



# Private Markets Healthcare & Life Sciences Web Meeting

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ZOOM & SLACK

April 27<sup>th</sup> & 28<sup>th</sup>, 2021



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



# Private Markets Healthcare & Life Sciences Web Meeting

ZOOM & SLACK– April 27th & 28th, 2021

Dear Colleague,

It is great pleasure that I invite you to the Private Markets Healthcare & Life Sciences Web Meeting. Accelerated by the global pandemic, investors remain eager to pour funds into healthcare given strong underlying demand and the industry's resilience at any stage of the economic cycle. New sources of capital continue to flow in from eager investors worldwide, who embrace the industry's fundamental strength. This virtual conference will highlight some of the most important areas of investment from Healthcare IT, Biopharma and other healthcare related buyout, venture and real estate investment opportunities. Over 300 leading investment professionals will share their perspectives, success stories, challenges and the overall climate of healthcare related investments in the short to medium term.

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

**TUESDAY**  
**APRIL 27<sup>TH</sup> – DAY 1**

**10:30 am ET**

## **Welcoming Address**

Roy Salsinha, President, CEO, Carmo Companies

**10:30 am ET**

## **Institutional Investor Perspectives on Healthcare**

Institutional investors their allocation strategies across Private Markets and their activity and appetite for Healthcare and Life Science related investments. Are they actively invested in PE/VC healthcare funds? What is their appetite for direct/co-investment opportunities. What geographical exposure is currently of most interest: US, Asia, Europe, EMEA? Panelists will shine light on current valuations and relative value across stage, strategy and geography.

**Moderator:**

Yeatts Anderson, Principal, Brooklands Capital Strategies

**Panelists:**

David Fann, Vice Chairman, Aksia

Derek Kong, Investment Officer, Los Angeles County Employees Retirement Association, (LACERA)

Weichou Su, Partner, StepStone Group

Nader Sohraby, Senior Associate, Alaska Permanent Fund Corporation

**11:30 am ET**

## **Healthcare Royalties, BioPharma Lending, Intellectual Property**

A Fireside chat with Dr. Evan Bedil, MD, PM, from Marathon Healthcare.

**Keynote Speaker:**

Dr. Evan Bedil, MD, PM, Marathon Healthcare

**Interviewer:**

Anna Makki, Managing Director, Marathon Asset Management





# Agenda Outline

**TUESDAY**  
**APRIL 27<sup>TH</sup> – DAY 1**

12:15 pm ET

## Lunch Break



1:15 pm ET

## Healthcare Venture/Growth

Advances in cell and gene therapy along with life sciences diagnostics continue to spark excitement and draw capital from both sponsors and corporates. These technologies require different R&D and commercialization models. On this panel, leading venture capitalists and family office investors discuss their appetite for healthcare related venture investing. How are they sourcing their deals? Is this BioHealth age the new space age? What is the near and long-term impact of their allocations? Panelists specifically discuss investing early in the following segments: consumer/pharmaceuticals, mRNA medicines, cell therapy and medical devices.

### Moderator:

**Alex Morgan**, Partner, **Khosla Ventures**

### Panelists:

**Andrea Alms**, Co-Fund Manager, **BioHealth Capital Fund**

**Jamie Rhode**, Vice President, **Verdis Investment Management**

**Jayson Rieger**, Managing Partner, **PBM Capital**

**Cynthia Green**, Managing Director, **Connecticut Innovations**

**Sri Sriadibhatla**, Associate Director of Investments, Health & Digital Health \* Investment Group, **Ben Franklin Technology Partners of Southeastern PA**



# Agenda Outline

**TUESDAY**  
**APRIL 27<sup>TH</sup> – DAY 1**

**2:15 pm ET**

## **Afternoon Break**



**3:15 pm ET**

## **Life Sciences Real Estate**

The global race to develop COVID-19 tests, therapeutics and vaccines has necessitated rapid adaptation in working environments. The pandemic has revealed the critical role of the life sciences industry within the global economy and real estate has proven to play an essential role in maximizing the efficiency for these life science companies. On this panel, leading real estate developers and investors discuss how they are fostering innovation through real estate? How facilities are increasing productivity, How are they adapting to consumer and patient needs, and where this segment of real estate is heading?

### **Moderator:**

**Andrew Kaminski**, Vice President, **Cliffwater**

### **Panelists:**

**Chad Phillips**, Managing Director, Head of U.S. Office & Portfolio Manager, **Nuveen Real Estate**

**Cappy Daume**, Managing Director Asset Management, **The Davis Companies**

**Joseph J. Sitt**, Chairman & CEO, **Thor Equities**

**4:00 pm ET**

## **End of Day 1**



# Agenda Outline

**WEDNESDAY**  
**APRIL 28<sup>TH</sup> – DAY 2**

**11:00 am ET**

## Keynote Fireside: Digital Health

Lee Shapiro discusses the Livongo Teledoc Merger and the tremendous growth in the Digital Health space. The panelists also discuss innovation and sustainability across the wellness sector including Kaleidoscope's ARC innovation center in Chicago.

**Keynote Speaker:**

Lee Shapiro, Managing Partner, 7wireVentures

**Interviewer:**

Kenneth Bahk, Co-Founder & Managing Partner, Kaleidoscope Health Ventures

**12:00 pm ET**

## 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.

Some Notable Confirmed Attendees Include:

Byron Beene, Senior Portfolio Manager, KZVK-Dortmund

Sajith Ranasinghe, Managing Director, Alternative Investments, Church Pension Group

Igor Tiguy, Director, Planning, Twelve Points Wealth Management

Charles Nakouzi, Vice President, Verna Investments

Nam Sin Tiah, Senior Investment Analyst, Tsao Family Office

Cristian Nunez, Head of Alternative Investments, Penta Vida

Gabriela Cohen, Head of PE & PD Investments, AFP Cuprum

Ken Glickstein, Managing Director, Braddock Holdings Company

Peter Teneriello, Investment Analyst, Texas Municipal Retirement System

Jose Cloquell, Co-Investments, Banca March

Sebastian Mosqueira, Associate, Private Equity, Olayan Group

Jamie Rhode, Vice President, Verdis Investment Management

Martin Shultz, Portfolio Manager, MP Pension

Xavier Navas, Managing Director, Reig Patrimonia

Robert Crowter-Jones, Partner, Saranac Partners

Anders Friis Binzer, Senior Investment Manager, North-East Family Office

Jayson Rieger, Managing Partner, PBM Capital Group

Cyndi Green, Managing Director Investments, CT Innovations

Isabelle Martin, Senior Vice President, Real Estate Investment Funds, Ivanhoe Cambridge Inc.

Irving Kau, Managing Partner, KWCP

Rogério Tippe, Manager, International Business Development, Portland Holdings Inc.

Matthew Reynolds, Manager of Business Development, Sanne Group

Jesse Rodriguez, Associate, Upwelling Capital Group

Kevin Colas, Founding Partner, Explorations Ventures

Richard Evans, CEO, Debere

Joseph Germain, IR, Kingfish Group

Helen Fox-O'Brien, Managing Director, The Church Pension Fund

Mitchell Green, Portfolio Officer, Illinois Firefighters' Pension Investment Fund

Thomas Kulenkampff, Analyst, Corso Family Office

**2:00 pm ET**

**End of Day 2**



# Sponsors



The BioHealth Capital Fund is a venture capital early stage investment fund created by the BioHealth Innovation ("BHI") which is a private public partnership (501(c)(3) non-profit innovation intermediary). BHI is the co-founder of the BioHealth Capital Region ("BHCR") brand that has grown to be the 4th largest biopharma cluster in the USA. BHI provides a variety of services ranging from international "soft-landing" assistance, Entrepreneur-In-Residences, business development, commercialization, company formation and management, and strategic help along with attracting capital. BioHealth Innovation manages a for-profit subsidiary called BioHealth Innovation Management ("BHIM").



Kaleidoscope Health Ventures is an economic-development firm that aims to build sustainable healthy neighborhoods and world-class health innovation clusters promoting inclusive innovation, talent, and wellness. KHV brings together leading startups, partners, investors, and talent to address socioeconomic and health issues while providing high-value services to support a new wave of life sciences startups and healthcare solutions. This novel approach creates an intersection of new health solutions and healthy communities to drive wellness and longevity for all. KHV achieves this by connecting cross-sector partners, converging best-in-class health and wellness models, and cultivating new initiatives that accelerate the commercialization of new technologies.



Marathon Asset Management, L.P. is an investment manager focused on opportunistic investing in credit and fixed income markets globally. Marathon manages a family of investment programs principally focused on credit strategies including hedge funds, managed accounts, single-client funds and collateralized loan, and debt obligation vehicles. The firm's core competency is distressed and situational investing in the global credit and fixed income markets. Marathon utilizes a research-intensive approach, risk management discipline, and an integrated platform. In addition, the firm has the flexibility to invest across the capital structure, including securities, loans, and structured products. The firm is headquartered in New York City with offices in London and Tokyo. Marathon is one of eight firms selected by the U.S. Department of the Treasury to manage the Legacy Securities Public Private Investment Program ("PPIP") Fund. Founded in 1998, Marathon manages approximately \$18.5 billion of capital and has approximately 160 employees. The firm is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser under the Investment Advisers Act of 1940. Marathon is a member of the National Futures Association ("NFA") and is registered with the Commodity Futures Trading Commission ("CFTC") in the U.S. Additionally, its affiliate is registered with the Financial Services Authority ("FSA") in the UK.



Nuveen Real Estate is one of the largest investment managers in the world with \$133 billion of assets under management. Managing a suite of funds and mandates, across both public and private investments, and spanning both debt and equity across diverse geographies and investment styles, we provide access to every aspect of real estate investing. With over 80 years of real estate investing experience and more than 600 employees\* located across over 25 cities throughout the United States, Europe and Asia Pacific, the platform offers unparalleled geographic reach, which is married with deep sector expertise.



# Sponsors

Investing in the Growth Engine of America<sup>®</sup> – 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<sup>®</sup> 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.

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.

Thor Equities is a global investment firm with a 34 year track record of investing in global urban mixed use real estate. The firm has AUM of \$9 billion and 180 properties in addition to a realized IRR of 24.1% and 2.1x equity multiple over the past 20 years. Thor has offices in US, Mexico, the UK, Spain and France. The firm has a unique insight into commercial real estate markets and trends through its integrated business lines and activities. Logistics benefits from the same fundamentals as traditional retail while providing a natural hedge against some of the biggest risks of globalization, such as e-commerce. With retailers rapidly developing their online platforms, Thor Logistics is a natural extension of Thor’s leading global urban mixed use offering. In the last 12 months, Thor’s dedicated European logistics team has executed transactions of €400 million GAV in urban last mile and logistics assets in the UK, Netherlands and Spain. Thor is actively reviewing a pipeline in excess of €230 million GAV sourced through an extensive network of key occupiers and global logistics operators.



# Keynote Speakers



**Dr. Evan Bedil**  
MD, PM, Marathon Healthcare (Scarsdale)

Dr. Evan Bedil is a managing director at Marathon Asset Management who rejoined the firm in 2017 to lead the Healthcare Structured Credit and Royalty Monetization Investment program. Evan previously worked at Marathon as a vice president and the senior healthcare investment analyst investing in drug royalties and loans. Prior to rejoining Marathon, Evan was a Partner at Healthcare Capital Solutions/Crown Sterling LLC. From 2011 to 2015, Evan spearheaded PDL BioPharma's investments in drug royalties and structured credit that invested over \$750 million. Evan has applicable experience working as a business development consultant at Defined Health between his initial tenure at Marathon and PDL. Following his business school studies, Evan also spent two years at Morgan Stanley in biotechnology equity research. Evan holds an MBA from the Ross School of Business at the University of Michigan and earned his MBBCh (M.D. equivalent) from the University of the Witwatersrand Medical School in Johannesburg, South Africa.



**Lee Shapiro**  
Managing Partner, 7wireVentures (Chicago)

Lee Shapiro is Managing Partner at 7wireVentures, an investment firm he co-founded over a decade ago. He also served as Chief Financial Officer of Livongo Health [NASDAQ:LVGO] until November 2020. Previously he was President of Allscripts [NASDAQ:MDRX] from 2001 until the end of 2012. His leadership was integral in the execution of over \$4B in mergers, acquisitions and financings. His responsibilities included the company's strategy, international operations, business development and partnerships, legal, government relations, health plan initiatives and business activities in the areas of analytics and information services. Prior to stepping in as CFO of Livongo and leading its 2019 IPO, Lee served on the board of the company since its launch, chairing the audit committee and as a member of its compensation committee. During his tenure as CFO, Livongo also had a successful secondary offering, raised \$550M in convertible debt and entered into an agreement to merge at the highest valuation of any healthcare technology company, based on revenue multiples. The price of \$159 per share was over six times the price of Livongo's shares at the time of its IPO, just 12 months earlier. Lee served on the board of directors (audit committee and nominating and governance committee) of Medidata Solutions [NASDAQ:MDSO] until its sale in 2019 to Dassault Systemes. He also served on the board of Tivity Health [NASDAQ:TVTY] until May 2020. Lee chaired the audit committee and also served on the compensation committee. He also serves on the board and committees of various 7wireVentures portfolio companies. For the past 4 years, Lee has been a member of the National Board of Directors of the American Heart Association, where he chairs the audit committee and serves on the business operations committee. He has also been part of Strategic Goal Task Forces. He is a co-founder and board member of The World Innovation Network, the advisory committee of the University of Chicago Innovation Fund Advisory Committee, and the Samsung Digital Health Advisory Board. Based on his industry experience, Lee is a frequent speaker at widely attended industry conferences and is a published contributor to the Forbes Business Council. He has also served as an officer and director of the Gastro-Intestinal Research Foundation (GIRF).

# Speakers



**Yeatts Anderson**  
Principal, Brooklands Capital Strategies (New York)

Yeatts Anderson is a Principal at Brooklands Capital Strategies. Mr. Anderson participates in all aspects of campaign advisory and execution for clients across asset classes. Prior to joining Brooklands Capital Strategies in 2014, Mr. Anderson was a Vice President at Ridgemont Equity Partners, a middle market buyout and growth equity fund. Mr. Anderson was previously a Senior Associate at Banc of America Capital Investors, Bank of America's direct private equity investing platform. Mr. Anderson began his career at Edgeview Partners, a middle market mergers and acquisitions advisory firm. Mr. Anderson received a B.A. in Economics from Davidson College, where he was a William Holt Terry Scholar.



**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).



**Derek Kong**  
Investment Officer, Los Angeles County Employees Retirement Association, (LACERA) (Los Angeles)

Derek Kong joined the Los Angeles County Employee Retirement Association ("LACERA") in 2019 after tenures at Goldman Sachs where he helped lead emerging manager and healthcare fund investing and at Verus Investments, where he recommended new buyout commitments for large U.S. pension plans. Derek began his private equity career executing direct investments at buyout firm Compass Group ("Compass"), where he was instrumental in the firm's investment in Fox Factory Holdings Corp. (Nasdaq: FOXFR), one of Compass' most successful investments. As part of LACERA's in-house co-investments and secondaries team, Derek has been a valued contributor to the pension plan's rapid expansion into both areas and exploration of other alternative PE investment structures. In addition, Derek led the diligence on two new European private equity manager commitments, increasing the \$70 billion plan's international exposure.

# Speakers



**Weichou Su**  
Partner, StepStone Group (Beijing)

Mr. Su is a member of the private equity team, focusing on co-investments and Asian investments. Prior to joining StepStone in 2010, Mr. Su was a managing director of the Hina Group, an investment banking and private equity firm with a focus on Greater China, where he was head of the technology team and led the company's M&A advisory practice. Before that he held a number of operational and investment roles as a senior executive for Asia Pacific with leading telecom and technology companies. Mr. Su was previously managing director and president of the US Information Technology Office in China, where he promoted trade and investment in the technology sector. Mr. Su received his joint MBA from the Kellogg School of Management and Hong Kong University of Science and Technology and MA from the University of Massachusetts at Amherst.



**Nader Sohraby**  
Senior Associate, Alaska Permanent Fund Corporation (Juneau)

Nader Sohraby is a senior associate at the Alaska Permanent Fund Corporation (APFC) focusing on private investments. Prior to APFC, he spent five years working in investment banking, most recently at J.P. Morgan in New York, where he focused on mergers and acquisitions and capital formation across the healthcare industry. Prior to J.P. Morgan, he worked in investment banking at Citi in New York, where he helped execute over \$100 billion in M&A transactions. He began his career at Goldman Sachs in the Global Investment Research division.



**Anna Makki**  
Managing Director, Marathon Asset Management (New York)

Anna Makki is a Managing Director at Marathon Asset Management and brings 16+ years of experience in investment banking and capital markets. Prior to MAM, Anna was a Managing Director on the capital markets desk at Torrey Partners, a global investment banking boutique serving clients in the life sciences industry. Before Torrey, Anna was a Director in Credit Suisse's Esoteric Asset Finance group within Global Markets, where she was responsible for building a financing platform focused on assets backed by intellectual property. Previously, she was an Executive Director at Morgan Stanley in Global Capital Markets and Investment Banking. Anna started her investment banking career at Banc of America Securities. Anna has a B.A., magna cum laude, in mathematics and business administration from Franklin & Marshall College. She also holds an M.B.A. from the Wharton School and an M.A. in international studies from the J. Lauder Institute at the University of Pennsylvania.

# Speakers

## Alex Morgan

Partner, Khosla Ventures (Palo Alto)

Alex Morgan (Twitter: @genomicsdoc) is currently a Partner at Khosla Ventures, a Silicon Valley venture capital firm which invests broadly in technology from seed stage funding to later stage capital. Alex has a special focus in biotechnology, healthcare, data science, and AI/ML and serves on the boards of a number of Khosla Ventures portfolio companies. Alex has an MD and PhD in biomedical informatics from Stanford. As a scientist, he has published over 50 scientific publications, primarily at the intersection of computer science, biology, and healthcare, and has licensed IP to three separate companies. Prior to working in venture capital, Alex was involved with a number of startups, and worked as a senior artificial engineer for the MITRE Corporation. Example Investments: Advanced Chemotherapy Technologies, Arpeggio Bio, Atrendex, BioAge, Bionaut, Cellino, Deep Genomics, DiscernDx, Docbot, Earli, Ellipsis, Faeth, Flow Neuroscience, Fountain Biotherapeutics, Hello Heart, Invoy, Karius, Kernel, Known Medicine, Loop Genomics, Menten AI, Mirvie, Nebula Genomics, Ochre Bio, Oncobox, Overture, Pardes Bio, Prellis, Probably Genetic, Rubedo, Q Bio, StimScience, STIMIT, Syllable Corporation, Vitro Labs

## Andrea Alms

Co-Fund Manager & General Partner , BioHealth Capital Fund (New York)

Andrea Alms is co-fund manager and General Partner of BioHealth Capital Fund, which is a venture capital early stage investment fund created by the BioHealth Innovation (“BHI”), located in Rockville, MD, the center of the BioHealth Capital Region. BHI manages a for profit subsidiary BioHealth Innovation Management (BHIM) which owns equity in 30 of the 110 client companies of BHI and has had 3 exits. In addition, she is founder and Managing Partner of BrookDell, where she specializes in creating and building private equity funds (ranging from venture capital funds, angel funds, private equity, secondary direct funds, to special purpose vehicles) in the biohealth and technology sector. She is partner in several primary and secondary investing funds (e.g., yet2ventures, and Chartline). A recent exit is Jenrin Discovery to Corbus Pharmaceuticals (CRBP:NASDAQ). Also, on behalf of Kuraray (TYO:3405), she helped build its life science business (Elplasia) and realized the M&A exit. Worked several years in wet bench laboratory research at Harvard. Co-author over 20 scientific journals and application notes. Over 15 years’ experience in technology transfer, intellectual property, and contract drafting an estimated 220 agreement on behalf of UVA Patent Foundation (e.g., confidentiality, subscriptions, license, R&D, and MTA). Economics BA (Wellesley College), MBA (Averitt University), and Pharmacology MS (UVA).

## Jamie Rhode

Vice President, Verdis Investment Management (New York)

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

# Speakers

## Jayson Rieger

Managing Partner, PBM Capital (Charlottesville)



Jayson supports new investment evaluation, deal sourcing and provides technical and business support for portfolio companies. Jayson has about 15 years experience in cross-functional scientific and business leadership roles spanning business development, research operations, drug discovery and product development in the life sciences industry. He is an entrepreneurial-minded scientist and business leader with material involvement in multiple successful investor exits. Most recently he served as Corporate Senior Vice President and President of the Human Therapeutics Division at Intrexon Corporation, a synthetic biology company that had an IPO in August 2013 (NYSE: XON). Jayson has also served as the Vice President of Research and Virginia Operations for Clinical Data, Inc. (NSDQ: CLDA), prior to its acquisition by Forest Labs in 2011. Jayson has also held the role of Vice President of Lead Development at Adenosine Therapeutics, LLC, prior to its acquisition by Clinical Data in 2008. Jayson has delivered a number of invited lectures at universities and scientific conferences and has served as a key team member in multiple development programs ranging from discovery stage research to Phase III clinical trials. He is the recipient of more than 10 federal grants, serving as both principal and co-investigator on efforts targeted towards evaluating adenosine receptor agents in a variety of disease indications. He is a co-inventor on more than 25 patents and has authorship on more than 25 peer-reviewed scientific publications. Jayson obtained his Ph.D. from the University of Virginia in Chemistry, has an MBA from the Darden Business School and earned his B.A. from Rollins College.

## Cynthia Green

Managing Director, Connecticut Innovations (New Haven)



Dr. Green is managing director at Connecticut Innovations (CI), Connecticut's strategic venture capital arm and the leading source of financing and ongoing support for innovative, growing companies in CT. Previously, Cyndi led Search and Evaluation in Worldwide Business Development at Pfizer with responsibility for anti-infectives and vaccines; prior to that she was a lead scientist, then business and investor relations/marketing manager at CuraGen. Her technical leadership at Pfizer led to the formation of Pfizer/GSK spin-out ViiV Healthcare, as well as the acquisitions of an anti-infective franchise from AZ and vaccine portfolios from Baxter and GSK. Cyndi's expertise spans the spectrum of drug development in preclinical to marketed assets, technologies, diagnostics and research platforms. In addition to support of CI, she also mentors and provides consultant expertise for a variety of organizations, including ABCT, eLabNYC, Springboard Enterprises and Endless Frontier Labs. Cyndi is a board member at CaroGen Corporation and a board observer for a variety of CI portfolio companies. Prior to relocating back to Connecticut, she was on the board of NewYorkBIO for over a decade and was instrumental in helping foster the growth of biotech in the area. Cyndi received a doctorate in molecular biology at SUNY Buffalo, completed postdoctoral work at Yale University and received an MBA from Rensselaer Polytechnic Institute.

## Sri Sriadibhatla

Associate Director of Investments, Health & Digital Health \* Investment Group, Ben Franklin Technology Partners of Southeastern PA (Philadelphia)



Sri Sriadibhatla, Ph.D. is Senior Manager, Business Development and principle support for life sciences programs. Sri manages the Technology Acceleration Fund (TAF) loan program in the Health & Digital Health Sector. He has over twelve years of experience in technology evaluation, licensing, investment and commercialization. Prior to joining Ben Franklin, Sri was Technology Scout at FMC Corporation and led initiatives in developing, adapting, streamlining, and executing an Open Innovation model. Sri holds a PhD in Pharmaceutical Sciences (Center for Drug Delivery and Nanomedicine) from the University of Nebraska Medical Center.



# Speakers



Andrew Kaminski

Vice President, Cliffwater (Los Angeles)

Chad Phillips

Managing Director, Head of U.S. Office & Portfolio Manager, Nuveen Real Estate (Charlotte)

Chad is responsible for leading a dedicated team of office sector-specialists in local offices around the world. He oversees the overall strategy, performance and day-to-day activities of Nuveen Real Estate's office and life science investments. Chad is a member of the Global Executive Leadership Team and Americas Investment Committee. Prior to joining the firm, Chad was a portfolio manager and managing director at Guggenheim Real Estate, where he oversaw all facets of their U.S. open-end funds, including one that was a member of the NCREIF NFI-ODCE Index. During his 15 year career at Guggenheim, Chad was a member of the Investment Committee and participated in the acquisition of over 90 direct property assets with a gross acquisition value of \$2.6 billion. He started his career as an associate at Bank of America Securities in the Real Estate Investment Banking and Debt Capital Markets groups. Chad graduated with a B.A. from Davidson College and a Master's in Real Estate from Georgetown University.



Cappy Daume

Managing Director Asset Management, The Davis Companies (Boston)

As Managing Director of Asset Management, Cappy is responsible for maximizing value within TDC's real estate portfolio. She serves on the Investment Committee. Prior to joining TDC, she had 20 years of experience in investment sales and leasing of commercial real estate. Most recently, Cappy was the Managing Director in charge of the Jones Lang LaSalle (formerly Spaulding & Slye) Boston Capital Markets Group. During her tenure there, she and her team completed over \$7 billion in investment sales and advisory assignments. Prior to this, Cappy was a leasing broker for eight years. Cappy is a member of the GBREB, PREA, NAIOP, NEWIRE, ULI, and was most recently recognized as one of 10 Outstanding Women Leaders by Boston Real Estates for all of 2021. In 2010 and 2011, she was Co-Chair of the NAIOP Programming Committee and served on the NAIOP Executive Committee. In 2008 and 2009, Cappy was a Co-Chair of the United Way of Boston's Real Estate Fundraising Campaign. Other board experience includes REFA Board Member from 2003 to 2006 and NEWIRE Steering Committee member from 1997 to 2000. Cappy has received numerous awards including Boston's "Top 10" Real Estate Professionals by Women's Business Boston in 2009; CoStar's Power Broker Award in 2007; Boston Business Journal's "40 Under 40" Award in 2003; Boston Magazine's list of Greater Boston's "100 Most Influential Women" in 2003; repeat recipient of GBREB's "Top 5" Investment Sales Person Award and Multi-Million Dollar Sales Award; Forum's Real Estate Power Broker Award in 2006 and 2008; and Banker & Tradesman's "Women of FIRE" Award in 2012. Cappy has a Bachelor of Science degree from Johns Hopkins Carey Business School.



# Speakers

## Joseph J. Sitt

Chairman & CEO, Thor Equities (New York)

Joseph Sitt is Chairman & CEO of Thor Equities, a leader in the global institutional real estate industry with divisions currently spread across three continents and a focus on subniche asset classes. Founded in 1986, Thor Equities owns prime assets in the United States, Europe, and Latin America, with portfolio transactions and a development pipeline spanning 50 million square feet in excess of \$20 billion. Thor has achieved status as a pioneer across various asset classes and the firm specializes in investing in and restoring iconic luxury assets around the globe, specifically the 200-year-old Burlington Arcade in London, the historic Phelan Building in San Francisco, and prized Palmer House Hilton in Chicago. While passionate about preserving the past, Joe's current focus involves emerging asset classes including technology and creative offices, biotechnology and life sciences, and logistics real estate. In addition to Thor Equities, Joe is also Chairman of Thor Urbana, the largest developer in Mexico with a development pipeline of 18 million square feet across the country in key high-growth markets, CEO of Thor Retail Advisors, Chairman of the Global Gateway Alliance, and Chairman and Managing Principal of Thor Urban Property Funds, an investment vehicle serving pension funds, investment banks, top-tier college endowments and foundations.

## Kenneth Bahk

Co-Founder & Managing Partner, Kaleidoscope Health Ventures (Chicago)

Ken Bahk, Ph.D. is the co-founder and managing partner of Kaleidoscope Health Ventures (KHV), a venture-development firm with a mission to realize health equity for all by reinventing the health innovation model. KHV brings together world-class startups, partners, investors and talent to address socioeconomic and health issues while providing high-value services to support a new wave of life science startups and healthcare solutions. Prior, Dr. Bahk spent 19 years in life sciences and healthcare; enabling new technologies from idea to commercialization as a senior executive, venture and impact investor for family offices, and board member for multiple market-leading exits. He has served in thought leadership roles for organizations including the American Association for Clinical Chemistry, Association for Molecular Pathology, the American Society for Microbiology, and for the topic of Innovation for the JP Morgan Annual Healthcare Conference and the White House. Ken is a member of the Board of Directors at Inflammatix, Amalgamated Bank of Chicago, and Project N95. He received his PhD in Biochemistry and Molecular Biology and MS in Neurobiology and Physiology from Northwestern University, and his MBA from the Kellogg School of Management.

# 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 & 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.



# Participation Options

## 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- April 16<sup>th</sup>

Pre-Registration: \$400 USD- April 23<sup>rd</sup>

Standard: \$500 USD

## 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

**\$2,000 USD**





# Participation Options

## 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**





# Participation Options

## PRESENTATION SPONSORSHIP:

- **Speaking Position**
  - Stand-Alone 20 Minute presentation at time of choice during the event
- **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

**\$7,500 USD**



# Participation Options

## VIRTUAL ROAD SHOW SPONSORSHIP

- **Meeting Facilitation/ Post-Event Virtual Road Show**
  - Select targeted LP/GP attendees from Event
  - 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/GP meetings with client and prospective LPs.
- **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.

**\$10,000 USD**



# Participation Options

## EXCLUSIVE SPONSORSHIP :

### • 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

### • Lead Branding

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

### • Speaking Opportunity

- 1 moderating/speaking positions on panel of choice or 45-minute standalone presentation (pending availability).

### • 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.

### • 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.

### • 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**



# 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...

## C-Level Executives

- 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





# 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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