



# THE PRIVATE MARKETS MEXICO MEETING

St Regis Mexico City, Mexico  
October 25th & 26th, 2023



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# THE PRIVATE MARKETS MEXICO MEETING

ST REGIS MEXICO CITY, MEXICO  
OCTOBER 25TH & 26TH, 2023

Dear Colleague,

It is with great pleasure that I invite you to join us at the 2<sup>nd</sup> Annual Private Markets Mexico Meeting during F1 week in Mexico City. This exclusive institutional gathering brings together the most important and active institutional allocators and family offices in Mexico that are investing in Global Private Equity, Venture Capital, Secondaries, Private Credit and Real Assets. Over 150 C-Level LP & GP professionals will come together to network and discuss investment opportunities, allocations, and the performance of all Private Markets related asset classes.

We look forward to hosting you in Mexico City!

Best,

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





# BY THE NUMBERS

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- \$5+ Trillion AUM in attendance
- 150+ Total participants
- 75+ Institutional & Private Wealth Investors
- 75+ Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking/Speed Dating
- 2 Networking Cocktails





# 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 (AFORES)
- Fund of Funds
- Sovereign Wealth Funds
- Family Offices, Multifamily Offices and Private Banks
- Government officials
- Economists
- Banks and Investment Banks
- Lawyers
- Auditors
- Commercial Service Providers
- Private Debt Funds

# INSTITUTIONAL PARTNER



LEAD SPONSOR

**skyhaus<sup>®</sup>**







# 2023 SPONSORS



Black Creek Mexico is a leading private real estate investment management firm specializing in Mexican markets. Since 1996, BCM-affiliated investment platforms have developed or acquired and operated more than 175 industrial, retail, residential, and multifamily properties in Mexico, representing in excess of \$3 billion of aggregate transaction value. The firm seeks to generate attractive risk-adjusted returns for its investment partners through investments in scalable, secular strategies. With offices in Denver and Mexico City, BCM operates through a vertically integrated business model, combining direct local execution capabilities with an institutional investment management platform. Black Creek Mexico is actively pursuing opportunities in the multifamily, lodging, and industrial sectors in Mexico.



CIM is a community-focused real estate and infrastructure owner, operator, lender and developer. Since 1994, CIM has sought to create value in projects and positively impact the lives of people in communities across the Americas by delivering more than \$60 billion of essential real estate and infrastructure projects. CIM's diverse team of experts applies its broad knowledge and disciplined approach through hands-on management of real assets from due diligence to operations through disposition. CIM strives to make a meaningful difference in the world by executing key environmental, social and governance (ESG) initiatives and enhancing each community in which it invests. For more information, visit [www.cimgroup.com](http://www.cimgroup.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.



Cold Bore Capital is a Chicago based, U.S. Military veteran and minority owned (Managing Partner was born in Guadalajara, Mexico) lower middle market private equity firm focused on U.S. based services companies in the business, consumer, and healthcare space. CBC aims to create value by acquiring 5-10 small companies (\$500K-\$3.0 million of EBITDA per acquisition) to build leading platforms (\$10-\$30 million of EBITDA at exit) in high growth, recession resistant sectors. The partners of the firm and most of the overall team come from elite military units (Navy SEALs, Green Berets, Army Rangers, Fighter Pilots, etc.), which they think provides a competitive advantage from a deal sourcing and post-close value creation perspective. CBC is actively looking for co-investment on two portfolio companies in their second fund and for several new portfolio companies they intend to establish in their third fund. Please see attached for an overview of CBC and their two active co-investment opportunities, Regiment Security Partners and Pets Wellness Alliance.



## CVC

CVC is a leading private equity and investment advisory firm with a network of 25 offices throughout Europe, Asia and the US, with approximately €125 billion of assets under management. Since its founding in 1981, CVC has secured commitments in excess of €155 billion from some of the world's leading institutional investors across its private equity and credit strategies. Funds managed or advised by CVC are invested in over 100 companies worldwide, which have combined annual sales of approximately €100 billion and employ more than 500,000 people. For further information about CVC please visit [www.cvc.com](http://www.cvc.com).

## EVERCORE

Founded in 1869, the Goldman Sachs Group is a leading global financial institution that delivers a broad range of financial services to a large and diversified client base. For more than 150 years, a culture of teamwork and client service has defined our firm. Today, nearly 40,000 Goldman Sachs colleagues work together to serve our clients and communities around the world. Goldman Sachs is organized into three business segments: (i) Global Banking & Markets (ii) Asset & Wealth Management (iii) Platform Solutions. We provide investment and advisory services for the world's leading pension plans, sovereign wealth funds, governments, financial institutions, endowments, foundations, family offices and individuals, for which we oversee more than \$2.5 trillion in assets under supervision.

The logo for ff Venture Capital, featuring the letters 'ff' in a stylized font to the left of the text 'ff VENTURE CAPITAL', all enclosed in a green rectangular border.

ff Venture Capital (ffVC) is focused on investing in early-stage technology and technology-enabled companies, and has been since 2008. We invest across emerging industries with a strong focus on Enterprise Software, Industrial Automation, Sustainability and Fintech, through an AI & machine learning lens and where the team has deep domain expertise. We have invested in some of the most successful, high growth companies today including; Socure, Manna, Omaze, Rhino, Rescale, Stocktwits, and Addepar, taking a highly engaged approach to helping our founders build real companies with real business models, leading to higher survivorship. True to the founder friendly name, our approach, providing deep operational expertise and support, has resulted in a 15 year track record of ffVC portfolio companies graduating to Series B at a rate 5x the industry average. ffVC invests at the earliest stage of company formation with initial investments often as the lead investor and active Board participation. Because our funds stop investing at Series B, there are exceptional co-invest opportunities for our LPs.

## Goldman Sachs

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### Asset Management

Founded in 1869, the Goldman Sachs Group is a leading global financial institution that delivers a broad range of financial services to a large and diversified client base. For more than 150 years, a culture of teamwork and client service has defined our firm. Today, nearly 40,000 Goldman Sachs colleagues work together to serve our clients and communities around the world. Goldman Sachs is organized into three business segments: (i) Global Banking & Markets (ii) Asset & Wealth Management (iii) Platform Solutions. We provide investment and advisory services for the world's leading pension plans, sovereign wealth funds, governments, financial institutions, endowments, foundations, family offices and individuals, for which we oversee more than \$2.5 trillion in assets under supervision.



# SPONSORS



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



ICG provides flexible capital solutions to help companies develop and grow. We are a leading global alternative asset manager with over 30 years' history, managing c. USD75 billion of assets and investing across the capital structure. We operate across four asset classes: Structured and Private Equity, Private Debt, Real Assets, and Credit. We develop long-term relationships with our business partners to deliver value for shareholders, clients, and employees, and use our position of influence to benefit the environment and society. We are committed to being a net zero asset manager across our operations and relevant investments by 2040. ICG is listed on the London Stock Exchange (ticker symbol: ICP). Further details are available at [www.icgam.com](http://www.icgam.com).



K1 builds category leading enterprise software companies. As a global investment firm, K1 assists high-growth businesses achieve successful outcomes. K1 invests alongside strong management teams that continue to guide their organizations on a day-to-day basis. With over 150 professionals, K1 changes industry landscapes by assisting with operationally-focused growth strategies. Since inception of the firm, K1 has partnered with over 200 enterprise software companies including industry leaders such as Apttus, Buildium, Certify, Checkmarx, ChiroTouch, Chrome River, Clarizen, ControlUp, Granicus, IronScales, Jobvite, Onit, Rave Mobile Safety, RFPIO, Smarsh and WorkForce Software. For more information about K1, please visit <http://www.k1capital.com> or <http://www.linkedin.com/company/k1im>



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



# SPONSORS



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



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



Nauta is a pan-European venture capital firm investing in early-stage technology companies, with offices in London and Barcelona. With over half a billion assets under management and a team of 20 people, Nauta is one of Europe's largest B2B focused VCs. As a sector-agnostic investor, Nauta's main areas of interest include B2B SaaS solutions with strong network effects, vertically focused enterprise tech transforming large industries as well as those leveraging deep-tech applications to solve challenges faced by large enterprises. Nauta has led investments in more than 60 companies including Brandwatch, Nextail, Mercaux, Holded, Onna, MishiPay, LoyalGuru, AppFollow, ifeel and Cledara.



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



# SPONSORS



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



Pearl Energy Investments ("Pearl") is a Dallas, Texas-based investment firm founded in 2015 focused on the North American energy sector. The firm typically targets opportunities requiring \$25 million to \$150 million of equity capital with an emphasis on upstream energy. Pearl has \$1.9 billion of committed capital under management and most recently closed Pearl Energy Investments III, L.P. and its affiliate funds with over \$700 million in total commitments in March 2023.



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



Riverwood Capital invests in high-growth companies in the technology and technology-enabled industries. Riverwood offers a unique combination of operational, strategic, technology, and financial insight to portfolio companies that typically need growth capital and expertise to scale on a global basis. The firm seeks to invest in established businesses with a proven technology and business model, and the proper fit in terms of culture and values. Riverwood was founded in 2008 and has had the opportunity to invest in and support over 70 companies since inception, which have grown revenues at 45% per year on average during that period. The Firm has offices in Menlo Park, CA; Miami, FL; New York, NY; and São Paulo, Brazil. For more information, visit [www.riverwoodcapital.com](http://www.riverwoodcapital.com).





# SPONSORS



RockStep Capital is a privately held, full-service, vertically integrated real estate investment firm that owns and manages enclosed malls, open-air shopping centers, and institutional third-party retail assets. Headquartered in Houston, Texas, the company acquires and develops underperforming assets into relevant and vital properties that benefit the communities they serve. Over the past 25 years, RockStep Capital has built or acquired over 9 million square feet of shopping centers and currently holds more than 7.5 million square feet of assets in its portfolio. The firm's investment strategy focuses on cash-flowing investments for acquisition and repositioning, with an emphasis on assets that carry minimal risk and provide reliable returns to investors. RockStep's vertical integration of services, coupled with its innovative approach to retail property repositioning and revitalization, accelerates returns for investors on projects in major and secondary markets.



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



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.



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



# SPONSORS



Welsh, Carson, Anderson & Stowe is a leading U.S. private equity firm focused on two target industries: healthcare and technology. Since its founding in 1979, WCAS's strategy has been to partner with outstanding management teams and build value for its investors through a combination of operational improvements, growth initiatives, and strategic acquisitions. Over the past 40 years, the Firm has raised and managed funds totaling over \$33 billion.

## Juan Manuel Valle Pereña

CEO, AFORE Coppel (Mexico City)



CEO of Afore Coppel, the largest pension fund in Mexico (14 million customers), and US18 billion AUMs, leading a transformation process focused in the investment portfolio (expected to double in 4 years), customer experience and financial literacy. Shareholder and board member of DeepDive, a startup focused in data sciences and AI, independent board member Ubr Pagos (Uber's fintech company in Mexico) and advisor for a fund investing in education in Mexico and LATAM. Between Feb-17 and Jan-19 CEO of Afore XXI Banorte, pension fund with over US50 billion AUMs. Previously a career in government: Ministry of Social Development (CEO of DICONSA, largest retail network in Mexico and LATAM), Ministry of Foreign Affairs (Managing Director of the Mexican Agency for International Development Cooperation) and Ministry of Finance (Deputy Assistant Secretary for Banking, Securities and Savings, responsible for designing and implementing public policies to develop the Mexican Financial System, improving access to financial services, strengthening consumer protection and financial education). Participated, on behalf of the Ministry, in the Financial Stability Board, the G-20 Global Partnership for Financial Inclusion and the OECD Committee on Financial Markets. Between 1997 and 2003 he worked in the creation of the individual accounts pension system and the deposit insurance corporation as well as a development bank targeting rural areas. B.A. in Economics (ITAM 1993-1998) and Master in Public Affairs (Princeton University, 2001-2003).

## Francisco Alvarez-Demalde

Co-Founder & Managing Partner, Riverwood Capital (Miami)



Francisco Alvarez-Demalde is a Co-Founder and Managing Partner of Riverwood Capital. Founded in 2008, Riverwood manages \$5.9 billion and makes investments in high-growth technology businesses globally. Mr. Alvarez-Demalde has built Riverwood into a leading global technology investment firm, partnering with founders and management teams to scale companies from the \$10s of millions to the \$100s of millions or more in revenues. Prior to establishing Riverwood, Mr. Alvarez-Demalde was an investment executive at KKR, where he focused on leveraged buyouts in the technology industry and other sectors. He also previously held roles with Eton Park Capital Management and Goldman Sachs & Co. Mr. Alvarez-Demalde earned a Licentiate (Honors) in Economics from Universidad de San Andres, Argentina (including an exchange program at the Wharton School). He has led investments in or is a current or former Director or Advisor of several technology companies, including 99, Alog, Billtrust (Nasdaq: BTRS), Cloudblue, Dock, Globant (NYSE: GLOB), GOintegro, Greenhouse, Industrious, Insider, LAVCA, Mandic, MotionPoint, Navent, Nubox, Pixon, RD Station, SecurityScorecard, Shiphero, Technisys, VTEX (NYSE: VTEX), among others. Mr. Alvarez-Demalde is also a Global Ambassador with Endeavor and interested in non-profit initiatives related to education.



## Alberto Basave

Partner, StepStone Group (Dallas)

Mr. Basave is a member of the business development team, focusing on Latin America. Prior to joining StepStone in 2013, Mr. Basave co-founded Carmel Group, a private equity asset manager focused on primary, secondary, and co-investment transactions. Before that he worked for ORIX Finance where he underwrote and purchased participation via the primary and secondary markets in middle-market leveraged loan non-investment grade facilities nationally and managed a portfolio of institutional leveraged loan assets. Previously, Mr. Basave worked for Hunt Oil Company, where he sourced and evaluated direct private equity and real asset opportunities in Latin America. Mr. Basave earned a BS in mechanical and electrical engineering from Universidad Anahuac (Huixquilucan, State of Mexico) and a MBA from Southern Methodist University. Mr. Basave also holds a Graduate Certificate in Financial Engineering and Simulation Models from Universidad de Las Americas (Mexico City).



## Federico Cerdas

Co-Founder & CEO, Skyhaus, Partner, Cobra Carmo (Mexico City)

Mexican businessman co-founder of Skyhaus, Global Businesses Inc. and Cobra Development Fund. All 3 are leading Real Estate companies in Mexico and generate more than 1,000 direct jobs. Mr. Cerdas holds a bachelor's degree in Electrical and Mechanical Engineering by Instituto Tecnológico de Monterrey and a Master's Degree in Business Management by IPADE. He is also a graduate of Stanford's Construction, Engineering and Management program. He continuously takes part in the most important forums of his sector in cities such as, New York, San Francisco, Miami, London, and Mexico City, among others. From time to time he also makes editorial contributions to different media in Mexico and abroad.



## J David Enriquez

Partner, Clipway, Former Head of Private Equity, NYC Retirement Systems (New York)

David is a Partner and member of the founding team of Clipway. Prior to Clipway, David was a Managing Director at Rothschild Five Arrows. As Head of U.S. Origination, he sourced private equity deal flow across secondaries, primaries and co-investments. Before joining Rothschild, he was Head of Private Equity for the Bureau of Asset Management in the Office of the New York City Comptroller. In this role, he managed a \$23 billion private equity portfolio for the five New York City retirement systems (Teachers, Employees, Fire, Police and Board of Education) and successfully established a private equity co-investment program. Previously, he was an investment banker at Rothschild & Co, Merrill Lynch and Bear Stearns where he worked on financing and strategic advisory transactions. David began his career as an M&A lawyer at Sullivan & Cromwell. David holds an A.B. from Brown University, magna cum laude; an M.P.A. from Princeton University's School of Public and International Affairs; and, a J.D. from Columbia Law School, where he was a Harlan Fiske Stone Scholar.





## Salvador Almeida

Head of LatAm, Hamilton Lane (Miami)

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



## Ana Zarruk

Head of LatAm, Pantheon (Bogota)

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



## Greg Friedman

Managing Principal, Chief Executive Officer, Peachtree Group (Atlanta)

Greg has successfully led Peachtree in more than \$8.7 billion in hotel acquisitions, investments and development since co-founding the company in 2007. Greg has more than 24 years of hospitality experience with an emphasis on deal-structuring and financing. He was formerly Senior Vice President of Business Development for Specialty Finance Group, originating more than \$2.0 billion of hotel debt. Greg is a graduate of the University of Texas at Austin and is a board member of the American Hotel & Lodging Association. He also serves on the real estate fund advisory board for the Texas McCombs School of Business at the University of Texas at Austin, and he is a member of the Real Estate Roundtable, a nonprofit public policy organization based in Washington, D.C., that represents the interests of real estate.



## Rafael Benrey

Co-Chief Investment Officer, Investment Placement Group (San Diego)

Rafael heads IPG's Asset Allocation Strategy, Alternative Investment Strategy, and co-manages IPG Alternative Investments Fund. The Asset Allocation Strategy is composed of active investment funds and ETFs. The Asset Allocation strategy is global in nature and diversifies investors across debt, equity, and alternative markets. IPG has built a diversified portfolio of Private Alternative Investments that encompasses Private Debt, Private Equity, and Real Estate. IPG's Alternative Investment Fund is a diversified portfolio that invests across private markets and gives clients a diversified exposure with one easy to access fund. Before IPG, he worked at Cambridge Associates, the market leader in financial consulting to Endowments and non-profit institutions in the US, as an Associate Investment Director. Previously, he was a summer analyst at RBC Capital Markets and Societe Generale Private Banking. He holds a bachelors degree in Finance and Economics from Babson College and the CFA designation. In addition, he holds FINRA Series 7 and Series 66.



## Ken Shoji

Managing Director & Chief Investment Officer, View Capital Advisors, LLC (Dallas)

Ken Shoji is the Chief Investment Officer of View Capital Advisors, a wealth management firm in Dallas, where he is responsible for all aspects of the firm's investment program, including asset allocation, manager research and managing internal funds. Ken has 35 years of experience in asset management, investment banking and trading. Prior to joining View Capital, he founded Stissing Lake Advisors, an advisory firm for family offices; served as the Chief Operating officer of GSB Podium, a quantitative hedge fund; and managed the alternative investment business for Dresdner Kleinwort, an international investment bank. He has also held positions in derivative sales and trading at Deutsche Bank, Bankers Trust and J.P. Morgan, in New York, London and Tokyo. Ken is a CFA charter holder and graduated with a MA with Honours from the University of Edinburgh, where he serves on the Board of Regents, and earned a MBA from the Harvard Business School.



## Andy Weiner

President, RockStep Capital (Houston)

Andy Weiner, President of RockStep Capital, started RockStep Capital Corporation in 1996. Weiner has built or acquired over 9 million square feet of shopping centers throughout the United States. Prior to founding RockStep Capital, Weiner served as Vice President of Operations for Weiner Stores, a chain of 159 family clothing stores with locations in Mississippi, Louisiana, and Texas. A Stanford University graduate with a degree in Economics and Political Science, Weiner spent his junior year at the London School of Economics. He received his MBA from the University of Texas and completed Harvard University's business program for retailing executives.



## Jorge Di Donna

Senior Vice President, Spruceview Capital Partners (Mexico City)

Jorge has over 10 years of private markets investing, M&A, and corporate finance experience. Prior to joining Spruceview, he was the Head of Investments, Treasury and Financial Control at Seguros Sura México, responsible for portfolio strategy and for asset and liability management. Previously, he was the Deputy Head of Alternatives at Afore Profuturo where he led asset allocation for alternatives and private market investments across strategies in Mexico and international markets. Prior to that, he supported M&A and corporate finance initiatives at Grupo Bal, one of the largest business conglomerates in Mexico. Jorge holds a B.S. in Applied Mathematics from the Instituto Tecnológico Autónomo de México and a Master of Finance degree from Massachusetts Institute of Technology (MIT).



## Chase Chehade

Senior Vice President, Paramount Group (New York)

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



## Mary D'Souza

Managing Director, Star Mountain Capital (New York)

Mary D'Souza has 25 years of private equity, private credit, fund investing, commercial and investment banking and C-level operational experience through various senior roles including at GE Capital, Dresdner Kleinwort Benson, Four M Investments and a privately held pharmaceutical company. Ms. D'Souza spent nearly a decade as a Managing Director at GE Capital in the years leading up to the 2008/2009 global financial crisis where she structured over 125 senior and junior debt financings representing over \$13 billion+ in transaction volume. Ms. D'Souza also launched the junior debt initiative at GE Capital, building it into one of the leading players in the second lien / mezzanine lending market. She started her career as an investment banker at Dresdner Kleinwort Benson (since acquired by Commerzbank) in 1995. Post GE Capital, she was the Chief Investment Officer of a large New York family office responsible for direct investments in private equity and private credit transactions as well as fund investments across a variety of asset classes, including in the U.S. lower middle-market. Ms. D'Souza received an MBA from Pace University and completed GE's Accelerated Leadership Performance Course. She received a BA from St. Xavier's College. Ms. D'Souza is currently a Board Member of Community Access, a New York-based non-profit that provides a range of housing, job skills, and employment placement to those who have a history of mental illness.



## Hector Rosado

Head of Institutional Business, Compass Group (México)

Héctor is Head of Institutional Business in the Mexico City office, he has more than 10 years of experience in the financial industry and 7 years of experience as an institutional investor. During the last 3 years he was Senior Associate at Compass Group in the Institutional Business. Prior joining Compass, he held various roles at Afore Citibanamex, starting as a local fixed income analyst and subsequently Co-Portfolio Manager of fixed income, currencies, commodities, and their derivatives. Prior to that, he started his professional career as an equity and alternative investments analyst for Afore Azteca. Héctor holds a Degree in Finance from the Instituto Tecnológico Autónomo de México (ITAM)



## Justin McDougall

Managing Director, ICG Strategic Equity (New York)

Justin is a Managing Director at ICG and is part of the senior leadership group executing ICG Strategic Equity's investment strategy. He joined the firm at the inception of ICGSE in 2015 and, prior to ICG, was on the private equity secondary team at Morgan Stanley Alternative Investment Partners.



## Esther Rombaut

Managing Director, CVC Capital Partners (New York)

Managing Director, joined in 2012. Based in New York, Esther is a member of the Client & Product Solutions team and is responsible for communicating with clients in North America and Latin America. Prior to joining CVC, she was a partner at Mercury Capital Advisors, a global placement agent for private equity and real estate funds. Esther is a graduate of Université Paris IV, Panthéon-Sorbonne and received an MBA in Finance from Columbia Business School and an MIA from Columbia School of International and Public Affairs. Esther is a registered representative of CVC Funding, LLC.





## Fernando Espinosa Andaluz

Head of Analysis Alternative Investments, Sura (Mexico)

Fernando Espinosa has a long career in the financial sector. Currently, he is the Head of the Area of Analysis of Alternative Assets and Fibras in Sura. Previously, he was part of the risk team at Afore MetLife, specializing in credit and structured instruments. He graduated from ITAM with a degree in actuaría and has a diploma from IPADE in Corporate Entrepreneurial Capital and Open Innovation. Additionally, he has been certified by the European Federation of Financial Analysts Societies (EFFAS) on ESG.



## Ron Cano

Managing Partner, K1 Investment Management (El Segundo)

Ron Cano is a Managing Partner at K1 Investment Management and oversees the Firm's Diligence function and is a member of K1's Investment Committee. Mr. Cano is a graduate of the Stanford Graduate School of Business, where he received an MBA, and of Georgetown University, where he received a BS in Business Administration, cum laude. Mr. Cano has served as a director of numerous companies and is actively involved with the Robert Toigo Foundation, of which he is an alumnus.



## Alex Chi

Managing Director, Asset & Wealth Management, Goldman Sachs (New York)

Alex is Americas co-head of Private Credit within Goldman Sachs Asset Management. He was named co-chief executive officer and co-president of Goldman Sachs BDC, Inc. in 2022. He is a member of the Asset Management Private Credit Investment Committee, Specialty Lending Group Investment Committee and BDC Investment Committee. Alex also serves on the Americas Inclusion and Diversity Committee, the Asset & Wealth Management Inclusion and Diversity Council, is the head of the Asian Network in the Americas and is the firmwide recruiting captain for the Massachusetts Institute of Technology (MIT). Prior to joining Goldman Sachs Asset Management, he worked in the Financial and Strategic Investors Group (FSIG) within the Investment Banking Division from 2006 to 2019, where he managed the firm's relationships with private equity and related portfolio company clients. From 2000 to 2006, Alex was in Leveraged Finance, where he originated and executed leveraged loan and high yield financings for sponsor and corporate clients across all industries. From 1997 to 2000, he was based in Hong Kong, working on mergers & acquisitions, debt and equity financings, privatization and restructuring assignments for clients across Asia Pacific. Alex joined Goldman Sachs in 1994 as an analyst and spent his first three years at the firm across the Information Technology, Fixed Income Capital Markets and Leveraged Finance groups. He was named managing director in 2006 and partner in 2012. Alex serves on the Board of Directors for the JED Foundation and the Korean American Community Foundation. Alex earned a BS from MIT in 1994.

## Edgar Diaz Garcilazo

CEO, PENSIONISSSTE (Mexico City)



He has over 20 years of professional experience in the public sector, during which he has held managerial positions in various financial, economic analysis, and customer service areas, conducting himself with integrity, transparency, responsibility, and dedication. He served as an Advisor on Economic and Financial Matters in the Honorable Chamber of Deputies within the Budget and Public Accounts Committee and the Finance and Public Credit Committee. He was the Director of Macroeconomic and Sectoral Studies at the Center for Public Finance Studies in the Honorable Chamber of Deputies, and later became the Director-General of the same Center. He was appointed General Treasurer of the Institute of Security and Social Services for State Workers (ISSSTE) and served as Chief of Income Services at the Housing Fund of the Institute of Security and Social Services for State Workers (FOVISSSTE). He held the position of Deputy Director-General of Banking Operations at the Treasury of the Federation of the Ministry of Finance and Public Credit before rejoining the ISSSTE in 2019 as Normative Director of Economic, Social, and Cultural Benefits, a position he held until September 15, 2021. He currently serves as the Executive Chairman of the National Pension Fund for State Workers (PENSIONISSSTE). Bachelor's degree in Economics from the National Autonomous University of Mexico (UNAM); Master's in Economic Development and Economic Policy Analysis from the University of Southampton (Chevening Scholar). In addition to the above, he has completed a wide range of courses in economic and financial topics, such as Financial Derivatives, Investment Analysis, and the Implementation of Public-Private Partnership Projects.

## Rodrigo Roman Pastor

Chief Investment Officer, Partner, NSC Asesores (Mexico City)



Graduated with a degree in Engineering Physics from the Universidad Iberoamericana, where he was a member of the particle physics research team and also studied finance and investments. He was awarded with Academic Excellence, the university's highest designation. He decided to pursue Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA), which he completed on his first attempt and became a CFA Charterholder and CAIA Charterholder. He is also certified by the Mexican Association of Securities Intermediaries (AMIB) as an Investment Strategy Advisor. He has also completed courses and diplomas from different universities such as UT in Texas, Copenhagen Business School, Ludwig-Maximilians-Universität München (LMU), among others. He began his professional career in the Oil & Gas industry as an analyst, where he realized that his passion was finance, so in 2015 he decided to join NSC Asesores. He currently serves as Chief Investment Officer and partner of the company.

## Guillermo Zamarripa Escamilla

President, Asociacion Mexicana de Afores (Mexico City)



Es actualmente Presidente Ejecutivo de AMAFORE, profesor del ITAM, columnista del periódico Excelsior, comentarista en ADN 40 y consejero independiente de empresas. Entre 2011 y 2022 fue Director General de la Fundación de Estudios Financieros – FUNDEF, A.C. Entre 2005 y 2010 fue Jefe de la Unidad de Banca, Valores y Ahorro de la Secretaría de Hacienda y Crédito Público. En el sector público ocupó otras posiciones como la de Vicepresidente de Supervisión de Instituciones Financieras en la Comisión Nacional Bancaria y de Valores. Tiene una Maestría en Administración de Negocios de la Universidad de Chicago y las licenciaturas de Economía y Contabilidad del Instituto Tecnológico Autónomo de México. Las principales publicaciones en revistas académicas y capítulos de libros son: “Endeudándose en la Tarjeta de Crédito Incorrecta: Evidencia sobre el caso de México” (American Economic Review) y “Créditos Relacionados” (Quarterly Journal of Economics).



## Rodrigo González Montero

Managing Partner & CEO, CIO Investment Office (Santiago)

Before CIO investment office, he was CEO of Colunquén, a single-family office based in Chile. Former Head of Corporate Finance at Celfin WM and CIO at Inversiones Norte Sur, he worked more than 13 years at EuroAmerica, a financial group with presence in life insurance, asset management, financing and brokerage businesses. He was CEO of the asset management, brokerage and private banking and CIO of the life insurance company, with responsibility for the financial and real estate portfolios. He has been member of the board of companies in different areas, such as real estate, hospitality, healthcare, agribusiness, financial and higher education. He is member of several committees with the responsibility of overseeing private markets funds. He has completed several alternative assets programs such as the Private Equity Investment Certification at ILPA, the Stewardship Certificate from the Commonfund Institute and the Masterclass in Private Equity Certificate from the London Business School. He holds a BSc in Chemical Engineering from P. Universidad Católica de Chile, MSc in Finance from London Business School and attended the Advanced Management Program at Harvard Business School.



## Guadalupe Rodriguez

Chief Investment Officer, Talipot (Mexico City)

Ms. Guadalupe Rodriguez is the Chief Investment Officer of Talipot, a large single-family office based in La Jolla, California, with offices in Culiacan, Sinaloa, and Mexico City. In addition to her duties at Talipot, from time to time she serves as a strategic advisor to governments, companies, and high-net-worth individuals. She sits on various private and non-profit boards and is active in public policy circles. Her dedication to cultivating market settlers distinguishes her in the industry. Her prosperous career began in public service in Washington, DC, and led to government affairs and management consulting specializing in regulatory compliance and M&A. As a partner in the Firm she co[1]founded, her work with highly esteemed companies like Berkshire Hathaway and Bain Capital honed her skills as a successful investor, developing strategies and establishing new benchmarks for the industry. Guadalupe's savvy blueprint for success is evident in her dedication to developing new investment vehicles and other opportunities for all stakeholders involved. Her models are driven by her belief in public, private, and academic partnerships, profoundly considering the objectives of investors, shareholders, customers, and employees. With a focus on growing the pie, splitting the pie, and making more pies, she empowers all to grow in financial prosperity. Guadalupe's deep, life-long commitment to ESG, conscious capitalism, equality, inclusion, and democracy is the foundation for her unique capacity to transform businesses and individuals into valuable assets. She envisions a flourishing society where wealth is worth less than happiness.



## Billy Quinn

Founder and Managing Partner, Pearl Energy Investments (Dallas)

William J. Quinn is the founder and Managing Partner of Pearl Energy Investments. Prior to founding Pearl, Billy served as Managing Partner of Natural Gas Partners (NGP). In his capacity as Managing Partner, he co-managed NGP's investment portfolio and played an active role in the full range of NGP's investment process, from transaction sourcing through analysis, execution, and exit. Billy was also a key element in the firm's business development activities given his extensive industry contacts in the U.S. and Canada. Billy gained valuable investment experience working for Rainwater, Inc. and Hicks, Muse, Tate and Furst, Inc. He also worked as an Analyst in the investment banking divisions of Bear Stearns & Co. and BT Securities Corporation. In addition to his investing activities, Billy serves as a guest lecturer on private equity investing at Stanford University's Graduate School of Business and the Wharton School of the University of Pennsylvania. He also sits on the Wharton School Board of Overseers. Billy holds a B.S.E. in Finance, with honors, from the Wharton School of the University of Pennsylvania and an M.B.A. from the Stanford University Graduate School of Business.



## Josue Zarate

Chief Investment Officer, ABILIA (Mexico City)

Josue serves as Chief Investment Officer at Abilia. Over the past 15 years, he has held leadership positions in the investment and asset management functions at leading real estate funds such as Prudential Real Estate (now PGIM), Mexico Retail Properties, Equity International, O'Connor Capital Partners, and SURA Investment Management. Josue has extensive experience across various asset classes and throughout investment cycles including industrial, mixed use, retail, and residential asset classes. Josue holds a degree in Industrial Engineering from ITAM as well as a Master of Science in real estate with a specialty in Investments from New York University with distinction.



## Oliver Mitchell

Partner, ff Venture Capital (New York)

Oliver Mitchell is a partner at ff Venture Capital. Oliver first joined ff VC in 2014 as a Limited Partner, and then in 2018 as a Venture Partner. Today, he takes a leading role on the investment team in expanding the portfolio's deep tech position with holdings in robotics, drones, artificial intelligence, and industrial automation technologies. Oliver also works with ffVC's investor relations in forging strategic relationships for our limited partners and corporate venture groups. In addition, he serves on the boards of CivRobotics, Cambrian Intelligence, AppBind, Storyfit, and Cardflight. Previously, Oliver ran his own investment portfolio of a dozen companies that have since returned 8 exits, including two IPOs (NVCR and EKSO) and one unicorn (Triple Lift) with a combined value of over \$20 billion. Previous startup outcomes have included selling Holmes Protection to ADT/Tyco, AmeriCash to American Express, and launching RobotGalaxy, a national consumer S.T.E.M. brand. Oliver is an Adjunct Professor at Sy Syms School of Business, and frequent writer of trade periodicals.



## Carey Davidson

Partner, Managing Director & Head of Capital Markets, Monroe Capital (Chicago)

Ms. Davidson is a Managing Director and Head of Capital Markets of Monroe Capital. She is responsible for buy side club originations, relationship management, and marketing as well as sell side syndications. She joined the firm in 2015 and is a member of Monroe's Investment Committee. Ms. Davidson has over 25 years of experience in middle market investing. Prior to Monroe, Ms. Davidson was a senior deal professional at The Carlyle Group's middle market private debt platform, Carlyle GMS Finance, where she focused on originating, structuring, negotiating, executing and managing middle market loans. Prior to Carlyle, Ms. Davidson was a founding professional and Senior Vice President at Churchill Financial and an Assistant Vice President at GE Antares Capital. Ms. Davidson was recognized by Mergers & Acquisitions as one of 2017 and 2018's Most Influential Women in Mid-Market M&A. Ms. Davidson earned her M.B.A. from The University of Chicago Booth School of Business and her B.A. in Communications with a Certificate in Business from The University of Wisconsin – Madison. She is a member of the Association for Corporate Growth, the Women's Association of Venture & Equity, serves on the National Young Leadership Cabinet of the Jewish Federations of North America and serves on the Board of Directors of The Jewish United Fund.





## Carles Ferrer Roqueta

General Partner, Nauta Capital (London)

Carles Ferrer Roqueta is a General Partner at Nauta Capital and is based in London. Carles has extensive Venture Capital experience, having raised, managed and exited different VC funds since 2000. Carles' areas of interest include Security, SaaS, Marketing/Social Analytics/Intelligence and Critical data-driven companies. His previous experience includes also management positions in corporate strategy and planning/finance divisions with blue chip companies in the telecommunications, defence/SW/auto spaces and financial services, such as TRW (acquired by Northrop Grumman), Auna Group/Retevision (acquired by France Telecom and ONO) and Ernst & Young. Carles holds a Business Administration degree from Universitat de Barcelona, Graduate Programme in Administration and Management from Harvard University and an MBA from SDA Bocconi (Milan, Italy).



## Michael Hoverman

Principal, Infrastructure and Climate Strategy Solutions, CIM Group (Los Angeles)

Michael Hoverman is Principal at CIM Group and leads the Infrastructure and Climate Strategy Solutions team. He is responsible for building and structuring solutions for CIM's infrastructure and climate-related funds, co-investments and managed accounts. Prior to his role on the Strategy Solutions team, Mr. Hoverman led CIM's Global Partners Group, focusing on maintaining relationships with institutional investors worldwide. Mr. Hoverman currently serves on the Investment Committee and the ESG Committee at CIM Group. Mr. Hoverman earned a Bachelor of Arts degree in Economics and Philosophy from Bates College and a Master of Finance degree in Investment Banking from INSEAD.



## Greg Lau

General Partner and Co-Head of Fundraising, Welsh, Carson, Anderson & Stowe (New York)

Greg Lau has over 20 years of private equity experience. He is a General Partner and co-head of fundraising at Welsh, Carson, Anderson & Stowe, a leading U.S. middle-market private equity firm with \$15B assets under management. He was previously a Managing Director at FFL Partners and served in both investing and fundraising roles over 15 years. Prior to FFL, he was at Procter & Gamble. Greg currently serves on the Board of Directors of the Better Angels Society and is the Chairman and Co-Founder of the Sing for America Foundation. He graduated with honors from Harvard College with an AB in mechanical engineering and received an MBA from Harvard Business School.



## Ramon Fernandez

Vice President, Goldman Sachs Asset Management (Mexico)

Ramon leads Goldman Sachs Asset Management's client business in Mexico and Central America. He has over 15 years of experience in the Mexican financial sector providing investment solutions and advice to large institutional clients with a focus on private assets. Before joining GSAM in 2020, Ramon worked at Schroders Investment Management in Mexico as business relationship manager, focusing on growing the pension fund business. Previously, he worked at Deutsche Bank and UBS Mexico branches as part of their global markets and private banking units. Ramon attended Tecnológico de Monterrey where he received a BS in Engineering. Ramon serves in the Board of Directors for Goldman Sachs Casa de Bolsa.



## Carlo Lombardo

Country Head-Mexico, LarrainVial (Mexico City)



## Eduardo Sagues

Partner, Development, March Capital Management (San Francisco)

Mr. Sagues joined MCM in 2018 and is responsible for the acquisition, financing and project management of the firm's portfolio. Mr. Sagues co-oversees a team of project managers, conducting due diligence, entitlement, permitting and construction. Under Mr. Sagues direction, his team ensures the proper execution of each investment. Prior to joining MCM, Mr. Sagues was a Portfolio Director for a family office focused on hospitality real estate. In addition, he has held positions in accounting, finance, and consulting. Mr. Sagues holds a Master of Business Administration from the IE Business School, a Master of Advanced Management from Yale University School of Management, and a Bachelor of Science in Business Administration from the Universidad Autonoma de Madrid.



## Erick Hernandez

Managing Director, Capital Markets, Secured Debt Investments (Miami)

Mr. Hernandez is a financial executive with 20 years of experience in international finance, particularly Specialty Finance and Asset Based Lending across a wide range of asset classes. Prior to joining the SDI team to cover Capital Markets functions, he was a member of Atlantico Capital Partners, a boutique investment banking firm. Erick previously served as Managing Director, Head of Latin America Asset Based Lending for Alsis Funds, an investment manager with a structured credit investment thesis where he managed one of the firm's two divisions and was responsible for helping the firm grow from 1 investment and \$70MM capital commitment to 70+ transactions across 5 vehicles with \$340MM AUM of direct private credit investments in Latin America. He previously held positions at Standard Bank, Deutsche Bank and Bancomer, SA, focused on execution of Asset Backed Securities, Debt Capital Markets and Project Finance transactions.



## Sunil Vaswani

Head of Marketing & Client Relations, Americas, Intermediate Capital Group (ICG) (New York)

Sunil joined ICG in 2012 and is currently Head of Marketing and Client Relations for the Americas, based out of New York. As a Managing Director in ICG's global distribution team, he is responsible for investor relationships in Canada, the western United States, Mexico, South America and Israel. He was previously responsible for ICG's Middle East fundraising and client coverage, and opened ICG's office in Dubai. Prior to ICG, Sunil worked at Park Hill Group in London, the third-party fundraising arm of Blackstone, where he was a Director responsible for origination and private equity fundraising in Europe, MENA and India. Previously, Sunil was part of the Private Fund Group at Credit Suisse in London and focused on raising capital for Asia-based General Partners. Sunil started his career in investment banking with JPMorgan in New York. He graduated from Virginia Tech University with degrees in Finance and Accounting. Sunil was a founding member of the British Venture Capital Association (BVCA)'s Alternative Lending Committee. He is also a member of the Finance Advisory Board for the Pamplin College of Business at Virginia Tech.



## David Krauser

Principal, HarbourVest (Boston)

David Krauser joined HarbourVest in 2019 as a product specialist focused on direct co-investments and works closely with both the investment and investor relations teams. David joined the Firm from Porchlight Equity, a lower middle market private equity platform focused on consumer and business services investment opportunities. He was a managing director while at Porchlight Equity focused on all aspects of the investment and fundraising process. His prior experience includes roles at Highland Consumer Partners, CapitalSource Finance, and Wellington Management. David received a BA in Economics and Law, Jurisprudence and Social Thought from Amherst College in 2002.



## Vanessa Quiroga

Limited Partner, 500 Global (Mexico City)

Vanessa Quiroga, CFA, is a recognized thought leader in the financial industry with extensive experience in macroeconomic analysis, global financial markets, as well as ESG trends and how they impact the intrinsic value of companies across various industries. In her role at Credit Suisse, Vanessa led coverage of the metals & mining, cement & construction, and real estate sectors across the Latin America region. Her ability to adapt her analytical skills to different industries and countries is one of her key assets, enabling her to gain high credibility with investors and clients. Vanessa's distinguished career has led her to be recognized as one of the top analysts in the Latin American cement and construction sector by Institutional Investor magazine. Additionally, during her career she has been involved in 18 capital offerings, totaling USD 12 billion. In addition to her achievements in the financial field, Vanessa is a co-founder of Women in Finance, a non-profit organization that aims to provide the necessary tools for other women in the Mexican financial industry to advance in their careers. Vanessa also serves as a mentor in the entrepreneurial community, drawing on her experience in capital markets and fundraising.



## José Ignacio Armendáriz

Founding Partner and CEO, Capella Wealth Management (Mexico City)

Jose Ignacio earned a Bachelor's degree in Public Accounting from the Universidad Iberoamericana in 1994. Since 2022, he has been serving as a founding partner and President of Capella WM. He also holds positions as a board member at Compass Group, a fund operator, and investment advisor with over \$30 billion USD in assets under management. Additionally, he serves as a board member at CCLA, a company dedicated to the development of rental properties with over one trillion dollars in investments. With more than 33 years of experience in the financial sector, he began his career as a financial advisor at Casa de Bolsa Inverlat in 1990, where he progressed to establish and manage the Independent Advisors division, achieving an absolute leadership position in the Mexican market that continues to this day. In the year 2000, he assumed the role of Sales Director at Compass Group, overseeing assets totaling \$80 million USD. In 2022, as a Partner and CEO, he departed Compass, leaving behind a legacy of advising on assets exceeding \$8 billion USD, with \$3 billion USD invested in alternative assets.





# PRE-EVENT NETWORKING COCKTAIL

Wednesday, October 25th

5:30pm – 8:30pm CT

Location: Toledo Rooftop

Av Chapultepec 461, Juárez, Cuauhtémoc,  
06600 Ciudad de México, CDMX

Sponsored By:

**ICG**



# AGENDA OUTLINE

7:30 AM CT

## Registration & Breakfast Networking

Sponsored by:



8:30 AM CT

## Opening Remarks

Nicolas Rodriguez, Vice President, Carmo Companies

Guillermo Zamarripa Escamilla, President, Asociacion Mexicana de Afores

8:40 AM CT

## Keynote Presentation: Building a Better Mexico

Keynote Speaker:

Federico Cerdas, Co-Founder & CEO, SkyHaus, Partner, Cobra Carmo Group

9:00 AM CT

## Mexican Institutional Investor Perspectives

Moderator:

Arturo Medina Magaldi, Executive Director, BBVA Bancomer

Panelists:

Fernando Espinosa Andaluz, Head of Analysis Alternative Investments, Afore Sura

Edgar Diaz Garcilazo, CEO, PENSIONISSSTE

Alberto Basave, Partner, Stepstone Group



# AGENDA OUTLINE

10:00 AM CT

## AM Networking Break

Sponsored By: **Goldman Sachs**

Asset  
Management

10:30 AM CT

## Private Credit: The Golden Era

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

Moderator:

Sunil Vaswani, Head of Marketing & Client Relations, Americas, **Intermediate Capital Group (ICG)**

Panelists:

Alex Chi, Managing Director, Asset & Wealth Management, **Goldman Sachs**

Mary D'Souza, Managing Director, **Star Mountain Capital**

Carey Davidson, Partner, Managing Director & Head of Capital Markets, **Monroe Capital**

Erick Hernandez, Managing Director, Capital Markets, **Secured Debt Investments**

11:30 AM CT

## Private Equity: Middle Market, Buyout & Secondaries

On this session leading institutional investors and fund managers talk about their buyout and middle market strategies in the current environment. What do investors need to see to get comfortable with a deal right now? At the portfolio level, how has the market environment impacted allocation? 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:

Carlo Lombardo, Country Head-Mexico, **LarrainVial**

Panelists:

Justin McDougall, Managing Director, **ICG Strategic Equity**

Esther Rombaut, Managing Director, **CVC Capital Partners**

Ron Cano, Managing Partner, **K1 Investment Management**

Greg Lau, General Partner and Co-Head of Fundraising, **Welsh, Carson, Anderson & Stowe**

# AGENDA OUTLINE

THURSDAY  
October 26th

12:30 PM CT

## Networking Luncheon

Sponsored by:



1:30 PM CT

## Keynote Fireside Chat: State of the Private Markets

Keynote Speakers:

Francisco Alvarez-Demalde, Co-Founder & Managing Partner, Riverwood Capital

Juan Manuel Valle Pereña, CEO, AFORE Coppel

2:00 PM CT

## The State of US Real Estate

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

Moderator:

Chase Chehade, Senior Vice President, Paramount Group

Panelists:

Greg Friedman, Managing Director, CEO, Peachtree

Andy Weiner, President, RockStep Capital

Josue Zarate, Chief Investment Officer, ABILIA

Eduardo Sagues, Partner, Development, March Capital Management

2:30 PM CT

## Real Asset Spotlight: Infrastructure & Energy

Leading investment firms discuss how an allocation to real assets provides a compelling investment narrative. What has been the journey and evolution of Afores in this sector?

Moderator:

David Krauser, Principal, HarbourVest

Panelists:

Billy Quinn, Founder and Managing Partner, Pearl Energy Investments

Michael Hoverman, Principal, Infrastructure and Climate Strategy Solutions, CIM Group

Hector Rosado, Head of Institutional Business, Compass Group

THE PRIVATE MARKETS MEXICO MEETING



# AGENDA OUTLINE

3:00 PM CT

## PM Networking Break

Sponsored by:



3:30 PM CT

## LP & GP Perspectives on Growth & Venture

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

Moderator:

Vanessa Quiroga, Limited Partner, 500 Global

Panelists:

Guadalupe Rodriguez, Chief Investment Officer, Talipot

Carles Ferrer Roqueta, General Partner, Nauta Capital

Oliver Mitchell, Partner, ff Venture Capital

4:00 PM CT

## OCIO Perspectives

Leading Outsourced Chief Investment Officers discuss their roles in working with Mexican LPs to invest in global alternatives.

Moderator:

Ramon Fernandez, Vice President, Goldman Sachs Asset Management

Panelists:

Jorge Di Donna, Senior Vice President, Spruceview Capital Partners

Salvador Almeida, Head of LatAm, Hamilton Lane

Ana Zarruk, Head of LatAm, Pantheon

Rodrigo González Montero, Managing Partner & CEO, CIO Investment Office



# AGENDA OUTLINE

5:00 PM CT

## Mexican Family Office Perspectives

Mexican family offices discuss their allocation strategy for the private markets globally. How has local political uncertainty impacted appetite to diversify outside of Mexico. Alternatively, do they see local investment opportunities arise with the increase of nearshoring. What appetite do they have for direct vs. indirect investment? What are the main themes that drive family investment decision making? Panelists opine on impact related investment strategies.

Moderator:

J David Enriquez, Partner, **Clipway**, Former Head of Private Equity, **NYC Retirement Systems**

Panelists:

Rafael Benrey, Co-Chief Investment Officer, **Investment Placement Group**

Ken Shoji, Managing Director & Chief Investment Officer, **View Capital Advisors, LLC**

Rodrigo Roman Pastor, Chief Investment Officer, Partner, **NSC Asesores**

José Ignacio Armendáriz, Founding Partner and CEO, **Capella Wealth Management**

5:45 PM CT

## Cocktail Reception

Sponsored by:



6:45 PM CT

## End of Conference







PARTICIPATION OPTIONS



# PARTICIPATION OPTIONS

## COMPLIMENTARY

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

### Conditions:

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

## STANDARD PASS

- **Pass**

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

~~Early Bird: \$1,500 USD~~ **Ends August 25th**

~~Pre-Registration: \$2,000 USD~~ **Ends September 29th**

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



# PARTICIPATION OPTIONS

## ATTENDEE LIST SPONSORSHIP

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

**\$10,000 USD**

## CAP-INTRO SPONSORSHIP

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

**\$12,500 USD**

# PARTICIPATION OPTIONS

## SPEAKING SPONSORSHIP

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

**\$15,000 USD**

## PRESENTATION SPONSORSHIP

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

**\$25,000 USD**

## EXCLUSIVE TITLE SPONSORSHIP

- **Priority Brand Placement & Material Distribution**

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

- **Exclusivity**

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

- **Exclusive Sponsor Cocktail/Dinner**

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

- **Speaking/ Moderating Positions**

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

- **Company & Speaker Profiling**

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

- **Conference passes**

- Up to 10 attendee passes for sponsor employee executives

**\$50,000 USD**





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

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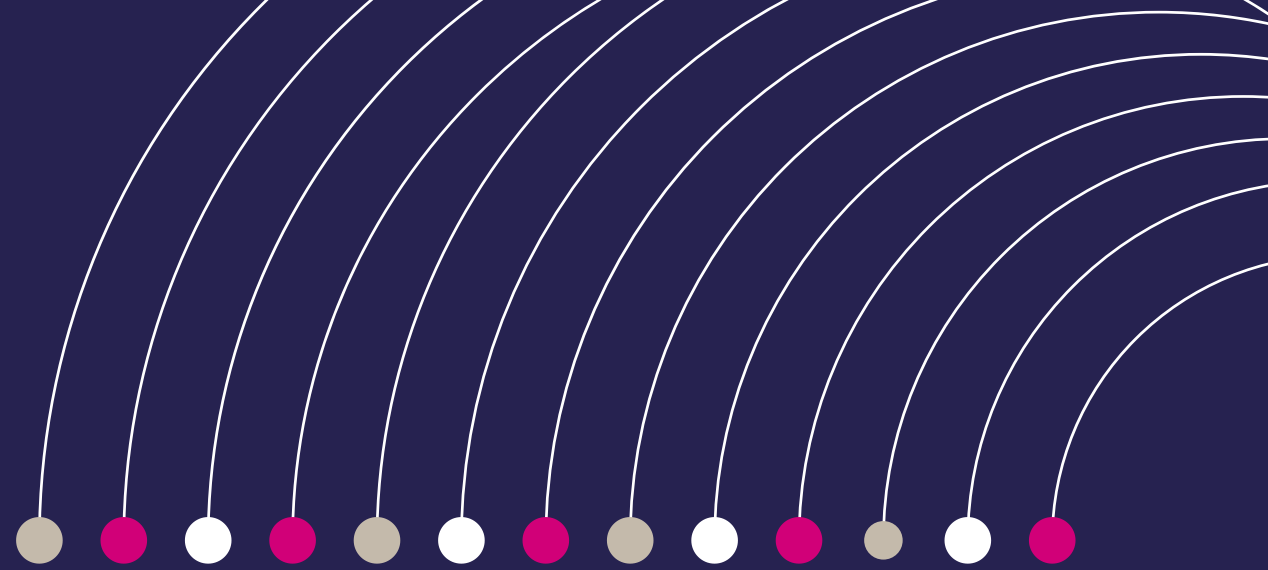
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