



Private Markets Secondaries Web Meeting

ZOOM

November 4th, 2021



LIVE ONLY, RECORDING IS PROHIBITED
BUSINESS CASUAL ATTIRE





Private Markets Secondaries Web Meeting

ZOOM– November 4th, 2021

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.

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
NOVEMBER 4TH**

11:00AM PST

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:

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

Panelists:

Brian Borton, Partner, **StepStone Group**

Wolf Witt, Principal, **Abbott Capital**

Clelia Zacharias, Principal, **LGT Capital Partners**

Stephan Connelly, Director, **Star Mountain Capital**

12:00PM PST

Secondaries Virtual Networking/Speed Dating

Join over 150 confirmed LP & GP event attendees for face-to-face networking. 4 randomized 30-minute breakout sessions of 5 people. Groups are shuffled every 30 minutes. Web Cam is mandatory.

1:00PM PST

End of Virtual Conference



Sponsors

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.



Capital Partners

your partner for alternative investments

LGT Capital Partners is a leading alternative investment specialist with over USD 70 billion in assets under management and more than 550 institutional clients in 41 countries. An international team of over 550 professionals is responsible for managing a wide range of investment programs focusing on private markets, liquid alternatives and multi-asset class solutions. Since 2003, LGT Capital Partners has been encouraging the integration of ESG in its offering and its promotion in the financial industry. In 2008, the firm was one of the first signatories of the UN PRI, since 2018 LGT Capital Partners further engages with PRI as a member of its Board. Headquartered in Pfäeffikon (SZ), Switzerland, the firm has offices in New York, Dublin, London, Paris, Vaduz, Frankfurt am Main, Dubai, Beijing, Hong Kong, Tokyo and Sydney.



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.

Speakers

Joncarlo Mark

Founder, Upwelling Capital Group (Sacramento)

Joncarlo Mark is the Founder of Upwelling Capital Group LLC, which was formed in 2011. Prior to forming Upwelling in 2011, Mr. Mark was a Senior Portfolio Manager at the California Public Employees Retirement System (CalPERS), where he was responsible for investing in global private equity partnerships and direct investments, with a portfolio that exceeded \$48 billion of exposure. In addition, from 2007 to 2010, Mr. Mark served as chairman of the board for the Institutional Limited Partners Association (ILPA), whose 350 institutional members manage over \$1 trillion in private equity assets. Prior to joining CalPERS in 1999, Mr. Mark spent six years with Premier Farnell PLC. Mr. Mark currently serves as a trustee of the University of California Davis Foundation, where he also served as chairman of the Finance and Investment Committee. From 2012 to 2018, he was on the board of AltExchange Alliance, an industry body chartered to define, maintain and promote a single data standard for the private equity industry.

Clelia Zacharias

Principal, LGT Capital Partners (New York)

Clelia Zacharias is a Principal of LGT Capital Partners, a global alternative asset manager with over \$75 billion in assets under management. At LGT Capital Partners, Clelia is a member of the private equity investment team, where she is responsible for origination, due diligence, execution and monitoring of US secondary investments. Prior to joining LGT Capital Partners in 2013, Clelia was an Associate at Alpinvest Partners. Prior to Alpinvest, she was an Analyst at Bank of America Merrill Lynch in the Financial Sponsors Group. Clelia graduated from Princeton University with an A.B. in Economics and a Certificate in Finance.

Wolf Witt

Principal, 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.

Speakers



Brian Borton

Partner, 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.



Stephan Connelly

Director, Star Mountain Capital (New York)

Participation Options

COMPLEMENTARY:

- Complimentary registration for All



Participation Options

EVENT ACCESS:

- Complimentary registration for All LPs & GPs to attend

COMPANY SPONSORSHIP:

- **Speaking Position**
 - Client may choose to speak or moderate on panel of choice on event of choice
- **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

\$5,000 USD



By the Numbers...

\$5+ Trillion AUM in attendance

250+ Total participants

125+ Institutional & Private Wealth Investors

125+ Investment Firms/ Funds

4 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...

- Real Estate Firms, Private Equity Funds, Venture Capital Firms
- Real Estate Developers (Institutional Quality)
- Hedge Funds
- Public Pension Funds
- Corporate 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
- Private Debt Funds

C-Level Executives



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.





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

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Thank You

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