Escobar**, Managing Partner/ Co-CEO, **Black Salmon**

**Panelists:**

**Nicolas Sorensen**, Partner, **Quest Capital**

**Felipe Figueroa**, COO, **Independencia Asset Management**

**Pablo Massera**, VP of Real Estate, **FYNOSA**

**12:30 pm EST**

## **Panel- Light Industrial & Last Mile Logistics**

COVID-19 has accelerated online retail shopping trends and investors of logistics related industrial properties have directly benefitted. As this trend continues, how much opportunity is there for growth and is there risk of over development in the sector? Our panelists of leading real estate investment groups discuss their perspectives in the sector.

**Moderator:**

**Alex Abrams**, Managing Director, **StepStone Group**

**Panelists:**

**Adam Lotterman**, Co-CIO, **Bluerock Fund Advisor**

**Sean Dalfen**, President and Chief Investment Officer, **Dalfen Industrial**

**Martin Slusser**, Founder and Managing Partner, **Magellan Value Partners**

**Brant Brown**, President and COO, **Westmount Realty Capital**

**1:30 pm EST**

## **Networking Luncheon**



# Agenda Outline

**TUESDAY**  
**NOVEMBER 30<sup>TH</sup> – DAY 2**

**3:00 pm EST**

## **Panel – Residential Investment Opportunities**

Multifamily and Single-Family Rental Cash flow is king when it comes to Latin American investor interest hence there is no question why the residential rental sector is of extreme interest to this group of LPs. Real Estate experts on this panel discuss the resiliency of this asset class throughout the pandemic, investment opportunities across the sun-belt states and the growth and institutionalization of the single-family rental sector. Panelists also discuss Senior Housing and Student Living. Has the pandemic's disruption created opportunity in this sector?

### **Moderator:**

**Gideon Pfeffer**, CEO and Managing Partner, **The GSH Group**

### **Panelists:**

**Vincent DiSalvo**, Chief Investment Officer, **Kingbird Investment Management**

**Thomas Carroll**, Founder & CEO, **Ballast Rock Capital**

**Juan Fernando Valdivieso**, Co-Founder/Managing Director, **Peninsula Alternative Real Estate**

**Gino Cozza**, Founder & Chief Executive Officer, **Whitestone**

**Rob Gritz**, CEO, **Texas Global Equity**

**4:00 pm EST**

## **Hoops and Dreams: The Bhathal Story**

This fireside will explore building a family business, lessons learned, and what it's like running a basketball team.

Discussion will also include investing in different asset classes including real estate, technology, private equity and why opportunity zones can reignite America.

### **Interviewer:**

**Sasha Bernier**, Managing Director, **Cheltenham Enterprises**

### **Keynote Speaker:**

**Alex Bhathal**, Founder, **Revitate**, Co-Owner, **Sacramento Kings**

**5:00 pm EST**

## **Closing Remarks and Networking**





# Participation Options : **OPTION A**

## STANDARD PASS:

- **Pass**
  - 1 pass to full conference, event cocktail hours and networking sessions.
- **Networking App Access**
  - 1 pass to event networking app for 1 week.

Early Bird: \$1,500 USD- ENDS October 29<sup>th</sup>

Pre-Registration: \$1,700 USD- ENDS November 12<sup>th</sup>

Standard: \$2,000 USD

## COMPLEMENTARY:

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

## Conditions:

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



# Participation Options: **OPTION B**

## 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.
- **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.
- **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.

**\$12,500 USD**





# Participation Options: **OPTION C**

## 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
- **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.
- **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.

**\$15,000 USD**







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

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# Thank You

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