CARMO COMPANIES

Private Markets Diversity Web Meeting

ZOOM & SLACK

August 13th and 14th, 2020

LIVE ONLY, RECORDING IS PROHIBITED
BUSINESS CASUAL ATTIRE

TOIGO
Bringing Diversity to Life

Private Markets Diversity Web Meeting

ZOOM & SLACK– August 13th and 14th, 2020

Dear Colleague,

It is great pleasure that I invite you to the Private Markets Diversity Web Meeting. Recent acts of inequality and social injustice have highlighted an importance to level the institutional playing field for people of different backgrounds, genders, and ethnicities. The aim of this Web Meeting is to connect and educate private equity/venture capital/real estate funds, family offices, institutional investors, and other industry professionals across the United States. Our online meeting brings together over 300 c-level executives that will join us to virtually network and discuss issues and solutions to inequality in the private markets. Panel discussions to be covered include: Diversity & Inclusion – Real Estate, Diversity & Inclusion – Private Equity, Diversity & Inclusion – Venture Capital.

This is a live event and closed to the media. Video and audio recording of this event is strictly prohibited.

We look forward to hosting you digitally!

Best,

Roy Carmo Salsinha
President, CEO
Carmo Companies

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CARMO CONNECT

Agenda Outline

THURSDAY, AUGUST 13TH – DAY 1

1:00 pm EDT

Welcoming Address

Roy Salsinha, President, CEO, Carmo Companies

Sue Toigo, Chairman, Fitzgibbon Toigo & Co.

1:05 pm EDT

Diversity & Inclusion – Real Estate

Panelists discuss why they believe that real estate investors should focus on diversity both on their teams and in their investment portfoliios? What is their organization doing to achieve more diversity? How can fund managers change any unconscious biases when hiring & promoting? How can GPs and LPs change any unconscious biases when looking for/selecting deals? What do they think the biggest hurdles are for increasing capital flows to more diverse managers? What concrete recommendations would they have for GP's and LP's who want to seek to see increased diversity in Real Estate? Panelists will reflect on their own personal experiences and what influenced their paths to success.

Moderator:

Nancy I. Lashine, Managing Partner & Founder, Park Madison Partners

Panelists:

Deborah L. Harmon, Co-Founder and Chief Executive Officer, Artemis Real Estate Partners

Julie Donegan, Portfolio Manager, California State Teachers' Retirement System

Sonny Kalsi, CEO, BentallGreenOak

Maurice J. Coleman, Deputy Chief Investment Officer, Teachers' Retirement System of Louisiana

Yvonne Nelson, Head of Real Estate, New York City Office Of The Comptroller

2:15 pm EDT

15 Minute Break

CARMO CONNECT

Private Markets Diversity Web Meeting

Agenda Outline

THURSDAY, AUGUST 13TH – DAY 1

2:30 pm EDT

Diversity & Inclusion – Private Equity

Panelists discuss why investors believe they should focus on diversity both on their teams and investment portfolios? What are the biggest hurdles for increasing capital flow to more diverse managers? How are investors holding their managers accountable? The terms diversity and inclusion/sponsorship are often used together in today's discussion, but as we know these are two separate but related issues. What do they ask in their underwriting process? Do investors factor diversity and inclusion for every separate investment product or do they require every investment to check the box? What recommendations would panelists have for GP's and LP's who want to see increased diversity in PE?

Moderator:

Bhavika Vyas, Managing Director, **StepStone Group**

Panelists:

Lara Banks, Managing Director, **Makena Capital Management**

Ray Whiteman, Co-Founding Partner, **Stellex Capital Management**

Jason R. Howard, Managing Director, Investments, **GCM Grosvenor**

Carlos Monfiglio, Co-Head Private Equity, **State Street Global Advisors**

Gabrielle Zadra, Senior Managing Director, **Cliffwater LLC**

3:45 pm EDT

15 Minute Break

CARMO CONNECT

Agenda Outline

THURSDAY, AUGUST 13TH – DAY 1

4:00 pm EDT

Diversity & Inclusion – Venture Capital

In their own way, panelists of leading institutional investor and VC professionals discuss how each have either a built an incredible business or defied the odds to reach the top of the corporate ladder. How they succeeded at times and in ways the doubters would have questioned their judgment. How did they transform their visions into realities. What are some lessons that the Venture Capital industry can learn in order to achieve more diversity? How can GPs and LPs change any unconscious biases when looking for/selecting deals.

Moderator:

Debra Draughan, Managing Partner, **Top Capital Advisors**

Panelists:

Alberto Yepez, Managing Director, **ForgePoint Capital**

David Fann, Vice Chairman, **Aksia**

JoAnn H. Price, Co-founder/ Managing Partner, **Fairview Capital Partners**

Rodney June, Chief Investment Officer, **LA City Employees' Retirement System**

Agenda Outline

THURSDAY, AUGUST 13TH – DAY 1

Private Markets Diversity Web Meeting

5:15 pm EDT

How Commonfund is Growing its Diverse Managers Program

Commonfund President & CEO Mark Anson will be joined by Caroline Greer, Managing Director and former chair of the Diversity and Inclusion Office, to talk about how diversity in the financial services industry has evolved, where it stands now and what Commonfund is doing to incorporate diversity into its private programs and investment portfolios.

Keynote Speaker:

Mark Anson, PhD, CFA, CAIA, CEO and Chief Investment Officer, Commonfund

Interviewer:

Caroline Greer, Managing Director, Commonfund

6:00 pm EDT

End of Day 1

CARMO CONNECT

Private Markets Diversity Web Meeting

Agenda Outline

FRIDAY, AUGUST 14TH – DAY 2

3:00 pm EDT

Real Estate- Virtual Networking/Speed Dating

2 randomized 30-minute breakout sessions of 5 people. Web Cam is mandatory.

Notable Attendees Include:

Tarrell V. Gamble, Senior Vice President, **Blaylock Van, LLC**
Amy Cummings, Partner, **Park Madison Partners**
Thomas Clancy, CIO, **Pennsylvania Treasury**
Jennifer Stevens, Co-Founder & Managing Partner, **Alliance Global Advisors**
Chad Carpenter, Chairman & CEO, **Reven Capital**

4:00 pm EDT

Private Equity- Virtual Networking/Speed Dating

2 randomized 30-minute breakout sessions of 5 people. Web Cam is mandatory.

Notable Attendees Include:

Brad Woolworth, Manager of Private Equity – Domestic, **New York State Teachers' Retirement System**
Qingxi Wang, Managing Senior Research Analyst, **Alan Biller and Associates**
Brian T. Neale, Vice President of Investments, **University of Nebraska Foundation**
Robyn Slutzky, Co-Head Private Equity**, JP Morgan Private Bank**

5:00 pm EDT

Venture Capital- Virtual Networking/Speed Dating

2 randomized 30-minute breakout sessions of 5 people. Web Cam is mandatory.

Notable Attendees Include:

Sarah E. Hinman, Senior Consultant, **DiMeo Schneider & Associates**
Kimmy Paluch, Founder and Managing Partner, **Beta Boom**
Debra Draughan, Managing Partner, **Top Capital Advisors**
Venktesh Shukla, General Partner, **Monta Vista Capital**

6:00 pm EDT

End of Day 2

CARMO CONNECT

Event Beneficiary

TOIGO

Bringing Diversity to Life

Toigo's mission is to transform the performance of forward-thinking organizations through education and strategies that drive greater inclusion and the ongoing development and promotion of exceptional diverse leaders

Institutional Partner

ilpa

INSTITUTIONAL LIMITED PARTNERS ASSOCIATION

The Institutional Limited Partners Association (ILPA) engages, empowers and connects limited partners to maximize their performance on an individual, institutional and collective basis. With more than 450 member institutions representing over $2 trillion USD in private equity assets under management, ILPA is the only global organization dedicated exclusively to advancing the interests of LPs and their beneficiaries through best-in-class education, research, advocacy and events. For more information, please visit ILPA.org.

Sponsors

Adams Street Partners is a global private markets investment manager with investments in more than thirty countries across five continents. Drawing on 45+ years of private markets experience, proprietary intelligence, and trusted relationships, Adams Street strives to generate actionable investment insights across market cycles. Adams Street is 100% employee-owned and has approximately $41 billion in assets under management. Adams Street has offices in Beijing, Boston, Chicago, London, Menlo Park, Munich, New York, Seoul, Singapore, and Tokyo. adamsstreetpartners.com

AIC Capital is an Institutional Platform that provides Institutions, Family Offices and Ultra High Net Worth Individuals with Intellectual Capital and Access to Best-in-Class Alternative Investment Solutions. Our proprietary and unique database enables us to provide our clients with differentiated services and opportunities.

Belay Investment Group, LLC (Belay), is a real estate investment management firm that pursues value-added real estate strategies designed to maximize risk-adjusted returns to institutional investors. Belay utilizes the investment platform established by its affiliate, AVP Advisors, LLC (AVP) that has evolved over the past 10+ years while navigating investment activities through the Global Financial Crisis (“GFC”) to protect investor capital. Belay implements its investment strategies through long term partnerships established with high caliber, local operating partners and sector specialists. The firm has earned a reputation in the industry for supporting the growth and development of operators and emerging managers (including MWBE firms), beyond simply providing investment capital.

Sponsors

Beta Boom is a venture academy that provides hands-on, active coaching and expert services to enable early-stage tech founders to execute efficiently and scale their companies for the long-term. We primarily invest in overlooked startup founders – immigrants, women, minorities – who are commonly underrepresented in traditional startup ecosystems and underserved by both VC and accelerator models. Beta Boom has offices in Chicago and Salt Lake City.

Black Creek Group is a leading real estate investment management firm that has bought or built over $21 billion of investments throughout its more than 25-year history. The Firm manages diverse investment offerings across the spectrum of commercial real estate – including industrial, office, retail, and multifamily – providing a range of investment solutions for both institutional and wealth management channels.

Castle Hall supports the due diligence programs of more than 100 institutional investors worldwide. The firm's ESG Diligence platform offers an innovative and effective solution to help asset owners validate the ESG behaviours of third-party asset managers. Moving beyond manager self-reporting, Castle Hall's Responsible Investment Strategy diligence validates that a GP's investment decision making process genuinely incorporates E, S and G criteria and is not overstated – or greenwashed. Responsible Investment Manager reviews evaluate the asset manager's own business across factors including diversity, #metoo claims, environmental policies and recruitment, training and HR policies.

Sponsors

civitas

Civitas Capital Group is an asset management firm based in Dallas, that offers global institutional investors, family offices, and qualified individuals compelling, niche investment strategies in U.S. real estate and lodging. Its Alternative Investments divisions are accomplished in sourcing and integrating non-traditional capital and/or structures into investments to enhance returns and mitigate risk. Our competitive advantage comes from our deep expertise in US markets paired with our international cultural competency.

CLAYTON DUBILIER & RICE

Founded in 1978, Clayton, Dubilier & Rice employs a distinctive approach to private equity investing, combining financial and operating capabilities to build businesses and enhance long-term performance. Since inception, CD&R has managed the investments of more than $30 billion in more than 90 companies with an aggregate transaction value of more than $140 billion.

commonfund

Commonfund was founded in 1971 as an independent asset management firm with a grant from the Ford Foundation. Together with or through its affiliates, Commonfund today manages customized investment programs for endowments, foundations and public pension funds. Among the pioneers in applying the endowment model of investing to institutional portfolios, we provide extensive investment flexibility using independent investment sub-advisers for discretionary and non-discretionary outsourcing engagements. Investment programs incorporate active and passive strategies in equities and fixed income, hedge funds, real assets and private capital. All securities are distributed through Commonfund Securities, Inc., a member of FINRA. For additional information about Commonfund, please visit www.commonfund.org.

Sponsors

FAIRVIEW CAPITAL

Fairview Capital Partners is a leading private equity investment management firm specializing in dynamic segments of the market. Our areas of focus include top-tier venture capital and next generation managers as well as co-investment and legacy asset management. Founded in 1994, Fairview provides innovative, intelligent, investment solutions and services to institutional investors. Since inception, Fairview has managed $9.6 billion through funds of funds, customized separate accounts and other innovative structures.

GCM GROSVENOR

GCM Grosvenor is a global alternatives investment firm with $55 billion in assets under management in hedge fund strategies, private equity, infrastructure, real estate, credit, and multi-asset class opportunistic investments. We have specialized in alternatives since 1971, and we are dedicated to unlocking value for our clients by leveraging our cross-asset class and flexible investment platform. Our experienced team of approximately 500 professionals from diverse backgrounds serves a global client base of institutional and high net worth investors. GCM Grosvenor is headquartered in Chicago, with offices in New York, Los Angeles, London, Tokyo, Hong Kong, and Seoul. GCM Grosvenor promotes equal access to capital in alternatives by driving increased investment with small, emerging and diverse managers. We have over $19 billion invested and committed to these managers across private equity, hedge funds, infrastructure, and real estate. Our experienced team leverages a network of contacts built over decades to source the next generation of talent, helping to drive a more diverse and inclusive industry. To further drive the success of these managers, we host multiple industry-leading annual conferences that train, educate and promote small, emerging, and diverse managers while connecting institutional investors to these managers, further accelerating their growth.

GREENSPRING ASSOCIATES

Greenspring Associates is a venture capital investment platform managing over $10 billion in committed capital for Limited Partners worldwide. From seed stage through growth, the firm serves as a value-added lifecycle partner to established and next generation venture capitalists and entrepreneurs making fund and direct investments on a primary and secondary basis across diversified, concentrated and niche investment strategies—across geographies, sectors and investment themes. We believe that by building and nurturing deep, trusted relationships with venture capitalists, entrepreneurs and Limited Partners who are shaping the future, we can fulfill our mission to support lasting growth and democratization of the global innovation economy while consistently delivering outsized returns to our investors.

Sponsors

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.

Kong Capital is a real estate private equity firm that specializes in strategic investments in the Senior Housing sector in the U.S. Led by CEO Coe Schlicher, Kong Capital offers a unique, well-rounded and innovative approach to developing and enhancing projects in this asset class. Our depth of experience across a range of industries — from healthcare to technology — ensures that we successfully source markets and manage the operational complexities involved in this growing and diverse sector.

Since our founding in 2006, we have helped best-in-class investment managers market themselves efficiently through access to the right kind of global capital from a wide range of long-term investors. Our investor relationships understand the importance of real estate and real assets within their broader portfolios. Park Madison's highly efficient approach to raising capital is designed to maximize fundraising potential within competitive and often challenging capital markets. The Park Madison team is built from a diverse group of professionals with experience on both the buy-side and sell-side of the industry. We leverage this experience to ensure that we find the right solutions for our clients' needs – no matter how complex. Our unique expertise allows us to offer a variety of highly customized capital solutions to real estate managers, including commingled funds, separate accounts, programmatic joint ventures, and recapitalizations. Our comprehensive, results-oriented approach has been validated across market cycles. Since 2006, Park Madison has participated in raising more than $17 billion of equity capital from institutional investors.

Sponsors

Investing in the Growth Engine of America ® – Star Mountain Capital optimizes absolute and risk-adjusted returns as a specialized investor exclusively focused on providing capital to lower middle-market established small and medium-sized businesses that have between $3 million and $20 million of EBITDA. Star Mountain's data-driven approach, bringing large market expertise and resources to private equity and private credit investing / lending is powered by its custom-built technology, Collaborative Ecosystem ® and team who have been investing in this market since 2001. Star Mountain was recognized as one of the Best Places to Work by Crain's and Pensions & Investments in 2019.

Stellex Capital Management LP is a private equity firm that invests in middle-market companies in North America and Europe through its offices in New York and London. We seek to identify opportunities where we can deploy capital to provide stability, catalyze operational improvement and foster growth. We work closely with high quality management teams to unlock and enhance the value of the underlying franchise.

StepStone is a global private markets investment firm focused on providing customized investment solutions and advisory and data services to some of the most sophisticated investors in the world. With more than US$280 billion of private markets allocations, including over US$62 billion of assets under management as of December 31, 2019, StepStone covers the spectrum of opportunities in private markets across the globe. The firm uses a disciplined, research-focused approach to prudently integrate fund investments, secondaries and co-investments across the private equity, infrastructure, private debt and real estate asset classes.

Sponsors

Reven Capital is a value real estate investment management firm focused on global real estate investments. We seek opportunistic investments in real estate, debt, real estate public securities, and special situations. We target investments in countries with established indices with volatility due to macroeconomics, cyclical trends, geo-political situations, mismanaged companies and assets.

Trilantic Capital Management L.P. ("Trilantic North America") is a private equity firm focused on control and significant minority investments in North America. Trilantic North America's primary investment focus is in the business services, consumer and energy sectors. Trilantic North America has managed six private equity fund families with aggregate capital commitments of $9.7 billion. Trilantic North America has been recognized by Inc. Magazine's 2019 list of Top 50 Founder-Friendly Private Equity Firms. For more information, visit www.trilanticnorthamerica.com.

Keynote Speaker

Mark Anson, PhD, CFA, CAIA

CEO and Chief Investment Officer, Commonfund (New York)

Mark Anson is the Chief Executive Officer and Chief Investment Officer of the Commonfund and Chairman of the Board of Commonfund Capital Inc. and Commonfund Asset Management Company. Previously, he was the President and Chief Investment Officer for the Bass Family Office of Ft. Worth, Texas which was recognized as Family Office of the Year for 2014 & 2015. He was the President & CEO of Nuveen Investments, and Nuveen Alternative Investments, a full service asset management company with over $250 billion in assets under management. Prior to Nuveen, Mark served as the Chief Executive Officer and Chief Investment Officer for the British Telecom Pension Scheme (BTPS), the largest institutional investor in the UK with assets of £65 billion. In addition, Mark was the CEO of Hermes Pensions Management in London, a £55 billion asset management company that is wholly owned by the BTPS. Prior to joining BTPS, he served as the Chief Investment Officer of the California Public Employees' Retirement System, the largest institutional investor in the United States with over $300 billion in assets. Mark is currently a Trustee for the $65 billion UAW Medical Benefits Trust. He also serves on the Law Board of the Northwestern University School of Law, the Board of the Toigo Foundation, and the Board of Panagora Asset Management. He is the only person to have served on the Board of Governors for both the CFA Institute and the CAIA Association. Mark has published over 100 investment articles in professional journals and has won three Best Paper Awards. He is also the author of five financial textbooks including the Handbook of Alternative Assets, which is the primary textbook used for the Chartered Alternative Investment Analyst program. Mark earned a B.A. in Economics and Chemistry from St. Olaf College, a Ph.D. and Masters in Finance from Columbia University Graduate School of Business, and a J.D. from Northwestern University School of Law, all with honors. He has also received several industry awards in recognition of his leadership in asset management. Last, Mark has earned the Chartered Financial Analyst, Chartered Alternative Investment Analyst, Certified Public Accountant, and Chartered Global Management Accountant professional degrees, and he is a Member of the Law Bar of New York and Illinois.

Speakers

Sue Toigo
Chairman, Fitzgibbon Toigo & Co. (California)

Sue Toigo is the chairman of Fitzgibbon Toigo Associates which provides access for emerging and established investment managers to the global institutional investment community. Ms. Toigo is the past chairman and cofounder of the Institute for Fiduciary Education (IFE) and a director and cofounder of the Robert A. Toigo Foundation. IFE was established in 1985 by Ms. Toigo and her late husband and business partner, Bob Toigo, to provide educational services to large institutional investors. Over 3,000 institutional investors have attended week-long IFE seminars worldwide. The Toigo Foundation was started in 1989 to help change the face of finance by providing fellowships and summer internships to talented minorities while attending MBA programs, as well as mentors, job placement services, and ethics and leadership training for their entire careers. The Toigo Foundation supports 130 students each year at 17 top business schools around the United States and has over 800 alumni in the financial services industry globally. Long an advocate for children and minorities, Ms. Toigo served for 16 years as the lobbyist for and a founding board member of the California Children's Lobby and was named one of 10 Outstanding California Lobbyists by the California Journal. As the executive director of the Children's Alliance, she helped community groups establish child care centers throughout California and has infant and toddler programs for the children of migrant farm workers named for her in French Camp, California. A graduate with honors from the University of California at Berkeley, she has been inducted into Berkeley's Women's Hall of Fame. Ms. Toigo serves on the Columbia Business School Board of Overseers, on the boards of NeuralIQ, a cyber security company, and Altrushare Securities, the first traditional brokerage in the US with a non-profit ownership structure. A portion of AltruShare profits goes to the Toigo Foundation each year. Ms. Toigo has served as a visiting Woodrow Wilson Fellow at universities in Texas, Nebraska, and Indiana, and spoken on behalf of the U.S. State Department in Australia, New Zealand, Syria, and Chile.

Nancy I. Lashine
Managing Partner & Founder, Park Madison Partners (New York)

Ms. Lashine is the Founder and Managing Partner of Park Madison Partners, a boutique real asset private equity placement firm. The firm is a leading advisor to investment management firms on their business strategy. Park Madison is headquartered in New York City and is a FINRA regulated broker dealer. Ms. Lashine has over 35 years of real estate and investment marketing experience. Prior to forming Park Madison Partners, Ms. Lashine was a strategic consultant advising leading institutional real estate investment managers on product development and the implementation of institutional marketing initiatives. Clients included Lehman Brothers, Angelo Gordon, ING Clarion, Sentinel Real Estate and JER Partners. Ms. Lashine was an early member of The O'Connor Group (1985-1995) and began her finance career at LF Rothschild, Unterberg and Towbin (1981-1985). Ms. Lashine earned her MBA at Columbia University Graduate School of Business, and a BFA, cum laude, from Case Western Reserve in Dance Theatre. She serves on several Boards including the Columbia MBA Real Estate Advisory Board, the Gibney Dance Center Board, and is a past board member of the Pension Real Estate Association. She is a member of ULI and WX (Executive Women in Real Estate).

Speakers

Deborah L. Harmon

Co-Founder and Chief Executive Officer, Artemis Real Estate Partners (Washington D.C.)

Ms. Harmon, Co-Founder and CEO of Artemis Real Estate Partners, is an industry leader and entrepreneur with more than 30 years of experience in real estate. Ms. Harmon, along with Penny Pritzker, co-founded Artemis Real Estate Partners in 2009. She has oversight responsibility for the firm, establishing and managing the firm's strategic direction. Prior to co-founding Artemis, Ms. Harmon spent 17 years establishing and leading the principal investing business at J.E. Robert Companies, Inc., a global real estate investment firm where she was President and Chief Investment Officer from 1997 until her departure in 2007. Ms. Harmon currently serves as Chairperson of the Pension Real Estate Association Foundation, on the Board of the Pension Real Estate Association, as a key leader and former trustee of the Urban Land Institute, and as a member of the Advisory Board of Jasper Ridge Charitable Fund and the Advisory Board of the BlackIvy Group. She also serves on the Board and Executive Committee for Women for Women International and is a member of the Council on Foreign Relations. Ms. Harmon was previously appointed by President Obama to serve as a Commissioner for the White House Fellows program and was a member of the Board of Directors for Forest City Enterprises [NYSE: FCE] and Avis Group Holdings [NYSE: AVI].

Julie Donegan

Portfolio Manager, California State Teachers' Retirement System (Sacramento)

Julie Donegan joined CalSTRS in December 2019 as a Portfolio Manager. She is responsible for strategic initiatives, including ESG related real estate investments. Ms. Donegan's work experience includes nearly ten years at Franklin Real Asset Advisors where she served as a Senior Vice President and was a voting member of the Global Real Estate Investment Committee. While at Franklin, Ms. Donegan focused on manager due diligence, underwriting as well as client responsibilities. She also served as a senior vice president with Eastdil Secured where she focused on manager due diligence, private fund structuring, joint ventures and structured finance transactions. Ms. Donegan began her career at CalPERS where she was an investment officer responsible for the $2.0bn non-core real estate program. She holds a B.S. in Business Management. Ms. Donegan is a member of PREA and CREW where she served on the National Board of Directors.

Sonny Kalsi

CEO, BentallGreenOak (New York)

Sonny Kalsi is the CEO of BentallGreenOak (BGO) and is based in New York City. BGO is a global real estate investment and management platform with approximately $50BN under management. BGO has 24 offices worldwide (North America, Europe, and Asia) and over 1,300 employees. The firm manages investment strategies and properties in various asset and risk classes. Sonny previously was a Founder of GreenOak Real Estate in 2010 and together with the team grew the business organically to $12BN of assets under management in 10 countries with over 100 employees. Before GreenOak, Sonny was Global Co-Head of Morgan Stanley's Real Estate Investing (MSREI) business and President of the Morgan Stanley Real Estate Funds until 2009. At its peak, the platform had approximately $100 billion of assets under management in 33 countries. During his 18-year career at Morgan Stanley, Sonny spent almost 10 years in Asia and has lived and worked in six different locations around the world. Sonny is a graduate of Georgetown University and continues to be very involved with the school. He has been cited by Private Equity Real Estate magazine as one of the "30 Most Influential" people in private equity real estate globally. Sonny is on the board of several charitable organizations including Teaching Matters, Room to Read, SparkYouth NYC, Asia Society, and the Hirshhorn Museum. He is a Trustee of the Spence School, board member of Oberoi Realty, and Georgetown University. He is also an Adjunct Professor at Columbia University in the Master of Real Estate Program.

Speakers

Maurice J. Coleman

Deputy Chief Investment Officer, Teachers' Retirement System of Louisiana (Louisiana)

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Yvonne Nelson

Head of Real Estate, New York City Office Of The Comptroller (New York)

Yvonne Nelson is the Head of Real Estate at the Office of the NYC Comptroller and directs such investment activities on behalf of the NYC Retirement Systems. She is responsible for the design, implementation and oversight of this investment program. The five NYC Systems have separately allocated 8% or 9% to this asset class, which represents a potential total capitalization approaching $14 billion for private real estate. On a committed and invested basis, the exposure to real estate is approximately $10 billion today and is comprised of investments that are well diversified in terms of strategy, geography, property type and investment structure. Ms. Nelson joined the Office of the NYC Comptroller in 2005. Prior to the Comptroller’s Office, Ms. Nelson worked with the NYS Common Retirement Fund as a Real Estate Investment Officer for thirteen years. She holds a B.A. from New York University and a M.B.A. from Rutgers University.

Bhavika Vyas

Managing Director, StepStone Group (New York)

Ms. Vyas is a member of the responsible investing team at StepStone. Prior to StepStone, Ms. Vyas was a managing director at East Rock Capital, a multi-family office, and focused on private equity co-investing. Before that, Ms. Vyas Vincent was a vice president on the private equity and co-investment teams at Goldman Sachs Investment Management and Siguler Guff, covering a wide range of strategies, including buyouts, energy and infrastructure, distressed, emerging markets private equity and impact investing. Ms. Vyas also spent time as a portfolio manager at the Acumen Fund, an impact investment manager, focused on emerging market water and sanitation issues, and was a founder of Velocitas Partners, a responsible investing advisory firm. Ms. Vyas received an MBA from Stanford Business School and a BSE from Duke University.

Speakers

Lara Banks

Managing Director, Makena Capital Management (Palo Alto, California)

Lara Banks, a Managing Director, is co-head of Makena's Private Equity team, responsible for day-to-day portfolio management and manager selection across private equity investments. Lara is also a member of Makena's Management and Investment Committees. In addition to her duties overseeing private equity investments, Lara leads the firm's sustainability efforts as they relate to investment diligence and oversight. Prior to joining Makena in 2012, Lara was an associate at GE Energy Financial Services, a financial division investing across the capital structure of energy assets. At GE, Lara analyzed investments in domestic and foreign oil and gas fields. Prior to GE, Lara was a power markets analyst at DC Energy, a proprietary energy trading firm. Lara earned an M.B.A. from Harvard Business School and a B.A. in Economics and Government, magna cum laude, from Cornell University.

Ray Whiteman

Co-Founding Partner, Stellex Capital Management (New York)

Mr. Whiteman is a Founder and Managing Partner of Stellex Capital Management LP. Prior to establishing Stellex, Mr. Whiteman was a Partner at The Carlyle Group and a Managing Director and Co-Head of Carlyle Strategic Partners. Prior to joining Carlyle in May 1996, Mr. Whiteman was a Vice President and Group Head in the Leveraged Finance Department of Credit Lyonnais. Mr. Whiteman has also held several positions at both Citicorp and The Chase Manhattan Bank, N.A. Mr. Whiteman currently serves as a director on the board of Titan Acquisition Holdings L.P. and Cisco Investment Holding LLC. In the past, Mr. Whiteman served as the Chairman of the boards of MHI Holdings LLC and Morbark Holdings LLC and on the board of Diversified Machine, Inc., RPK Capital Partners, LLC, Metaldyne, LLC, Stellex Aerostructures, Inc., Brintons Carpet Limited, DPG Aerospace and Service King, as well as the investment committee of RLJ Equity Partners, an affiliate of The Carlyle Group and Robert L. Johnson. Previously, Mr. Whiteman has served on the boards of numerous Carlyle portfolio companies such as US Marine Repair, Norfolk Drydock and Shipping Company, Key Plastics, Breed Technologies and The Aerostructures Corporation.

Jason R. Howard

Managing Director, Investments, GCM Grosvenor (Los Angeles)

Mr. Howard is co-head of the firm's private equity diverse manager practice and also serves on the ESG Committee and the Diversity & Inclusion Governing Committee. He focuses on client portfolio management and private equity fund investments and co-investments. Prior to joining GCM Grosvenor, Mr. Howard was an Associate in the Investment Banking Division at Goldman Sachs. Mr. Howard was also a Manager of Deal Analysis at Walt Disney Pictures and Television and a consultant for Turner Broadcasting. He began his career in the Mergers & Acquisitions Group at Goldman Sachs. Mr. Howard graduated with high honors from the Goizueta Business School at Emory University with his Bachelor of Business Administration. Mr. Howard currently serves as a member of the board of the Segerstrom Center for the Arts, and he recently completed a nine-year term on The Salvation Army's National Advisory Board.

Speakers

Carlos Monfiglio
Co-Head Private Equity, State Street Global Advisors (San Francisco)

Carlos is Co-Head of private equity at State Street Global Advisors (SSGA). He has 15 years of private equity investment experience and is a generalist with emphasis on business services, technology and financial services. Prior to SSGA, Carlos was Managing Director on the Private Equity team at GE Asset Management (GEAM) since 2007. Prior to joining GEAM, Carlos founded and ran a wine distribution and marketing company in San Francisco, CA, with operations in Argentina. Previously, Carlos was a founder and Vice President at TH Lee Putnam Ventures, a $1B growth equity firm, where he led investments in the, internet, technology, media and financial sectors in the U.S., Latin America and Europe. Carlos originally joined GE in 1994 on the Corporate Audit Staff. He later joined GE Equity where he focused on making investments in early stage and growth equity companies. Before GE, Carlos began his finance career in commercial banking as an analyst and loan workout officer. Carlos earned a B.S. in Marketing from Fairleigh Dickinson University and an MBA from George Washington University. He is a native of Uruguay and is fluent in Spanish and Portuguese.

Gabrielle Zadra
Senior Managing Director, Cliffwater LLC (Culver City, California)

Gabrielle is a Senior Managing Director of Cliffwater LLC and leads our private assets research team. Gabrielle is a voting member of the firm's investment committee and active on primary, secondary, and direct co-investments. Prior to joining Cliffwater in 2004, Gabrielle was an Associate with Pathway Capital Management, LLC where she led due diligence on private equity investments. Previous experience includes working in investment banking with the Banc of America Securities Technology Group. She also worked for the Service Employees International Union / AFL-CIO. She earned a BA in History and Women's Studies with high honors from Oberlin College, and an MBA in finance from The Anderson School at the University of California, Los Angeles

Debra Draughan
Managing Partner, Top Capital Advisors (Inglewood, California)

Twenty-seven years of private equity experience. Possess a breadth and depth of experience advising private equity fund managers on many facets of their respective businesses. Can assist with the preparation of private equity fund marketing materials, overall marketing process, presentation skills training and advice on team and management issues. Portfolio company team coaching. Fund placement. Forty years of overall investment experience that includes private equity, institutional sales (high yield bonds, high grade debt, public equities, equity research, and money markets). Hold ten securities licenses (private funds, investment banking, financial and operations principal, general securities principal, investment advisor representative, Blue Sky, municipal advisor).

Speakers

Alberto Yepez

Managing Director, ForgePoint Capital (San Mateo, California)

Alberto is one of the pioneers of the cybersecurity industry (founder enCommerce in 1995) and has played significant roles as a serial entrepreneur, public company CEO, board member and venture capital investor. He is recognized as one of the leading investors in cybersecurity and for his company building skills. Alberto spent 10 years at Apple, 2.5 years at Oracle and was CEO of enCommerce, Entrust and Thor Technologies. He serves on the board of the National Venture Capital Association (NVCA) and is chairman of the Hispanic IT Executive Council (HITEC).

David Fann

Vice Chairman, Aksia (New York)

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

JoAnn H. Price

Co-founder/ Managing Partner, Fairview Capital Partners (Connecticut)

Ms. Price is Co-Founder and Managing Partner, a member of Fairview's investment committee and manager of all Fairview-sponsored funds. Prior to co-founding Fairview, Ms. Price served as president of the National Association of Investment Companies headquartered in Washington, D.C. Ms. Price serves on a number of national advisory committees and private equity advisory boards. Ms. Price is currently on the Howard University Board of Visitors and the YMCA of Greater Hartford Board of Trustees. Ms. Price is on the board of the Apollo Theater Foundation in New York City and is the former Chairperson of the Amistad Center for Art & Culture in Hartford, Connecticut. Ms. Price also serves as Chairperson of the Hartford Foundation for Public Giving and is on the Executive Committee of Trinity Health of New England. Ms. Price is a graduate of Howard University.

Speakers

Rodney June

Chief Investment Officer, LA City Employees' Retirement System (Los Angeles)

Mr. Rodney June is LACERS' Chief Investment Officer. His responsibilities include: managing investment advisory, general partnerships, consultant and custodian relationships, performance evaluation, vendor selection, investment policy, investment strategy development and implementation. Mr. June's appointment marks his return to LACERS where he previously served as an Investment Officer II from 1998 to 2008. From 2008 until his return to LACERS, Mr. June was the Chief Investment Officer of the State of Hawaii Employees' Retirement System overseeing an $11 billion portfolio. Mr. June has a master's degree in Business Administration from Auburn University. His bachelor's degree is from California State University, Long Beach, where he was a member of Beta Gamma Sigma.

Caroline Greer

Managing Director, Commonfund (New York)

Caroline Greer is a member of the Commonfund Asset Management Investment team and is primarily responsible for the design, tailoring, and implementation of custom investment solutions for clients through asset allocation recommendations, portfolio oversight and analysis, and tactical rebalancing of client portfolios. Caroline currently serves as the inaugural Chairperson of the Commonfund Diversity and Inclusion Office and is also a member of the Commonfund Asset Allocation Committee. Previously, Caroline focused on hedge fund manager due diligence and portfolio management. Prior to joining Commonfund, she served as a Partner and Principal for Contego Capital Management, LLC, specializing in customized funds of hedge funds. She was responsible for sourcing, evaluating and monitoring hedge fund managers across a full range of strategies. Prior to joining Contego, Caroline was a Senior Vice President for Oppenheimer and Co. where she co-managed their funds of hedge funds program and monitored Oppenheimer's private equity fund. Caroline began her career at Montrose Advisors, a boutique financial advisor specializing in managing customized funds of hedge funds and private equity and venture capital portfolios. In 2015, Caroline was named one of the 50 Leading Women in Hedge Funds globally by The Hedge Fund Journal. Caroline received a B.A. in Political Science from the University of Toronto, and an M.A. and M.Phil. from Columbia University of New York.

Participation Options

COMPLIMENTARY:

We only invite Limited Partners at no cost. We qualify LPs as:

- Public Pensions
- Corporate Pensions
- Pension Consultants
- Foundations
- Sovereign Wealth Funds
- Endowments
- Insurance Investors
- Single Family Offices
- Multi Family Offices
- RIAs
- UHNWI

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 caught sneaking in and pitching a fund or deal, you will be banned from the Carmo platform. You must pay to play.

STANDARD PASS:

- Pass
  - 1 pass to 2-day web meeting and networking/speed dating sessions.
- Networking App Access
  - 1 pass to event networking app for 1 week.

$100 USD Donation to Toigo Foundation

COMPANY SPONSORSHIP:

- Pass
  - 5 company passes to 2-day web meeting and virtual networking/speed dating sessions.
- Networking App Access
  - 5 company passes to event networking app for 1 week.
- Branding
  - Sponsorship branding throughout web meeting, agenda and marketing campaigns.

$1,000 USD Donation to Toigo Foundation

CARMO CONNECT

By the Numbers…

$5+ Trillion AUM in attendance

300+ Total participants

150+ Institutional & Private Wealth Investors

150+ Private Equity/Venture Capital/Real Estate Firms/Funds

3 Industry Exclusive Panel Sessions

3 Hours of private virtual networking/speed dating

2 Day Zoom Web Conference

7 Days of Slack Networking tool access

CARMO CONNECT

In Attendance…

C-Level Executives

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

WEB MEETING APPS

- Our Video Conference will be Powered by ZOOM.
- You can access through web browser or download app on any Tablet, Laptop or Mobile device.
- Once registered for the event through Carmo website, Our team will assist you on how to gain access to our Zoom Conference

Powered by zoom

- Slack is a proprietary instant messaging platform that is typically used by companies in order to communicate efficiently rather than emailing back and forth on miniscule matters. It is also great for subdividing chats for group projects.
- For the purpose of our Web Meeting, this platform works perfectly to facilitate interaction of event attendees.
- We are allowing all webinar participants to join this instant messaging platform in order to communicate with each other freely and on a direct basis. Inside the slack platform there are also sub chats that are called “channels”. Each “channel” represents a different panel topic where participants can communicate with each other openly pertaining to that topic.

slack

- Once registered for the event through Carmo website, Our team will assist you on how to gain access to our Slack Chat.
- This chatroom is only open for the 3-day duration of the Web Conference.

CARMO COMPANIES

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

Contact Information

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

Marjorie Cucalon
Partner, Carmo Capital
T:+1-786-252-6196
mcucalon@baltrax.com

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

Renato Ferreira
Vice President, Real Estate
T:+1-646-688-3375
Renato.ferreira@carmocapital.com

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

Catherine Correia
Associate, Investor Relations & VP, Marketing
T:+1-646-688-3207
catherine.correia@carmocapital.com

Flavia Correia
Associate, Investor Relations
T:+1-646-688-3207
flavia.correia@carmocapital.com

Paul Tuccillo
Managing Director, Real Estate
T:+1-516-524-3990
paul.tuccillo@carmocapital.com

Thank You

401 Broadway Suite 2316 New York, NY 10013
www.carmocompanies.com/connect