

# The Private Markets Secondaries Web Meeting

---

**ZOOM & SLACK**

October 8<sup>th</sup> & 9<sup>th</sup> 2020  
Pacific Daylight Time



**LIVE ONLY, RECORDING IS PROHIBITED**  
**BUSINESS CASUAL ATTIRE**





# The Private Markets Secondaries Web Meeting

ZOOM & SLACK– October 8<sup>th</sup> & 9<sup>th</sup> 2020

Dear Colleague,

It is with great pleasure that I invite you to The Private Markets Secondaries Web Meeting. The aim of this Virtual Conference is to connect and educate institutional investors, asset owners, and investment managers on secondaries strategies across the various sectors of private markets, particularly in the current COVID environment.

Our online meeting brings together over 300 senior level investment professionals that will join us to virtually network and discuss the recent evolution of secondaries, including current investment opportunities, structures, performance across secondaries in private equity, venture capital, credit and real assets. Panel topics include nuances of secondary transactions in a remote-work and diligence environment, planning and executing LP portfolio sales, GP-led secondaries, asset-concentrated secondaries and overcoming potential conflicts of interest amongst stakeholders.

The webinar will feature two outstanding keynote sessions representing the highest quality investment management organizations. Specific, Stephen Moseley, Deputy CIO from the Alaska Permanent Fund Corporation (APFC), the Sovereign Wealth Fund for the state of Alaska, will launch the day's discussions. APFC is one of the most sophisticated institutional investment organizations, with an innovative investment team that has engaged in a wide range of primary, secondary and direct investment transactions. Mr. Moseley will discuss APFC's long term strategy and shorter term execution plan that is designed to generate attractive risk-adjusted returns for its Alaskan beneficiaries

Later, a keynote fireside chat will feature Ravi Viswanathan, founder and managing partner of NewView Capital, who's firm was created as a result of a \$1.35 billion spin-out from NEA in 2018. Interviewing Mr. Viswanathan will be Michael Woolhouse, who recently joined TPG to build a new secondaries business and was formerly the Head of Secondaries for CPP Investments. CPP Investments was one of Ravi's backers in his spin-out from NEA.

Day one of the event is held through panels in a webinar format and day two consists of virtual networking where LP & GP audience members can meet face to face in intimate groups of 5-6 attendees. 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



# Agenda Outline

THURSDAY, OCTOBER 8<sup>TH</sup> – DAY 1

9:00AM PDT

## Welcoming Address

Roy Salsinha, President, CEO, Carmo Companies (New York)  
Joncarlo Mark, Founder, Upwelling Capital Group

9:05AM PDT

## Presentation: State of Secondaries Market

Nigel Dawn, Senior Managing Director and Head of Evercore's Private Capital Advisory Group discusses current trends in the secondaries market, key data points and transaction volumes.

Presenter:

Nigel Dawn, Senior Managing Director, Evercore

9:20AM PDT

## Keynote LP Fireside Chat: The Evolution of the Institutional Investor

A conversation with Stephen Moseley, Deputy CIO and Head of Alternative Investments for the Alaska Permanent Fund Corporation.

Keynote Speaker:

Stephen Moseley, Deputy CIO, Head of Alternative Investments, Alaska Permanent Fund

Interviewer:

Joncarlo Mark, Founder, Upwelling Capital Group

10:00AM PDT

## LP Panel – Secondaries & Portfolio Rebalancing

- Motivation to rebalance a portfolio
- Planning and execution, including necessary resources
- Lessons learned through the sale process and key considerations for future transactions
- Future roles for LPs, particularly in GP-led transactions

Moderator:

Joncarlo Mark, Founder, Upwelling Capital Group

Panelists:

Wes Bradle, Senior Portfolio Manager, State Board of Administration of Florida

Louis Choy, Senior Principal, CPP Investment Board

Jose Fernandez, Co-Founder, StepStone Group

Nicole Belytschko, Chief Investment Officer, CM Capital Advisors, LLC



# Agenda Outline

THURSDAY, OCTOBER 8<sup>TH</sup> – DAY 1

11:00AM PDT

## Panel- GP Led Secondaries in Private Equity & Venture Capital

- How to create a win-win outcome all participates
- Potential pitfalls and critical steps necessary to execute transaction
- Regulatory hurdles and legal considerations

Moderator:

Brian Borton, Principal, StepStone Group

Panelists:

Matt Shafer, Managing Director, Northleaf Capital Partners

Edward Sopher, Partner, Gibson, Dunn & Crutcher LLP

Jennifer Kheng, Partner, Lexington Partners

Wolf Witt, Vice President, Abbott Capital

Phil Cummins, Venture Partner, Greenspring Associates

12:15PM PDT

## Panel- GP Led Secondaries in Real Assets

- The challenges with valuations in an unsettled real asset environment
- The pros and cons of leverage, both at the asset level and as a part of the transaction
- Repurposing of real assets and forecasting tenant demand, including the use of space to support burgeoning eCommerce infrastructure
- View of government support for institutional real asset owners and the impact on secondary transactions

Moderator:

Owen G. DeHoff, Managing Partner, Jasper Ridge Partners

Panelists:

Mina Pacheco Nazemi, Managing Director, Barings

Samayita Das, Principal, Pantheon Ventures

Marc Weiss, Partner & Head of Private Real Estate, Partners Group

Brendan MacDonald, Partner, StepStone Group



# Agenda Outline

THURSDAY, OCTOBER 8<sup>TH</sup> – DAY 1

1:15PM PDT

**15 Minute Break**

1:30PM PDT

## **Fireside Chat with Ravi Viswanathan**

In 2018, NewView Capital (“NewView”) was launched, anchored by a world-class group of institutional backers in a \$1.35 billion spin-out secondary transaction from NEA. Since its formation, NewView has had great success and is well on its way to establishing itself as a premier late-stage Silicon Valley-based venture capital firm. Founder and Managing Partner Ravi Viswanathan will talk about the challenges and opportunities the spin-out created, including unforeseen hurdles and the courtship process of attracting blue-chip institutional investors.

Keynote Speaker:

Ravi Viswanathan, Founder & Managing Partner, **NewView Capital**

Interviewer:

Michael Woolhouse, Partner, **TPG Capital**

2:15PM PDT

**End of Day 1**



# Agenda Outline

FRIDAY, OCTOBER 9<sup>TH</sup> – DAY 2

9:00AM PDT

## Private Equity- Virtual Networking/Speed Dating

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

Notable Attendees Include:

Joncarlo Mark, Founder, **Upwelling Capital Group**

Antony Anastasiadis, Senior Associate, **Hamilton Lane**

Nate Maier, Investment Officer - Private Markets, **State of Wisconsin Investment Board**

Mauricio Camargo, Director, **Altra Investments**

William Wang, Portfolio Management, **APG**

10:00AM PDT

## Venture Capital- Virtual Networking/Speed Dating

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

Notable Attendees Include:

Bora Kim, Investment Director, **Rational Capital Partners**

Aanand Bajaj, Investment Analyst, **Cystic Fibrosis Foundation**

Brian Borton, Principal, **PE & VC Team, StepStone Group**

Chris Doppman, Principal, **NEA**

Patrick Gerbracht, Managing Director, **Portfolio Advisors**

Kenyon Lee, General Manager (Investment), **Wheelock Capital Limited**

11:00AM PDT

## Real Assets- Virtual Networking/Speed Dating

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

Notable Attendees Include:

Igor Tiguy, Director, Planning Services & Co-CIO, **Twelve Points Wealth Management**

Terri Troy, President, **Troy Advisory Services**

Josh Cleveland, Partner, **StepStone Group**

Drew Iadanza, Vice President, Real Estate, **StepStone Group**

John Stinebaugh, Managing Partner, **Brookfield Renewable Energy Group**

12:00PM PDT

## Private Credit- Virtual Networking/Speed Dating

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

Notable Attendees Include:

Eric Green, Senior Advisor, **Upwelling Capital Group**

David Murav, Partner, **LaSalle Capital**

Milos Milosevic, Vice President, **Four Shore Capital**

Cameron Rondo, Senior Associate, **Aksia**

1:00PM PDT

End of Day 2



# Lead Sponsor



*Founded in 2011, Upwelling Capital Group LLC is an investment advisor focused on providing advisory and capital solutions to premier institutional investors and private capital managers. The Principals have cumulatively overseen over \$50 billion in global private equity commitments and have successfully managed over \$5 billion in legacy, tail-end commitments, transfers and workouts for leading institutional investors.*

# Institutional Partner



*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](http://ILPA.org).*

# Sponsor

ABBOTT CAPITAL

Abbott was founded in 1986 and remains a leading independently owned and managed investment firm focused on providing its investors long-term continuity and accountability in private equity investment management. With over \$9 billion in AUM, Abbott specializes in building customized private equity portfolios, managing assets for a global investor base comprised of public, corporate, and multi-employer pension funds, foundations, endowments, family offices, and high net worth individuals. Abbott has made over \$21 billion in commitments to more than 500 private equity investments across primary, secondary, and co-investment opportunities on behalf of our clients.

 CEBILE CAPITAL

Cebile Capital is a leading placement agent and secondary market advisor. They are a strategic partner to alternative fund managers and a trusted liquidity provider for institutional investors. Professionals in their LP-led Secondaries Advisory segment of its business are specialists in advising LPs on tailored liquidity solutions, including broad portfolio sales, non-core or tail-end positions; with a particular expertise advising on the sale of multi-fund portfolios in the \$25-\$500 million range, having completed over 100+ such transactions. Professionals in their GP-led Secondary Advisory segment of its business serve as strategic advisors to GPs looking to provide liquidity solutions to their LPs; and have advised on various types of GP-led deal types, including: continuation vehicles, stapled follow-ons and/or primaries, recapitalizations, tender offers, top-ups and hybrid solutions. Cebile also offers its secondaries advisory services to individual private capital investors, including family offices and HNWI's, via its Direct Secondaries Advisory platform.

EVERCORE

Evercore (NYSE: EVR) is a premier global independent investment banking advisory firm. We are dedicated to helping our clients achieve superior results through trusted independent and innovative advice on matters of strategic significance to boards of directors, management teams, and shareholders - including mergers and acquisitions, strategic shareholder advisory, restructurings, and capital structure. Evercore also assists clients in raising public, private capital, delivers equity research, equity sales and agency trading execution, in addition to providing wealth and investment management services to high net worth individuals. Founded in 1995, the Firm is headquartered in New York and maintains offices and affiliate offices in major financial centers in North America, Europe, the Middle East and Asia.

GIBSON DUNN

Gibson, Dunn & Crutcher LLP is a leading international law firm that advises clients on significant transactions and disputes around the world. Known for excellence in the practice of law, Gibson Dunn consistently ranks among the world's top law firms in industry surveys and major publications. The firm is distinctively positioned in today's global marketplace with more than 1,300 lawyers in 20 offices: Beijing, Brussels, Century City, Dallas, Denver, Dubai, Frankfurt, Hong Kong, Houston, London, Los Angeles, Munich, New York, Orange County, Palo Alto, Paris, San Francisco, São Paulo, Singapore, and Washington, D.C.



# GREENSPRING ASSOCIATES

PARKMADISONPARTNERS



## Sponsor

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.

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.

Partners Group is one of the largest private markets investment managers in the world. We serve over 900 institutional investors worldwide who seek superior investment performance through private markets for their more than 200 million beneficiaries. We have USD 96 billion in assets under management and more than 1,500 diverse professionals across 20 offices worldwide. We realize potential in private markets by financing and developing great companies, desirable real estate and essential infrastructure. We create value in our investments through active and long-term responsible ownership. Since inception, we have invested over USD 135 billion in private equity, private real estate, private debt and private infrastructure on behalf of our clients.

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.

# Keynote Speaker



## Stephen Moseley

Deputy CIO, Head of Alternative Investments, Alaska Permanent Fund (Juneau)

Steve Moseley is Deputy CIO and Head of Private Markets and Alternative Investments for the US\$65 billion Alaska Permanent Fund, an endowment formed in 1980 to provide for all current and future generations of Alaskans. Before joining APFC Moseley restructured and sold Marston-Ross Corporation, a Connecticut-based family investment office. Before that he was president of StepStone Group, a global manager of diversified private market assets and, prior to that, co-president of the direct investment division of StepStone's predecessor company. Earlier in his career, Steve worked in investment banking at Credit Suisse First Boston ("CSFB") and as a principal in CSFB's private equity investment affiliate, Windward Capital Partners. Moseley received his MBA from Yale University and his BA from Wesleyan University.



## Ravi Viswanathan

Founder & Managing Partner, NewView Capital (San Francisco)

I founded NewView Capital (NVC) in 2018 after spinning out from NEA, where I spent 15 years and was a General Partner investing in software and fintech companies. NVC focuses on growth-stage technology companies, with a portfolio including Duolingo, 23andMe, Scopely, Heap, Course Hero, Plaid, and Hims. I also serve on the Board of Directors for Bloomreach, Course Hero, Forter, Gladly, Heap, Mindtickler, and Reltio. The launch of NewView Capital is our answer to a very important question in venture capital today - how do we best meet the demands of a changing market, where more companies are opting to stay private longer? NewView Capital is pioneering an innovative model that is designed to drive sustainable growth for entrepreneurs, venture capital firms, and limited partners in this new venture landscape. I am passionate about finding, funding, and empowering entrepreneurs with exceptional ideas, drive, and execution capabilities.

# Speakers

## Joncarlo Mark

Founder, Upwelling Capital Group (Sacramento)



Joncarlo R. Mark is founder of Upwelling Capital Group LLC, an investment adviser that provides capital solutions to premier institutional investors. Prior to forming Upwelling in 2011, Joncarlo was a Senior Portfolio Manager in the Alternative Investment Management (AIM) Program at the California Public Employees Retirement System (CalPERS). CalPERS is the largest US public pension fund, with over \$400 billion in overall assets. From 2007 to 2010, Joncarlo served as Chairman of the Board for the Institutional Limited Partners Association (ILPA), whose 250-member institutions at the time managed more than \$1 trillion of private equity capital. He continues to serve as a faculty member for the ILPA Institute, which provides executive education to its membership. From 2014 to 2020, Joncarlo was a trustee for the University of California Davis Foundation and held the role of Finance and Investment Committee chair from 2017 to 2019. From 2012 to 2018, he was also on the Board of Directors for AltExchange Alliance, an industry group dedicated to implementing standardization of financial reporting in private equity. Prior to joining CalPERS in 1999, Joncarlo spent six years with Premier Farnell PLC, a global industrial products manufacturing and distribution company. Joncarlo earned an MBA from the Graduate School of Management at the University of California Davis and received a BA from the University of California San Diego.

## Nigel Dawn

Senior Managing Director, Evercore (New York)



Nigel Dawn is a Senior Managing Director and Head of Evercore's Private Capital Advisory Group. With a team based in the United States and Europe, Mr. Dawn is responsible for originating, developing and managing secondary market transactions for owners and managers of private financial assets seeking liquidity in the secondary market. Mr. Dawn has represented public pensions, university endowments, financial institutions, public quoted investment vehicles and other owners of private financial assets. Mr. Dawn was previously the Global Co-head of the Private Funds Group at UBS Investment Bank. At UBS Investment Bank, Mr. Dawn was responsible for founding and leading the Secondary Market Advisory business globally, and prior to this, was responsible for UBS Investment Bank's investments in private equity funds. Mr. Dawn's career began in international commercial banking with Standard Chartered Bank and following his MBA was a management consultant at Booz\*Allen and Hamilton in New York. Mr. Dawn graduated with a BA (Hons.) in Politics and East Asian Studies from the University of Newcastle-Upon-Tyne, and earned his MBA degree at the Columbia Business School.

## Wes Bradle

Senior Portfolio Manager, Florida State Board of Administration (Tallahassee)



Wes Bradle is a Senior Portfolio Manager in Private Equity at the Florida State Board of Administration (FSBA). His duties include new investment underwriting, portfolio management, and monitoring. Mr. Bradle currently monitors 18 private equity firms and 36 funds that represent more than \$4 billion in committed capital. Prior to FSBA, he was an Investment Officer in Private Equity at CalPERS. Before CalPERS, Mr. Bradle was an Analyst at Friedemann & Associates and also worked at a boutique consulting firm. Mr. Bradle graduated magna cum laude with a B.A. in business administration from Point Loma Nazarene University and received his M.B.A. from Florida State University.

# Speakers



## Louis Choy

### Senior Principal, CPP Investment Board (London)

Louis is responsible for executing on CPP Investments' Secondaries activities globally. He focuses on LP Secondaries, GP-led Secondaries, Portfolio-level Preferred Equity and GP-level Financings. Louis has over 10 years experience in Secondaries. Prior to joining CPP Investments, he worked on the investment team at Pantheon in London and TD Securities in New York. Louis holds a BBA/BMath (Double Degree) from Wilfrid Laurier University and the University of Waterloo.



## Jose Fernandez

### Co-Founder, StepStone Group (New York & La Jolla)

Mr. Fernandez is the Co-COO of StepStone Group and a member of the private equity team where he focuses on US-based small market managers and Latin American investments. He is also involved in the Firm's ESG and diversity initiatives, as well as various investment activities. Prior to co-founding StepStone, Mr. Fernandez was a managing director of Pacific Corporate Group, a private equity investment firm for institutional investors. Mr. Fernandez previously worked with Latham and Watkins LLP's private equity/investment fund group, a practice focused on joint ventures and the structuring, negotiation and operation of pooled investment vehicles such as private equity funds. Mr. Fernandez received his BA from the University of Michigan, Ann Arbor and JD from Stanford Law School.



## Nicole Belytschko

### Chief Investment Officer, CM Capital Advisors, LLC (Palo Alto)

Ms. Belytschko serves as the Chief Investment Officer. Prior to joining C.M. Capital, she was an investment manager with Comprehensive Financial Management, a large West Coast multi-family office. Previously, Ms. Belytschko worked with Scient in developing the firm's corporate venture arm and leading direct investments in technology companies and was a member of Donaldson, Lufkin and Jenrette's Private Fund Group, where she marketed and distributed alternative investment products. Ms. Belytschko holds an MBA from the Anderson School at UCLA, and a BA, Phi Beta Kappa, from the University of California, Santa Barbara.

# Speakers



## Brian Borton

Principal, StepStone Group (La Jolla)

Mr. Borton is a member of the private equity team, focusing on venture capital and growth equity investments. Prior to joining StepStone in 2012, Mr. Borton was an investment banking associate at Focus Strategies, where he advised middle market clients on mergers and acquisitions, recapitalizations, private placements, and corporate strategy. Before that he was a member of the equity research associate program at Brandes Investment Partners, a leading investment advisory firm managing US\$30 billion of global equity portfolios for institutional and high net worth clients. Mr. Borton graduated with a BBA in finance from The University of Texas at Austin and is a CFA charterholder.



## Matt Shafer

Managing Director, Northleaf Capital Partners (New York)

Matt is a Managing Director at Northleaf Capital Partners, an independent global private markets investment firm with more than \$14 billion in private equity, private credit and infrastructure commitments under management. Matt oversees the origination, evaluation and monitoring of Northleaf's private equity investments, and leads Northleaf's New York office. Matt serves on the boards of a number of investments within Northleaf's portfolio. Prior to joining Northleaf in 2018, Matt was a Partner and served as Head of the Americas business for Vision Capital, a global investment firm, where he led the sourcing, analysis and execution of private equity and structured capital investments. Previously, Matt was a Managing Director at Nomura International (formerly Lehman Brothers) in London. He began his career at CIBC World Markets. Matt has served on several corporate boards for private equity-backed companies across the consumer, industrial and business services sectors. Matt received a Bachelor of Arts from Dartmouth College.



## Edward Sopher

Partner, Gibson, Dunn & Crutcher LLP (New York)

Edward Sopher is a corporate partner in the New York office of Gibson, Dunn & Crutcher. Mr. Sopher is Co-Chair of Gibson Dunn's Investment Funds Practice Group. Mr. Sopher's practice focuses on the establishment and operation of private investment funds, including private equity funds, funds of funds, hedge funds, credit funds and real estate funds. He has extensive experience representing the investment managers and sponsors of these funds, as well as institutional investors, seed investors, placement agents and joint venture partners. His clients include Argonaut Private Capital, Credit Suisse, GoldPoint Partners, GCM Grosvenor, Hamilton Lane, Neuberger Berman, Ottawa Avenue, Sheridan Production Partners, StepStone Group, Strategic Partners Fund Solutions and Third Point, among others. He has been involved in a wide variety of investment, private equity and financing transactions for his investment fund clients, including co-investments, fund restructurings and recapitalizations. He regularly represents Strategic Partners and other secondary investment funds in their secondary investment and financing activities. His experience also extends to transactions involving investment management firms, including stake investments, spin-outs, acquisitions, financings and joint ventures.

# Speakers



## Jennifer Kheng

Partner, Lexington Partners (San Francisco)

Jennifer Kheng is a Partner of Lexington Partners primarily engaged in the origination and evaluation of secondary purchases of private equity and alternative investments. Prior to joining Lexington in 2003, Ms. Kheng was an analyst in investment banking at Morgan Stanley. Ms. Kheng graduated from Stanford University with a BS in biological sciences and an MS in management science and engineering.



## Wolf Witt

Vice President, Abbott Capital (New York)

Mr. Witt reviews investment opportunities, conducting analysis and due diligence for prospective investments. He is primarily focused on the sourcing, due diligence, and negotiations of secondary transactions. Mr. Witt's perspective is shaped by his background sourcing and executing secondary transactions and co-investments in the U.S. and Europe. Prior to joining Abbott in 2018, Mr. Witt was a Director at Zurich Alternative Asset Management ("ZAAM"), the in-house unit managing the alternative investments of Zurich Insurance Group. At ZAAM, Mr. Witt was part of the global private equity team responsible for primary fund investments, co-investments, and secondary investments. Prior to that, Mr. Witt worked at the economic consulting unit of Oliver Wyman (NERA) in the Frankfurt and New York offices. Mr. Witt received his M.A. from the University of St. Gallen (Switzerland). He also studied at HEC Business School (France) and received his M.S. from the CEMS program. Mr. Witt is a CFA charterholder.



## Phil Cummins

Venture Partner, Greenspring Associates (Australia)

Phil joined Greenspring Associates as a Venture Partner in 2019. Prior to joining Greenspring, Phil spent 13 years with QIC Global Private equity where he helped lead their private equity program. At QIC Phil lead the venture and growth equity investments activity across directs, funds and secondaries. Phil also served as chairman and CEO of one of QIC's portfolio companies where he was able to implement and drive the investment strategy. Prior to joining QIC Phil worked with BT Alex. Brown, Deutsche Bank and Thomas Weisel Partners in San Francisco where he worked with venture backed companies. He has advised on over 3.2b of capital raisings and 12 M&A transactions. Phil holds a Bachelor of Commerce, is a Chartered Financial Analyst and a member of the Institute of Chartered Accountants Australia and New Zealand.

# Speakers

## Owen G. DeHoff

### Managing Partner, Jasper Ridge Partners (Menlo Park)

Owen DeHoff is a Managing Partner of Jasper Ridge Partners and has responsibility for secondary, direct and co-investments, as well as manager selection in real assets. Prior to joining Jasper Ridge Partners in 2010, Owen was a research analyst in Fortress Investment Group's Global Macro Fund. Previously, he held positions in investment banking at Lehman Brothers, where he focused on corporate finance and M&A advisory, and in the merchant banking group at Cohen Financial, a national commercial real estate lending platform. Owen earned a BA in Urban Studies from Brown University and an MBA from the Tuck School of Business at Dartmouth.

## Mina Pacheco Nazemi

### Managing Director, Barings (Los Angeles)

Mina Pacheco Nazemi is a member of Barings Alternative Investments, a global real estate, private equity and real assets platform. Mina is part of the Funds & Co-Investments team and serves on the investment committee. She is also responsible for originating, underwriting and monitoring primary fund, co-investment, and secondary fund opportunities for private equity and real assets. Mina has worked in the industry since 1998 with experience as a General Partner and Limited Partner investor in private equity and focused on underwriting direct/co-investment opportunities. Prior to joining the firm in 2017, Mina held several leadership and investment positions including Co-Founder and Partner at Aldea Capital Partners and Partner and Investment Committee Member at GCM Grosvenor Customized Fund Investment Group (formerly Credit Suisse CFG). Mina received her Bachelor of Arts with honors in Economics and Political Science from Stanford University and her Master of Business Administration from Harvard Business School. She is an alumna of Sponsors for Education Opportunity (SEO) and Robert Tojgo Foundation. She also is a board member of the Pan American Development Fund and on the alumni board of Harvard Business School.

## Samayita Das

### Principal, Pantheon Ventures (San Francisco)

Samayita is a Principal in Pantheon's U.S. Investment Team, focusing on the analysis, evaluation and completion of infrastructure and real asset investment opportunities. Prior to joining Pantheon, Samayita was Vice President in J.P. Morgan's Energy Investment Banking group where she focused on the oil and gas sector. Samayita holds a BS in Economics and MBA from Duke University.

# Speakers

## Brent Burnett

### Managing Director on Real Assets Team, Hamilton Lane (Portland)

Brent is a Managing Director on Hamilton Lane's Real Assets Team, based in the firm's Portland office, where he is an Investment Committee member and co-lead of the firm's Real Assets group. Prior to joining Hamilton Lane, Brent was a Managing Director and Principal of Real Asset Portfolio Management. Brent joined Real Asset Portfolio Management in 2012 to focus on energy, infrastructure, and minerals and mining, with a secondary focus on real estate investments. Brent co-led the sale of Real Asset Portfolio Management to Hamilton Lane in 2017 and continues to focus on the non-real estate sectors of real assets across primary funds, secondaries and direct equity opportunities for Hamilton Lane's clients and managed accounts. Prior to joining RAPM, Brent worked at R.V. Kuhns & Associates. Prior to joining RVK, Brent worked in the Development and Investment group of Trammell Crow Company and as an Associate on FLAG Capital Management's Real Assets investment funds. Brent began his career as a management consultant for the Monitor Group. Brent graduated from Brigham Young University with a BS in Accounting and a BA in Economics.

## Marc Weiss

### Partner & Head of Private Real Estate, Partners Group (New York)

Marc Weiss is Co-Head of the Private Real Estate business department and Co-Head of the Private Real Estate Americas business unit, based in New York. He is a member of the Global Executive Board, the Global Investment Committee and is the Chairman of the Private Real Estate Direct Investment Committee and the Private Real Estate Integrated Investment Committee. He has been with Partners Group since 2007 and has 33 years of industry experience, having worked at Commonfund, Kenneth Leventhal & Company, Ernst & Young, LLP, UBS Asset Management and Pension Consulting Alliance, Inc., whose discretionary asset management business was integrated into Partners Group. Over the course of his career, he has accumulated significant experience in underwriting direct and indirect real estate investments, performing valuations, overseeing portfolio management as well as capital markets related investment activity including financings, debt and equity restructurings and IPO's. He holds an MBA from the Cornell University Samuel Curtis Johnson Graduate School of Management in New York, USA. He was also a certified public accountant.

## Brendan MacDonald

### Partner, StepStone Group (San Francisco)

Mr. MacDonald is a member of the real estate team. He is also involved in various investment and portfolio management activities. Prior to joining StepStone in 2014, Mr. MacDonald was a founding partner of Clairvue Capital Partners, a real estate investment manager that integrated with StepStone to establish StepStone Real Estate. At Clairvue, he was an investment committee member and sourced, underwrote, and managed investments in the US, Europe, and Latin America. Before Clairvue, he was a director at Liquid Realty Partners, an investment manager focused on real estate private equity secondaries. Mr. MacDonald received his BS from Indiana University and MBA from Harvard Business School.



# Speakers



## Michael Woolhouse Partner, TPG Capital (Toronto)

Michael Woolhouse is the Managing Partner of TPG's North American and European Secondaries business based in Toronto. Michael joined TPG in 2020 from CPP Investments where he most recently served as Head of Secondaries and previously served as CPP Investments' Head of Secondaries and Co-Investments and, before that, as a Senior Principal in its Funds group. Prior to joining CPP Investments in 2007, Michael was an investment banker with TD Securities in Toronto. He holds an MBA from Ivey Business School and a Bachelor of Commerce from the University of Calgary.

# Participation Options

## COMPLEMENTARY:

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

### Conditions:

- Carmo carefully vets all participants to make sure they fit the LP criteria
- Carmo has the right to refuse any participant from joining should they not meet the criteria
- If you raise external capital, you cannot join on a complimentary basis.
- 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 web meeting and networking/speed dating sessions.
- Networking App Access
  - 1 pass to event networking app for 1 week.

**Early Bird:** \$300 USD- *Ends: September 25th*

**Pre-Registration:** \$400 USD- *Ends: October 2nd*

**Standard:** \$500 USD



# Participation Options

## FULL ACCESS PASS:

- **Pass**
  - 1 pass to web meeting and networking/speed dating sessions.
- **Networking App Access**
  - 1 pass to event networking app for 1 week.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes: Companies, names, professional titles, profiles and specific attendee allocation information

**\$1,000 USD**



# Participation Options

## COMPANY SPONSORSHIP:

(10 MAXIMUM)

- **Passes**
  - 5 Company passes to event 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.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes: Companies, names, professional titles, profiles and specific attendee allocation information

**\$2,500 USD**



# Participation Options

## VIRTUAL ROAD SHOW SPONSORSHIP

- **Passes**
  - 5 Company passes to event 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.
- **Attendee List**
  - Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes: Companies, names, professional titles, profiles and specific attendee allocation information.
- **Meeting Facilitation/ Post-Event Virtual Road Show**
  - Select targeted LP attendees from previous events
  - Carmo will professionally introduce via email and help arrange one on one virtual meetings at times and dates that suit both parties.
  - Carmo to put best effort of obtaining at least 15 LP meetings with client and prospective LPs.

**\$10,000 USD**

# Participation Options

## EXCLUSIVE SPONSORSHIP :

(TWO MAXIMUM)

- **Passes**

- 10 Company passes to web meeting and virtual networking/speed dating sessions.

- **Networking App Access**

- 10 Company passes to event networking app for 1 week.

- **Lead Branding**

- Premier sponsorship branding throughout web meeting, agenda and marketing campaigns.

- **Attendee List**

- • Exclusive access to updated conference attendee list before, during and after the virtual event. Attendee list includes: Companies, names, professional titles, profiles and specific attendee allocation information

**\$20,000 USD**

- **Post-Event Virtual Road Show**

- Select targeted LP attendees from previous events
- Carmo will professionally introduce via email and help arrange one on one virtual meetings at times and dates that suit both parties.
- Carmo to put best effort of obtaining at least 15 LP meetings with client and prospective LPs.

- **Exclusivity**

- No other company with competitive strategy or focus can be an event sponsor.
- GP Example- Exclusive debt focused fund manager
- Service Provider Example- Exclusive Law Firm/Accounting sponsor

# 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



# 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
- Sovereign Wealth Funds
- Family Offices, Multifamily Offices and Private Banks
- Government officials
- Economists
- Banks and Investment Banks
- Lawyers
- Auditors
- Commercial Service Providers



# 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



- 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.



- 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.





# upcoming events

 LIVE ONLY, Recording Prohibited

## The Asia Pacific Institutional Real Estate Web Meeting

October 27<sup>th</sup>, 28<sup>th</sup> & 29<sup>th</sup> 2020

Singapore Standard Time

## The Latin American Private Equity & Venture Capital Web Meeting

November 10<sup>th</sup>, 11<sup>th</sup> & 12<sup>th</sup> 2020

Eastern Standard Time

## The Latin America Real Estate Web Meeting

December 8<sup>th</sup>, 9<sup>th</sup> & 10<sup>th</sup> 2020

Eastern Standard Time

Over 30 virtual events planned for 2021!

Visit our website at [www.carmocompanies.com/connect](http://www.carmocompanies.com/connect)





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

## Contact Information

### **Roy Carmo Salsinha**

President & CEO

T:+1-646-688-3375

roy.salsinha@carmocapital.com

### **Marjorie Cucalon**

Partner, Carmo Capital

T:+1-786-252-6196

mcucalon@baltrax.com

### **Erick Cruz**

Senior Vice President, Private Equity

T:+1-646-688-5327

erick.cruz@carmocapital.com

### **Renato Ferreira**

Vice President, Real Estate

T:+1-646-688-3375

Renato.ferreira@carmocapital.com

### **Nicolás Rodríguez**

Vice President, Private Equity

T:+1-646-688-3205

nicolas@carmocapital.com

### **Catherine Correia**

Associate, Investor Relations & VP, Marketing

T:+1-646-688-3207

catherine.correia@carmocapital.com

### **Flavia Correia**

Associate, Investor Relations

T:+1-646-688-3207

flavia.correia@carmocapital.com

### **Paul Tuccillo**

Managing Director, Real Estate

T:+1-516-524-3990

paul.tuccillo@carmocapital.com

Thank You

49 Huntington Bay Road, Huntington, New York, 11743  
[www.carmocompanies.com/connect](http://www.carmocompanies.com/connect)