



# THE PRIVATE MARKETS MASSACHUSETTS MEETING

Fairmont Copley Plaza, Boston, MA  
June 5th, 2023



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# THE PRIVATE MARKETS MASSACHUSETTS MEETING

FAIRMONT COPLEY PLAZA, BOSTON, MA  
JUNE 5TH, 2023

Dear Colleague,

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

We look forward to hosting you in Boston.

Best,

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



# BY THE NUMBERS

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- \$3+ Trillion AUM in attendance
- 100+ Total participants
- 50+ Institutional & Private Wealth Investors
- 50+ Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking
- 1 Full day Conference
- 1 Networking Cocktail Mixer





# IN ATTENDANCE

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## C-Level Executives

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



# PREVIOUS SERIES SPONSORS



# INSTITUTIONAL PARTNERS





# 2023 SPONSORS



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



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



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.



Manifold is a market leading quantitative investment firm focussed on the cryptocurrency space. The founding teams' intent was to introduce investment funds that would generate superior, risk-adjusted rewards through cycles and do so in a steady and consistent manner. These high-sharpe strategies avoid the dramatic drawdowns characteristic of long-biased or high-beta strategies. To that end, Manifold has combined quants and engineers from traditional financial backgrounds with world-class on-chain developers, traders, and thinkers to create a deep and diverse talent pool that draws on all the skill sets required to outperform. The firm has a reputation for its proprietary node and MEV infrastructure, seamless navigation across centralized exchange and on-chain trading opportunities, and its unique, hybrid research model and low latency trading system. Our market-neutral investment strategy has outperformed most traditional assets and commodities throughout this turbulent year.





# 2023 SPONSORS



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



Founded in 2010, Star Mountain Capital is a lower middle-market direct lending manager focused on two investment strategies: 1) providing debt and equity capital to established, growing small and medium-sized companies; and 2) purchasing LP positions, generally at a discount, from other investors in lower middle-market funds. Star Mountain manages ~\$3.5 billion of AUM through funds and SMAs for some of the world's most sophisticated investors, including individuals, family offices, insurance companies, wealth managers, endowments / foundations, and public / corporate pension plans. Star Mountain is 100% employee-owned and 100% of employees share in the investment profits across 100+ team members and senior advisors/operating partners. Star Mountain's specialty is helping grow privately-owned businesses, both organically and through acquisitions, that have at least \$15 million of annual revenues and under \$50 million of EBITDA. Star Mountain has closed ~200 direct investments and 35+ secondary / fund investments since its inception.



Washington Harbour Partners LP, an investment firm that manages public and private investments. Washington Harbour has deep domain expertise in the areas of Software, Cybersecurity, Defense Technologies, Business and Government Services, and Sports/Media/Entertainment. The firm's LPs are corporate pensions, endowments, foundations, and strategic family offices. Based in Washington DC, Washington Harbour has a team of professionals from top hedge fund and private equity pedigrees (Viking Global, Silver Lake Partners, Vista Equity, Matrix Capital, Clayton Dubilier & Rice, Siris Capital etc) that value geographic and behavioral independence in their approach.



## Paul Karger

Co-founder & Managing Partner, Senior Real Assets Strategist, TwinFocus (Boston)

Paul partners with the firm's key clients to advise them through a broad range of complex business, financial & life decisions. Paul also leads the firm's direct investing efforts in private equity and real estate.



## Kenneth Munkacy

Senior Managing Director, Kingbird Investment Management (Boston)

As Senior Managing Director of Kingbird, Mr. Munkacy is responsible for creating and overseeing Kingbird's investment strategy, acquisitions, joint ventures, and investment management platform in the U.S. Since 2017, he led Kingbird's investment portfolio's growth into 8 states, with over 7,200 units in 32 properties. Mr. Munkacy has over 33 years of global real estate experience and has been involved in all aspects of real estate including acquisitions, development, finance, portfolio and asset management. Mr. Munkacy has led full service real estate investment and operating companies in 12 countries and 23 states and has overseen over \$3 billion in transactions. Mr. Munkacy received a BA in Economics – Government from Franklin and Marshall College and earned his Masters of City Planning at the University of Pennsylvania, with a concentration in real estate development/finance.



## William Ward

Partner & Managing Director, Real Estate, TwinFocus (New York)

Wil oversees the firm's Real Estate investing initiatives across various direct and fund investments at TwinFocus. He is responsible for sourcing and leading the diligence efforts of deals for TwinFocus' real estate portfolio as well as on an ad-hoc basis on behalf of the firm's clients. Wil manages the real estate team where he is responsible for overseeing the structuring and ongoing monitoring of investment opportunities across sectors including multi-family, hospitality, industrial and commercial. Wil works alongside executive management and the firm's Managing Directors to set macro investment policy as specifically related to real estate trends. Prior to joining TwinFocus, Wil was a Managing Director at Kimberlite Advisors where he was involved in a range of real estate advisory and capital raising transactions involving developers, owners, and operators of real estate assets across multiple sectors. Before working in an advisory role at Kimberlite, Wil began his real estate investing career with the real estate principal investing business of Lazard Alternative Investments where for 8 years he held roles at both the fund management level, as well as working with portfolio operating companies. Before joining Lazard, Wil began his post-MBA career as an Associate in GE Capital's Structured Finance Group, specifically in the Global Energy portfolio management area. Directly out of college, Wil was an officer in the United States Army where he served both domestically and internationally, achieving the rank of Captain before leaving to continue his education at Columbia Business School.



## Michael Elio

Partner, StepStone Group (New York)

Michael Elio is a member of StepStone's private equity team, leading the middle- and large-market buyouts and secondary funds sector teams. He is also involved in portfolio construction for many of the firm's largest advisory clients, SMA clients, and high-net-worth distribution platforms. Prior to joining StepStone in 2014, Mr. Elio was a managing director at ILPA, where he led programs around research, standards, and industry strategic priorities. Before that he was a partner and managing director at LP Capital Advisors, where he led the firm's Boston office and served as the lead consultant to North American and European institutional investors. Mr. Elio was the primary consultant for many of the firm's largest clients including public and private pension plans committing more than US\$5 billion annually. He held several progressive positions in private equity, including vice president at State Street Corporation and vice president at Credit Suisse First Boston Private Equity, where he oversaw the funds management group.



## Sarah Miller

Senior Vice President, Manager Research, Redington (United Kingdom)

Sarah works as a Senior Vice President in the Manager Research Team where she has a primary focus on private market strategies and specialises in impact investing. Sarah leads on Inclusion and Diversity within fund research and also chairs Redington's Inclusion & Diversity Committee. Sarah joined Redington in July 2019 having previously worked at BMO Global Asset Management and Janus Henderson. She is a CFA charterholder and holds a BSc (Hons) in Mathematics with Psychology from the University of Birmingham.



## Scott Simpson

Partner and Head of Credit, Bregal Sagemount (New York)

Scott Simpson is a Partner and Head of Credit at Bregal Sagemount. Scott has over 25 years of strategic advisory, leveraged finance and principal investing in over 100 transactions totaling over \$60 billion across sectors, with an expertise in Technology, Media and Telecom. Prior to joining Bregal Sagemount, Scott was an early investment team member, Partner, and Head of Originations at Brightwood Capital Advisors. Scott also held senior leadership positions in the Technology, Media, and Telecom groups of Donaldson, Lufkin & Jenrette, Credit Suisse, and Citigroup. Notably, Scott was a member of the Global Technology Council at Citigroup and led Emerging Communications, Enterprise, and Internet Infrastructure coverage at Citigroup and Credit Suisse. Scott started his career in the Worldwide Technology Group at Booz-Allen & Hamilton. Scott received a BS in Mechanical Engineering from the University of Maryland, College Park and an MBA from Columbia Business School.



## Anne Duggan

Managing Director and Client CIO, Partners Capital (Boston)

Anne Duggan is a Managing Director and Client CIO, responsible for working with both institutional and private clients. Prior to joining Partners Capital in 2017, she was a Director at Fidelity Investments focused on corporate strategy, an Investment Associate at Credit Suisse making private equity investments on behalf of institutional clients and an Investment Banking Analyst at Morgan Stanley. Anne received a BA with honours in Business Economics from Brown University and a MBA with distinction from the Tuck School of Business at Dartmouth. She is also a Trustee for the Riverbend Park Trust.



## Daniel Siegel

President, Stonehill CRE (Atlanta)

Daniel is president of Stonehill's commercial real estate lending group overseeing the group's expansion into commercial real estate lending. Before joining Stonehill, he was with Ardent Companies as managing director and the head of high-yield investments leading the company's debt investments. Prior to that, Daniel was vice president of acquisitions at Rialto Capital, overseeing the distressed loan acquisitions platform. During his tenure at Rialto, Daniel directly oversaw the acquisition of commercial real estate loans on domestic and international opportunities. Additionally, he developed the firm's small balance loan acquisition platform and led the company's first European acquisition. Daniel has a bachelor's degree in Finance from Tulane University.



## Zach Jackson

Principal, QIC (San Francisco)

Zach Jackson is a member of QIC's Global Private Capital leadership team focused on North American buyout and global secondary investments. Previously, Zach was a Principal at P4G Capital Management where he was responsible for sourcing, due diligence negotiations, deal structuring and portfolio company management. Zach also held positions as an investment professional at Context Capital Management and Allianz Global Investors. Zach earned an MBA from Rady School of Management at University California San Diego, and a Bachelor of Science from San Diego State University. He is also a CFA Charterholder.

## Tod Trabocco

Managing Director, Private Credit Strategist, Aksia (Boston)



Tod is a Managing Director on the Investment Research team and has over 25 years of industry experience. He is actively involved throughout the investment process including sourcing, screening and evaluating private credit primary, secondary, co-investment and SMA investments. Tod also works with the Portfolio Advisory team and Aksia's global institutional clients on portfolio strategy and construction and related investment advisory activities. Prior to joining Aksia in 2022, Tod was the Head of Product and Strategy at Industrial Transportation Equipment Management ("ITE"), where he assisted existing and prospective limited partners in underwriting and monitoring ITE's niche transportation asset offerings and designed bespoke co-investment vehicles for some ITE's largest clients. Before that, he led Private Credit manager research and selection globally at Cambridge Associates, working with advisory clients in launching, developing and monitoring private credit programs. In addition, he chaired the firm's Credit Investment Committee. Prior to joining Cambridge Associates, Tod worked at Kayne Anderson Capital Advisors and LBC Credit Partners (acquired by CIFC), a credit opportunities/direct lending fund where he led underwriting for almost a decade and sat on the firm's Investment Committee. Tod started his career at European Bank for Reconstruction and Development. Tod graduated from Pomona College with a BA in Government and holds a MALD in Development Economics from The Fletcher School, Tufts University and an MBA in Finance and Accounting from Columbia Business School. He is a CFA charterholder.

## Sean Gillespie

Principal, HarbourVest Partners (Boston)



Sean Gillespie joined HarbourVest in 2016 and focuses on private credit investments. He began his career in the Firm's direct investment team, where he focused on sourcing, reviewing, executing, and monitoring direct equity co-investments and junior credit investments. Sean joined the Firm from Canaccord Genuity in Boston, where he spent two years as a senior analyst and an associate in the Technology Investment Banking Group. Previously, he was an analyst in the Leveraged Finance group at Citizens Financial Group. He received a BA (magna cum laude) from the College of the Holy Cross in 2012.

## Jamie Rhode

Vice President, Verdis Investment Management (New York)



Jamie Rhode is Vice President at Verdis Investment Management, focused on venture capital, private equity and hedge fund investment sourcing and due diligence. She joined Verdis from Bloomberg, where she held roles in both equity research and credit analysis. There, she created, managed and leveraged an extensive library of statutory and financial and market data for buy and sell-side clients that use Bloomberg to make investment decisions. A licensed Chartered Financial Analyst, she earned her bachelor's degree in Finance and Marketing from Drexel University's College of Business Administration.



## Jeffrey Cho

Managing Director, Portfolio Advisors (New York)

Jeffrey J. Cho serves as a lead member of Portfolio Advisors real estate secondaries team, and a voting member of the firm's real estate Investment Committee. Prior to joining Portfolio Advisors, Jeffrey was a Vice President with Ramius LLC where he was engaged in acquisition, asset management and portfolio management activities of the commercial real estate equity and debt funds. Prior to Ramius, Jeffrey was an Analyst at The Carlyle Group. Jeffrey earned a B.S. from University of Southern California.



## Bob Shettle

Managing Director, Star Mountain Capital (Connecticut)

Mr. Shettle is a senior investment professional with approximately 30 years of experience investing senior debt, junior debt, private equity and making lower middle-market fund investments. Mr. Shettle had a highly successful 22-year career at Barings, the \$325 billion AUM investment manager owned by MassMutual Financial Group. At Barings he was promoted to Co-Head of North American Private Finance Group co-managing a team of 35 investment professionals across 3 U.S. offices and overseeing an approximately \$10 billion private credit investment portfolio. He was also Chairman of both the North American Mezzanine and the North American Private Finance investment committees. Mr. Shettle was also President of two Barings branded publicly traded New York Stock Exchange (NYSE) closed-end funds focused on private debt securities. Prior to Barings, Mr. Shettle was a Vice President in commercial lending at Fleet Bank (now part of Bank of America). Mr. Shettle started his career in management consulting at Andersen Consulting (now Accenture) in the late 1980s. Mr. Shettle is a graduate of the University of Connecticut and has an MBA from Rensselaer Polytechnic Institute. Mr. Shettle also holds the Chartered Financial Analyst (CFA) designation.



## Mario Miranda

Principal, GroveStreet (Boston)

Mario is a Principal at GroveStreet and focuses on fund and direct investment activities across sectors, including fund due diligence and analysis. He also is actively involved in analyzing and managing client portfolios alongside GroveStreet's Managing Partners. Prior to GroveStreet, Mario worked on Goldman Sachs's Leveraged Finance team in New York where he focused on structuring and executing financings primarily for middle-market leveraged buyouts. Previously, he worked at Citigroup's Financial Sponsors team where he advised private equity clients on identifying, structuring, and financing leveraged buyouts. Mario has also completed internships at UBS's New York-based Latin America Team and at Rent The Runway, where he worked with the CFO on evaluating growth opportunities and operational improvements, and gained a first-hand understanding of what it takes to scale a VC-backed company in a rapidly evolving space.

## Alena Kuprevich

Founding Partner & Managing Director, Disciplina Group, LLC (Nashville)



Alena Kuprevich is a founding Partner of Disciplina. Alena is responsible for sourcing, due diligence, portfolio construction and monitoring of all the illiquid alternatives. Alena is also on the Investment Committee for the firm. Previously, she held the position of Managing Director of Private Investments at Vanderbilt University's Office of Investments (2008 - 2013), which accounted for approximately 40% of the \$4 billion endowment portfolio. Prior to working at Vanderbilt, Alena worked with the FINRA and Emory University endowments. Over her career, she has committed over \$1 billion of capital globally to private investment firms. Alena holds a Bachelor of Business degree and a M.B.A. from Emory University (2000 and 2005). Alena is invited as a frequent speaker at various industry conferences along with maintaining numerous Investor Advisory seats for investment managers. Alena also is active with several non-profits including Family Services of Westchester.

## Todd Ruppert

Founder and Chief Executive Officer, Ruppert International (Owings Mills)



Todd Ruppert is a serial investor, advisor, and board member of start-up companies globally. He is the founder of Ruppert International, a firm with interest in numerous fields globally. He is the retired Global CEO of T. Rowe Price and the retired venture partner of Greenspring Associates. Todd sits on numerous boards including Shetland Space Centre, The Fine Art Group, Antler, London's Royal Parks, Culture3, the World Trade Center Institute, and the Rock & Roll Hall of Fame, among others. He was a board member of INSEAD Business School.

## Kenneth Brown

President, Lionchase (Washington DC)





# SPEAKERS



## Griffin Cotter

VP of Capital Markets, 29th Street Capital (Chicago)

Griffin Cotter heads investor relations at 29th Street Capital. Griffin is responsible for all new and existing equity relationships. Due to his background, he also will be involved in all financing decisions within the multiple business units at 29th Street Capital. Prior to this position at 29th Street Capital, Griffin spent 12 years at Freddie Mac in several different roles. Most recently, he served as Senior Director of the Central Region Production & Sales team. Griffin oversaw the Central Region offices in Chicago, Houston, and Austin, which produced over 700 loans for over \$15 billion in loan volume annually from 2020-2023. Griffin also was national head of the Production & Sales for Student Housing — developing strategy and overseeing all Student business. Finally, Griffin was head of the Freddie Mac Select Sponsor program. Griffin has a Bachelor of Science in Finance from Miami University.



## Mina Faltas

Founder and CEO, Washington Harbour Partners (Arlington)

Mina Faltas is the Founder and CIO of Washington Harbour Partners LP. Mr. Faltas was previously the Co-Founder, Co-Managing Partner, Co-Portfolio Manager, and Head of Research at Nokota Management LP, an event-driven investment firm that invested across the capital structure. Prior to founding Nokota Management, Mr. Faltas was a Senior Investment Analyst focused on the Technology sector at Viking Global Investors from 2008 to 2011 and, before that, held several positions at JPMorgan since 2000, most recently as a Vice President in the Property Positioning Business focused on the Technology sector. Mr. Faltas has a B.S. in Commerce (Finance) from the University of Virginia. He serves on the Board of Advisors of the McIntire School of Commerce at the University of Virginia, the Advisory Board of Diameter Capital Partners, the Board of Directors of Groundswell, the Board of Directors of aXiomatic Gaming, and the Board of Directors of Reconext.



## Tom Williams

Head of OCIO Investments, Morgan Stanley (New York)

Tom Williams, CFA, is the Head of Outsourced Chief Investment Office managing all investment advice and portfolio management for institutional clients. Tom has over 20 years of experience managing diversified portfolios as a Chief Investment Officer, Portfolio Manager, and Director of Research. Prior to joining the firm in June 2020, Tom was Chief Investment Officer and President of Pine Grove Asset Management, a multi-strategy fund of hedge funds. Tom held many senior positions at Pine Grove's predecessor, including Portfolio Manager and Director of Research, before executing a management buyout and assuming co-ownership. Following the acquisition of Pine Grove by Tom and his partner, Tom co-managed Pine Grove's business and led the investment team responsible for portfolio management, manager due diligence, and risk management. In 2014, he negotiated the sale of Pine Grove to the Man Group, a publicly traded London-based global investment manager, where he continued as Chief Investment Officer of Pine Grove and was a member of the investment committee for its multi-manager division overseeing \$17 billion of portfolios of hedge funds. Tom is a CFA charterholder, received his B.A. in economics from Trinity College in Hartford, Conn., and earned a law degree from the University of Southern California. He lives in Summit, New Jersey, with his wife and has two children attending college. Tom has served on a number of local boards including the Church of Amazing Grace and Summit Helping Its People, whose mission is to feed the homeless and at-risk homeless people in Summit.





## Mike Shi

Vice President in Investor Relations, Audax Private Debt (New York)

Mike Shi is a Vice President in Investor Relations at Audax Private Debt. Prior to joining Audax in 2022, Mike was a Director at ABR Dynamic Funds where he was responsible for building relationships with wealth management investors in the US. He also previously worked at Natixis Investment Advisors and Fidelity Investments. Mike received a B.S. from Carnegie Mellon University. Mike also holds the Chartered Financial Analyst(CFA) designation and Chartered Alternative Investment Analyst(CAIA) designation.



## Peter Grape

Principal, Lexington Partners (Boston)

Peter Grape is a Principal of Lexington Partners primarily engaged in the evaluation of secondary purchases of private equity and alternative investments. Prior to joining Lexington in 2013, Mr. Grape was an associate in private equity at AlInvest Partners and prior to that he was an analyst in corporate banking at Citigroup. Mr. Grape graduated from Duke University with a BS in economics and a BA in history.



## Matt Stoeckle

Director, Credit Strategies, Liberty Mutual Investments (Boston)

Matt Stoeckle is a Director in the Direct Lending & Distressed group within Global Private Investments at Liberty Mutual Investments (LMI), leading private credit investing. Matt joined LMI in 2013 as an Associate on the Opportunistic Investments team and in 2016 joined the newly formed private credit initiative. Direct Lending & Distressed invests across the private credit spectrum with a focus on niche opportunities that take advantage of both illiquidity and complexity premia throughout market cycles. Prior to joining LMI, Matt was an Associate with Avante Mezzanine Partners and began his career as a financial institutions investment banker with Wachovia Securities. Matt received his BS in Economics and BA in Business Administration with a Finance concentration from Elon University and his MBA from Georgetown University's McDonough School of Business.

# AGENDA OUTLINE

9:00 AM ET

## Registration & Breakfast Networking

Sponsored by:



10:00 AM ET

## Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

10:00 AM ET

## The Art of the Deal: A Fireside Chat with two top PE investors

Interviewer

Paul Karger, Co-Founder & Managing Partner, TwinFocus

Speaker:

Sean Gillespie, Principal, HarbourVest Partners

11:00 AM ET

## Private Credit Outlook

Private credit managers discuss how they have positioned their strategies to withstand high inflation and a potential recession. What are the best opportunities are they currently seeing across Direct Lending, Specialty Finance, Opportunistic, Distressed and Real Assets?

Moderator:

Mike Shi, Vice President in Investor Relations, Audax Private Debt

Panelists:

Bob Shettle, Managing Director, Star Mountain Capital

Tod Trabocco, Managing Director, Private Credit Strategist, Aksia

Scott Simpson, Partner and Head of Credit, Bregal Sagemount

Matt Stoeckle, Director, Credit Strategies, Liberty Mutual Investments

# AGENDA OUTLINE

12:00 PM ET

## Buyout & Secondaries

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

Moderator:

Tom Williams, Head of OCIO Investments, Morgan Stanley

Panelists:

Zach Jackson, Principal, QIC

Mario Miranda, Principal, GroveStreet

Peter Grape, Principal, Lexington Partners

Kenneth Brown, President, Lionchase

1:00 PM ET

## Networking Luncheon

Sponsored by:



2:00 PM ET

## OCIO Perspectives

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

Moderator:

Mina Faltas, Founder and CEO, Washington Harbour Partners

Panelists:

Sarah Miller, Senior Vice President, Manager Research, Redington

Anne Duggan, Managing Director and Client CIO, Partners Capital

Michael Elio, Partner, StepStone Group

Alena Kuprevich, Founding Partner & Managing Director, Disciplina Group, LLC MASSACHUSETTS MEETING



# AGENDA OUTLINE

3:00 PM ET

## US Real Estate Outlook

Moderator:

Griffin Cotter, VP of Capital Markets, 29th Street Capital

Panelists:

Ken Munkacy, Senior Managing Director, Kingbird Investment Management

William Ward, Partner & Managing Director, Real Estate, TwinFocus

Jeffrey Cho, Managing Director, Portfolio Advisors

Daniel Siegel, President, Stonehill CRE

3:45 PM ET

## Keynote Fireside: Start-Up, Venture and Rock & Roll

A conversation with Todd Ruppert, serial investor, advisor, and board member. Todd is the retired Global CEO, T. Rowe Price, and retired venture partner of Greenspring Associates. He sits on numerous boards including Antler, Shetland Space Centre, London's Royal Parks Foundation, INSEAD Business School, and the Rock & Roll Hall of Fame, among others.

Interviewer:

Jamie Rhode, Vice President, Verdis Investment Management

Keynote Speaker:

Todd Ruppert, Founder and Chief Executive Officer, Ruppert International

4:30 PM ET

## Cocktail Reception

Sponsored by:



5:30 PM ET

## End of Conference



# PARTICIPATION OPTIONS



# PARTICIPATION OPTIONS

## COMPLEMENTARY

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

### Conditions:

- Carmo carefully vets all participants to make sure they fit the LP criteria.
- Carmo has the right to refuse any participant from joining should they not meet the criteria
- If you raise external capital, you cannot join on a complimentary basis.
- If you wear two hats, you cannot join on a complimentary basis. (Example: You represent a family, but you also help a fund raise capital) Nope!
- If you are invited as an LP and are caught pitching a fund or deal, you will be banned from the Carmo platform. There is nothing wrong with raising capital, just be honest with us and your intentions. If you're not a true LP, you must pay to play.

## STANDARD PASS

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

Pre-Registration: \$1,500 USD **Ends May 26th**

Standard: \$2,000 USD



# PARTICIPATION OPTIONS

## ATTENDEE LIST SPONSORSHIP

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

**\$10,000 USD**

## CAP-INTRO SPONSORSHIP

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

**\$15,000 USD**

# PARTICIPATION OPTIONS

## SPEAKING SPONSORSHIP

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

**\$20,000 USD**

## PRESENTATION SPONSORSHIP

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

**\$30,000 USD**



## EXCLUSIVE TITLE SPONSORSHIP

- **Priority Brand Placement & Material Distribution**

- Sponsor's Corporate logo to be placed above and in a larger format on the conference brochure, agenda, website, banners and branded event advertisements
- Any research or marketing materials will be made available and/or distributed to all conference attendees.
- Sponsor to include a full-page advertisement to be placed on back cover of conference brochure.
- Sponsor logo and link to sponsor site to be included on a bi-weekly newsletter which will update all confirmed and prospective attendees of event progress.
- Sponsor to have all attendee lanyards with company logo.

- **Exclusivity**

- First access to conference attendee list 3 weeks prior to the event.
- Carmo will provide one on one introductions via email to all prospective clients of choice (funds/investors).
- On-site direction and introduction facilitation to prospective clients
- Dedicated private sponsor room for 1 on 1 meetings

- **Exclusive Sponsor Cocktail/Dinner**

- Carmo to help facilitate private cocktail party/dinner with selected investors night before the event

- **Speaking/ Moderating Positions**

- 2 Moderating/speaking or presentation positions on panel of choice. (first come first serve basis)

- **Company & Speaker Profiling**

- Company description to be published online and in print (150 words max)
- Speaker bio to be published online and in print (150 words max)

- **Conference passes**

- Up to 10 attendee passes for sponsor employee executives

**\$70,000 USD**



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

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