



# The European Real Estate Web Meeting

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**ZOOM & SLACK**

September 8th, 9th, & 10th 2020  
British Summer Time



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**BUSINESS CASUAL ATTIRE**



# The European Real Estate Web Meeting

ZOOM & SLACK– September 8th, 9th, & 10th 2020

Dear Colleague,

It is with great pleasure that I invite you to The European Real Estate Web Meeting. The aim of this Web Meeting is to connect and educate private equity real estate funds, family offices, institutional investors, and other Real Estate investment professionals across Europe and the world. Our online meeting brings together over 300 c-level executives that will join us to virtually network and discuss investment opportunities, allocations, and the current performance of all real estate related asset classes. Panel discussions to be covered include institutional and family office investor perspectives, European private equity real estate investment opportunities and global real estate investment opportunities for European LPs.

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, SEPTEMBER 8<sup>TH</sup> – DAY 1

3:00 pm BST

## Welcoming Address

President, CEO, **Carmo Companies** (New York)

3:05 pm BST

## Panel – European Industrial, Logistics & Storage Outlook

Leading GPs & LPs discuss the current European industrial, logistics and storage real estate market. How has COVID created more demand for industrial investment and development across all major European markets. How resilient is self-storage and what demand is there for Cold Storage?

### Moderator:

**Julian Josephs**, President, **Julian Josephs Company**

### Panelists:

**Max Kreuter**, Managing Director Capital Markets Germany, **Panattoni**

**Michael Underhill**, Chief Investment Officer/CEO, **Capital Innovations**

**Dirk Sosef**, Vice President Research & Strategy, **Prologis**

**Otis Spencer**, Chief Investment Officer, **P3 Logistic Parks**

**David Brush**, Chief Investment Officer, **Merlin Properties**



# Agenda Outline

**TUESDAY, SEPTEMBER 8<sup>TH</sup> – DAY 1**

**4:00 pm BST**

## **Panel – European Residential Outlook**

Leading GPs & LPs discuss the current European Residential real estate market. What demand has there been for Multifamily residential housing in markets across Europe. How resilient is residential in the midst of the pandemic. Residential experts discuss opportunities and threats in this asset class along with allocation appetite for direct and indirect investment.

**Moderator:**

**Steven Edwards**, Real Estate Capital & Advisory, **Saranac Partners**

**Panelists:**

**Robin Hubbard**, Head of Real Estate Capital, **Schroder Real Estate**

**Paul Bashir**, Managing Director and CEO Europe, **Harrison Street**

**Wes Fuller**, Executive Managing Director, **Greystar**

**5:00 pm BST**

**End of Day 1**

# Agenda Outline

WEDNESDAY, SEPTEMBER 9<sup>TH</sup> – DAY 2

2:00 pm BST

## Welcoming Address

President, CEO, Carmo Companies (New York)

2:05 pm BST

## Panel- Foreign LP Appetite for European RE Allocation

Canadian and US Institutional investors discuss the performance of their portfolios and the current strategy/appetite for private equity real estate in Europe. Are they actively deploying capital to funds, co-investments and direct deals? Are LPs committing to funds right now? How are their approaches and tactics shifting? How is the timing of making commitments shifting? What investment strategies do they find compelling? What are profiles of managers? What are the biggest risks and opportunities in the European market?

Moderator:

Terri Troy, CFA, ICD.D , President, Troy Advisory Services

Panelists:

Arnaud Malbos, Head of Investments, Europe, Ivanhoé Cambridge

Vaughn Weatherdon, Head of Real Estate Investment & Advisory, QInvest

Roderick Gomez, Investment Consultant, Eckler Consultants & Actuaries

Romain Marguet, Head of Alternative Investments, Richardson GMP

3:00 pm BST

## Panel- US Opportunities for European LPs

European Investors and US GPs discuss the performance of their portfolios and the current strategy/appetite for private equity real estate in US. What compelling strategies are they seeing across all property types? Are panelists starting to see distressed opportunities? What does it take to work with European capital?

Moderator:

Lee Jackson, Real Estate Investment Partner, Eversheds Sutherland

Panelists:

Lei Farrand, Director, Capital Markets, Kingbird Investment Management

Chad Carpenter, Chairman & Chief Executive Officer, Reven Capital

Coe Schlicher, CEO, Kong Capital



# Agenda Outline

WEDNESDAY, SEPTEMBER 9<sup>TH</sup> – DAY 2

4:00 pm BST

## Panel – European Institutional Investor Perspective

What is the appetite for European Pensions and Insurance LPs looking for indirect and direct real estate investment opportunities? What key factors drive their investment allocations and decisions? How do they do due diligence on managers and deals?

### Moderator:

Bruce Dear, Partner, Head of London Real Estate, Eversheds Sutherland

### Panelists:

Paul Doyle, Director, bfinance

Andrew Angeli, Head of Research & Strategy EMEA, CBRE Global Investors

Byron Beene, CFA, FRM, Sr. Portfolio Manager, Kirchliche Versorgungskassen KZVK und VKPB

Kieran Farrelly, Partner, StepStone Group

Anne Koeman-Sharapova, Principal European Real Estate, Mercer

5:00 pm BST

## Keynote Fireside Chat: A Conversation with Bruce Richards

Bruce Richards is the CEO & Chairman of Marathon Asset Management, an 18B+ AUM investment manager focused on investment in credit and fixed income globally. On this session, Bruce will share the Marathon story share his current view on European and global markets and discuss his strategy of European non-performing loans.

### Keynote Speaker:

Bruce Richards, CEO & Chairman, Marathon Asset Management

### Interviewer:

Walter Stackler, Managing Partner, Shelter Rock Capital Group

5:45 pm BST

End of Day 2



# Agenda Outline

**THURSDAY, SEPTEMBER 10<sup>TH</sup> – DAY 3**

**2:00 pm BST**

## **Real Estate- Virtual Networking/Speed Dating**

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

**Notable Attendees Include:**

Juan Pablo Jimenez, Real Estate Manager, **Inversiones Fray Leon**

Andrew Kaufman, Managing Partner, **ILBen Capital Management**

Oliver Lombardi, Investment Associate, **Alpheus Capital**

Oren Knishinsky, Partner, **Rational Capital Partners**

Vatsula Arun, Investment Manager, **UTSB Management**

Michael Pramik, Investment Director, **Dartmouth College Investment Office**

Anne Koeman-Sharapova, Principal European Real Estate, **Mercer**

Avihay Weiss, Managing Director, Private Equity, **Lighthouse Financial Solutions**

JR Pearce, **Managing Director**, Investment Officer, **Sacramento County Employees' Retirement System**

Jorge Martinez Chavez, Senior Vice President, **Citibanamex AFORE**

Markus Gaebel, Head Real Estate Product Management European Funds, **Swiss Life Asset Managers**

Marc Benjamin, Partner, **Eversheds Sutherland**

Jacques Leuba, Managing Director, **SMT Swiss Mutual Trust**

Jun Hyung Shin, Chief of Representative London Office, **Shinhan Life**

Manfred Kupka, Managing Director, **BRICS Real Estate**

Vaughn Weatherdon, Managing Director, **QINVEST**

Dirk Sosef, Research, **Prologis**

Andrew Kaminski, Consultant, **Cliffwater**

Paul Doyle, Director, **bfinance**

Charles Cooper, Director, **Newport Riviera**

David Sullivan, Head Real Estate Partnerships, North America, **Schroder Real Estate**

Matias Serrano, Head of Finance, **Albatros**

Massimiliano Boschini, Head of Institutional Equity Investments, **Intesa Sanpaolo**

Vatsala Arun, Investment Manager, **UTSB Management**

Vaughn Weatherdon, Managing Director - Head of Real Estate, **QInvest LLC**

Syahmi Shari, Senior Analyst, **Social Security Organization**

Martin Orbetsov, Associate, **Calibrium AG**

**5:00pm BST**

**End of Day 3**



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

Eversheds Sutherland is a global top 10 law practice that has 68 offices across 32 countries within major cities in Europe, the US, the Middle East, Asia, and Africa. As one of the world's largest full-service real estate teams, we are a top tier award winning practice as ranked consistently in directories worldwide. Advising major corporates is a distinct specialism and is core to our business – 65% of the FTSE 100 and 52% of the FTSE 250 rely on us to help them with every aspect of their property portfolios. We provide a bespoke service for the world's leading investors into the UK and European markets, who use and trade in real estate covering the complete project life-cycle from finance, structuring and purchase, through development and asset management to sale and realisation of returns. Our global network of offices allows us to operate in many regulatory environments with clients from a variety of cultural backgrounds with different levels of market and transactional experience. Some of our key clients include Blackstone, Legal & General, Savills Investment Management and Lendlease to name a few.

Greystar offers a broad range of residential investment, development and management services for multifamily and student accommodation. Through our fully integrated model, our local expertise allow us to adapt to the specific needs and requirements of each region, delivering a world-class service throughout Europe. Greystar is the leading manager of multifamily and student accommodation communities in Europe. Through our student platform Chapter and our individual multifamily platforms, we manage property on behalf of our investors, owners and university partners to provide our residents world-class customer service and experiences. Our communities are staffed by local experts who think like an owner and take pride in the performance of their assets. Greystar currently manages over 22,000 multifamily and student accommodation units in the UK.



# Sponsors

## HARRISON STREET

Harrison Street is one of the leading investment management firms exclusively focused on alternative real assets. Since inception in 2005, the firm has created a series of differentiated investment solutions focused on demographic-driven, needs-based assets. The firm invests across senior housing, student housing, healthcare delivery, life sciences and storage real estate as well as social and utility infrastructure, and serves universities, health systems and government users. Headquartered in Chicago with an office in London, the firm has more than 150-employees and approximately \$24.8 billion in assets under management. Clients of the firm include a global institutional investor base domiciled in North America, Europe and Asia.



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



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

# Sponsors



Prologis, Inc. is a real estate investment trust headquartered in San Francisco, California that invests in logistics facilities, with a focus on the consumption side of the global supply chain. The company was formed through the merger of AMB Property Corporation and ProLogis in June 2011, which made Prologis the largest industrial real estate company in the world. As of December 31, 2019, the company owned 3,840 buildings comprising 814 million square feet in 19 countries in North America, Latin America, Europe, and Asia. According to The Economist, its business strategy is focused on warehouses that are located close to huge urban areas where land is scarce. It serves over 5,000 tenants. Prologis created a venture capital arm in 2016. Since 2016, the company has published white papers and its own market research, including the quarterly Industrial Business Indicator and the annual Prologis Logistics Rent Index.



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



As a global investment manager, we help institutions, intermediaries and individuals across the planet meet their goals, fulfil their ambitions, and prepare for the future. But as the world changes, so do our clients' needs. That's why we have a long history of adapting to suit the times and keeping our focus on what matters most to our clients. Doing this takes experience and expertise. We bring together people and data to spot the trends that will shape the future. This provides a unique perspective which allows us to always invest with conviction. We are responsible for £500.2 billion (€590.3 billion/\$662.6 billion) of assets for our clients who trust us to deliver sustainable returns. We remain determined to build future prosperity for them, and for all of society. Today, we have 5,100 people across six continents who focus on doing just this. We are a global business that's managed locally. This allows us to always keep our clients' needs at the heart of everything we do. For over two centuries and more than seven generations we've grown and developed our expertise in tandem with our clients' needs and interests.

# Sponsors



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



## Bruce Richards

CEO & Chairman, Marathon Asset Management (New York)

Bruce Richards is Chief Executive Officer & Chairman of Marathon Asset Management. Mr. Richards is responsible for general oversight of the \$18 billion Marathon manages on behalf of its institutional investors. Mr. Richards leads Marathon's Executive Committee, representing senior leadership at Marathon, where the firm's strategic direction is established. Mr. Richards sits on Marathon's Investment Committee, which convenes weekly to evaluate selected investments and establishes guidelines for asset allocation. Prior to founding Marathon, Mr. Richards worked on Wall Street for 15 years, including 10 years as a Managing Director in the fixed income divisions of Smith Barney and Donaldson, Lufkin & Jenrette where he was head of a trading desk responsible for principal investments and market making. Mr. Richards has demonstrated a strong commitment to philanthropy and was the recipient of Help for Children | Hedge Fund Cares' Award for Caring in 2014 and the CFA Society's Humanitarian Award in 2017. He has also been honored by the UJA Federation of New York and HELP USA, and was the recipient of the Boomer Esiason Foundation's Most Valuable Player Award and the R Baby Foundation's Philanthropic Leadership Award. Mr. Richards serves on the Investment Committee of The University of Maryland. Mr. Richards received his B.A. in Economics, summa cum laude, from Tulane University and is a member of Phi Beta Kappa.

# Speakers

## Julian Josephs

President, Julian Josephs Company (Washington DC)



Julian Josephs, FRICS is an educator, developer and investor based in Washington DC. Originally from the UK, he worked at JLL in the UK and Belgium before basing himself with Hamptons in Paris, France, before completing an MBA at INSEAD in Fontainebleau. He moved to New York and then Chicago, where he advised on developments and investments for European investors with Romanek Golub. He relocated to Washington DC in 1980, where he started his own company, working alongside international investors and has been developing and investing there since. He has taught the Global Real Estate elective at a Graduate Level for 30 years at George Mason, Johns Hopkins University and currently at Georgetown University. He was elected to be World President of FIABCI 2007-8, the International Real Estate Federation, having previously served as President of the US and the UK Chapters. He also served on the RICS Governing Council and Americas Board.

## Max Kreuter

Managing Director Capital Markets Germany, Panattoni (Munich)



Max Kreuter is Managing Director Capital Markets Germany and joined Panattoni in 2015. Max is responsible for investor management and relationships including capital sourcing and structuring for the Panattoni platform particularly in Germany and across Europe. Max Kreuter has 19 years experience in real estate investments. He joined Panattoni from PGIM where he worked 14 years in their Munich and London office. Max held various positions with PGIM including Executive Director and fund manager for a Pan European Open Ended fund, a Value Add fund and a globally investing German special fund. Max holds a MSc in Business Administration and Economics from University of Regensburg.

## Michael Underhill

Chief Investment Officer/CEO, Capital Innovations (Pewaukee)



Michael is Chief Investment Officer at Capital Innovations, LLC and founded the firm in 2007. He is responsible for overseeing all aspects of the firm's quantitative and qualitative investment process, including strategic direction of the firm. As a quantitative economist, he is recognized for his expertise, he is frequently asked to speak on topics such as quantitative finance, investment policy, portfolio management, and the risk characteristics of Real Asset investing. He is a regular contributor to Bloomberg's Market Sense program and Money Moves with Deirdre Bolton. Michael has published widely on international economic and finance topics and is author of the Handbook of Infrastructure Investing. (recommended by the CFA Institute and best seller) A professor at EDHEC University teaching Real Asset Investing and remains one of the world's most provocative, respected financial analysts in the last 25 years. His funds and separate account strategies have won numerous awards for performance in the real assets category.



# Speakers

## Dirk Sosef

### Vice President Research & Strategy, Prologis (Netherlands)

Dirk Sosef is vice president, research & strategy, and is responsible Prologis' research and strategy initiatives in Europe. In Mr. Sosef's current role, his key responsibilities within Prologis are analysing current market conditions and future trends, understanding the factors that drive the (logistics) property performance, and providing research-led strategy and advice to internal and external clients. He also leads and contributes to the development of best-in-class research, demonstrating Prologis' know-how and market insight. Recent areas of investigation include obsolescence, e-commerce, and the most desirable logistics locations in Europe. Prior to joining Prologis in 2011, he worked at Cushman & Wakefield. Mr. Sosef is a member of the Royal Institute of Chartered Surveyors (RICS) and holds a Bachelor's degree in real estate studies from the University of Applied Sciences (Fontys) in Eindhoven.

## Otis Spencer

### Chief Investment Officer, P3 Logistic Parks (Prague)

Otis Spencer joined P3 in May 2018 as CIO, responsible for ensuring the performance of the P3 portfolio meets shareholder expectations. His core role includes the establishment of a long-term strategic investment & divestiture plans, oversight of all M&A activities, and strategic portfolio management. Spencer has 25 years' experience in the European real estate sector. Previously, he was a Managing Director at Peakside Capital and was Co-Head of Europe for Heitman International. He also worked at APG (formerly ABP Investments), ING Real Estate Investment Management and RREEF. Otis is a frequent guest speaker at conferences and features on a number of panels regarding the European property markets and is a member of the office/mixed-use council of ULI. He is a member of the Royal Institution of Chartered Surveyors (MRICS). Mr. Spencer earned his Master's in Business Administration with a concentration in Finance and Real Estate from the University of California, Berkeley, a Master of Real Estate designation from the Universiteit van Amsterdam, and his Bachelor of Science in Business Administration from the University of Southern California.

## David Brush

### Chief Investment Officer, Merlin Properties (Madrid)

Mr. Brush has over 30 years' experience as a real estate professional. He started his career at Philadelphia National Bank in 1983 and moved to Bankers Trust (now part of Deutsche Bank) as a Vice President in 1987. During his 20-year tenure at Bankers Trust/Deutsche Bank Real Estate, Mr. Brush founded the Real Estate Opportunistic investing division, where he was a Global Head and CIO of the business for 13 years. During that time, he supervised the completion of over 150 transactions consisting of real estate acquisitions, equity investments, corporate recapitalisations and distressed loan portfolio acquisitions with an enterprise value in excess of \$50.0 billion. Most recently, Mr. Brush served as Managing Partner at Brookfield Property Group, responsible for the firm's real estate investing activities in Europe, where he closed the £500 million acquisition of Gazeley, a pan-European logistics company (2012). Mr. Brush holds a B.A. degree in Economics from the University of Pennsylvania and is a member of several real estate professional organisations.

# Speakers

## Steven Edwards

### Real Estate Capital & Advisory, Saranac Partners (London)

Steven Edwards leads Saranac's real estate investment and advisory business. He has nearly 20 years of experience in the UK and European real estate markets. He has both advised and invested in all major commercial property classes in both public and private markets covering both debt and equity investments. Over the course of his career he has had lead roles in over \$20 billion of European property transactions – ranging from M&A advisory, IPO's and private debt and equity investments. He previously held senior roles at ARES Management, JP Morgan and Citigroup. Additionally, he serves on the board of Qualco (a Pimco company) and acts as CIO of Bricklane. Steve has a BA from Cornell University.

## Robin Hubbard

### Head of Real Estate Capital, Schroder Real Estate (London)

Schroders has been investing in real estate for almost 50 years and has c.200 people managing more than US\$20bn of assets principally across the UK and Continental Europe. The firm's existing direct, in-house, active asset management approach has been increasingly focused on operational real estate strategies in recent years. Robin joined Schroders in June 2018 where, as Head of Real Estate Capital, he has global responsibility for real estate new product development & management as well as capital raising & investor relations. He has been leading the development of Schroders' strategies in the accommodation sectors of hotels, senior housing and social supported housing. Robin has 30 years of experience of raising private & public equity and debt globally for both corporates as well as investment managers, in senior roles at InfraRed Capital Partners, CBRE Capital Advisors, Rothschild and ABN AMRO. He has a BA from the University of Birmingham and a Masters in Finance from London Business School.

## Paul Bashir

### Managing Director and CEO Europe, Harrison Street (London)

Mr. Bashir joined the firm in 2020 and is Chief Executive Officer of Europe. In this role Mr. Bashir leads the expansion of Harrison Street's European strategies and he is also responsible for overseeing and growing the firm's team of professionals across the U.K. and Europe. Mr. Bashir brings over 20 years of experience in private equity real estate, operations and corporate finance to Harrison Street. Prior to joining Harrison Street, Mr. Bashir was most recently President and Chief Operating Officer at Round Hill Capital, a real estate investment and asset management firm with a global footprint. While at Round Hill Capital, he managed a business with an \$8+ billion portfolio as well as a team of 260 people across 15 offices in 14 countries. He has overseen investment and development projects, regulatory approvals, complex refinancings and capital raises in multiple European locations across a wide array of real estate asset sectors including retail, commercial, residential and student housing. Prior to joining Round Hill, Mr. Bashir served as a Partner at Aggmore Group, where he was responsible for raising and deploying over €500 million of new capital and developed JV partnerships with European operators in the residential and commercial real estate space. Earlier he served as Chief Operating Officer at North Bridge Capital Partners Ltd. Mr. Bashir began his career at KPMG LLP as a senior manager in the transaction services department. Mr. Bashir earned a B.A. in Accounting and Financial Analysis from Newcastle University. Mr. Bashir is ACA qualified and is a member of The Institute of Chartered Accountants in England and Wales.

# Speakers

## Wes Fuller

### Executive Managing Director, Greystar (Charleston)

As executive managing director for Greystar®, Wes is responsible for the company's European business, as well as for the Greystar Investment Management business line, which focuses on investment in rental housing in the US, Europe and Latin America through a series of investment vehicles with institutional clients. Wes is also a member of the Greystar executive committee, the governing body of the company. He holds an MBA in real estate finance from the University of North Carolina's Kenan-Flagler Business School, as well as a bachelor of science in biology from Furman University in Greenville, South Carolina. Wes is a member of the Pension Real Estate Association, the National Multifamily Housing Association, the Association of Foreign Investors in Real Estate, and the Urban Land Institute's Multifamily Blue Council.



## Terri Troy, CFA, ICD.D

### President, Troy Advisory Services (Toronto)

Terri Troy recently retired as CEO of the Halifax Regional Municipality Pension Plan. She has more than 25 years of experience in investment management, pensions, corporate strategy, and mergers and acquisitions. As CEO of the Halifax Regional Municipality Pension Plan, she transformed the governance structure, investment strategy, and customer service function between 2006-2017. Innovative investment strategies implemented included factor investing, portable alpha, and a significant emphasis on private investments including co-investments, syndications/club deals with other large institutional investors, and direct investments, etc. While CEO, Terri was a Board member of Calon Energy, a UK based energy company and a Board member of Alignvest Management, a Canadian financial services corporation. She was a member of Investor Advisory Committees for various global private investments including UK, European and US private equity; UK, Australian and Canadian infrastructure; European, UK, Asian, US and Canadian real estate; and European, UK, and US private debt. Prior to the CEO role, Terri was responsible for the investment strategy for RBC's 33 global pension plans between 2000-2006. Prior to RBC, Terri held various roles at CIBC including corporate strategy, mergers & acquisitions, and wealth management.



## Arnaud Malbos

### Head of Investments, Europe, Ivanhoé Cambridge (Paris)

Arnaud Malbos is in charge of Ivanhoé Cambridge's investment activities in Europe supervising a team of 9 real estate professionals, based in Paris, London and Berlin. Mr. Malbos has 20 years of experience in the real estate industry in Office, Logistics, Retail and alternative uses. He began his career with UNIBAIL-RODAMCO-WESTFIELD in the Office division, being notably in charge of Coeur Défense (from delivery to the syndication, securitization and sale) and Capital 8.12 years ago he joined IVANHOE CAMBRIDGE where he held various positions in investment and asset management and was responsible for numerous major transactions and developments in Europe involving numerous office and logistic transactions, Manco acquisitions, developments, partnerships, fund investment, loan to own, MTO and capital increase on private and public companies.

# Speakers

## Vaughn Weatherdon

### Head of Real Estate Investment & Advisory, QInvest (Doha)

Vaughn Weatherdon is the Head of Real Estate Investment & Advisory at QInvest. In this role, he is responsible for allocating capital to international real estate opportunities, generating sustainable returns for clients based on their specific investment objectives. Vaughn also leads the Real Estate team in developing proprietary investment products that are designed to capture market trends. Since joining QInvest in 2011, Vaughn has concluded investment and advisory transactions totaling US\$ 1.5 billion and has played an instrumental role in successfully allocating funds across credit and multifamily assets, value add mixed-use portfolios and development assets in Europe, the US and the GCC. Vaughn has over 13 years of experience across real estate investing, financing, and advisory in the US, Europe, and the Middle East. He was previously based in Saudi Arabia as a Senior Manager within Samba Capital's Real Estate division. Prior to this, he worked at Wachovia (now Wells Fargo) in the US, as part of its real estate capital markets group. Vaughn holds a BA from the University of Virginia, USA and is a CFA Charterholder.

## Roderick Gomez

### Investment Consultant, Eckler Consultants & Actuaries (Toronto)

Roderick joined Eckler's investment consulting group in 2008 and has 16 years of investment experience. Roderick provides investment strategy advice in different capacities, to a wide range of institutional clients, including corporations, multi-employer pension plans, endowment/ foundations and non-profit organizations. In addition to consulting responsibilities, Roderick is a member of the investment manager research team and has experience in all public and private investments. Currently, his specific area of expertise is alternative investments, particularly infrastructure and real estate. Roderick graduated from Wilfrid Laurier University with an Economics degree in 2003, completed his Canadian Securities Course and is currently pursuing his Chartered Financial Analyst designation.

## Romain Marguet

### Head of Alternative Investments, Richardson GMP (Toronto)

Mr. Marguet is responsible for the oversight of the alternative asset platform for the both the Richardson GMP Private Family Office and Richardson GMP Ltd. , as well as the origination of new global alternative asset products. A role that sees him working in various capacities with asset managers in the hedge fund, private equity, private debt and venture capital asset classes. He also sits on the Investment Committee of a leading Canadian private debt fund. Mr. Marguet started his career in the financial services industry in 2000 with BMO Nesbitt Burns. He has held increasingly senior positions in Canada and internationally. Prior to joining Richardson GMP, he worked for a long-standing hedge fund manager and a boutique private equity firm in Toronto and overseas. Prior to working abroad, Mr. Marguet held the position of Vice President with Raymond James, a Fortune 500 company that had recently established its presence in Canada. Mr. Marguet received an Hon. B.A. in Economics from the University of Toronto in 2003. He is currently active on various industry boards and committees, and fluent in both French and English.

# Speakers

## Lee Jackson

Real Estate Investment Partner, Eversheds Sutherland (London)

Partner Lee Jackson sits within our global real estate practice, based in London. He advises domestic and inward investors on big ticket transactions across all asset classes and sectors, on both a direct and indirect basis. Lee sits on our European real estate board and co-leads our inward investor practice. Lee is client partner for some of our key firm client relationships. Lee's recent market-leading transactions include: the leasing and subsequent corporate sale of a major trophy asset for a private equity investor for c£550m, advising Lendlease on their c£1.5bn programmatic joint venture with CPPIB in the emerging Build to Rent sector, advising a Chinese investor on their c£500m hotel portfolio joint venture with a UK partner, advising a Korean investor on the c£100m 2 Dublin Landings purchase, the first Korean investment into the Dublin commercial real estate market, advising Elite Partners on the establishment of the first "UK" focussed Singaporean commercial real estate fund (and the acquisition of their maiden investment for c£290m). Lee is well known in the international real estate community, presenting at conferences including the "by invitation only" Asian Leaders Conference and has a reputation for creating deals through his global network.

## Lei Farrand

Director, Capital Markets, Kingbird Investment Management (New York)

As Director of Capital Markets at Kingbird Investment Management, Lei is responsible for managing and structuring the firm's relationships with joint venture partners and family office co-investors. Lei has over 15 years of real estate capital markets, asset management, and corporate development experience and has been directly involved in sourcing and structuring over \$850M in cross-border debt and equity financings across property types and the capital stack. Lei held various senior management roles for The Walton Group of Companies, a multinational, privately held group of real estate investment and development companies based in Canada. As Vice President, Capital Markets, she was responsible for developing and managing the firm's relationships in the domestic and international capital markets as well as supporting structured finance products for its residential, mixed-use and development joint ventures, covering capital markets across North America, Asia and Europe. Lei served in a senior management role at Situs, where she led their real estate private equity group and credit practice. Lei began her career at The Vanguard Group in the investment products group as a portfolio advisor in exchange traded funds. Lei holds a Master of Business Administration from Thunderbird School of Global Management with honors and earned a Bachelor of Arts, magna cum laude, from The University of Arizona. She is a member of the Urban Land Institute, as well as a Certified Financial Planner<sup>®</sup> and Certificate Holder with the Board of Standards.

## Chad Carpenter

Chairman & Chief Executive Officer, Reven Capital (La Jolla)

Mr. Carpenter has founded and operated both public and private real estate companies as Chairman & CEO, has 27 years of real estate investing and operating experience and been involved in over \$3 billion in real estate transactions. He has sponsored four private real estate equity funds, acquired, owned and operated over 1,000 commercial and residential investment properties throughout his career. He founded Reven Housing REIT, (NASDAQ: RVEN), a public company in 2012 added value, grew the company and sold it in 2019. Institutional, foreign and high net worth investors have invested with Mr. Carpenter and his sponsored investments.





# Speakers



**Coe Schlicher**  
CEO & Founder, Kong Capital (Austin)

Coe Schlicher is the Chief Executive Officer and Founder of Kong Capital, where he provides strategic direction of the investment strategies, as well as overall leadership of the firm. Prior to founding Kong Capital, Coe launched the Titan Development Real Estate Fund 1 at Titan Development in 2016, where he was Fund Manager, Principal and independently responsible for the Senior Living Group. Previously, Coe worked as CFO of Ernest Healthcare which developed 20 post-acute hospitals and successfully prepared the company for exit, before returning to his engineering background as CEO of Silicon Audio, an Austin based engineering and manufacturing company that focuses on high tech sensor systems. Coe graduated from Washington University in St. Louis with a Bachelor's degree in Mechanical Engineering and earned an MBA from the Kellogg School of Management in Chicago.



**Bruce Dear**  
Partner, Head of London Real Estate, Eversheds Sutherland (London)

Bruce is Head of our London Real Estate group. He has advised on some of the last decade's biggest UK property deals. Bruce specialises in complex commercial structuring for property acquisitions, disposals and development, together with leasing and the full range of strategic asset management. Bruce is listed as a leading City lawyer in Chambers and Legal 500. Legal 500 say Bruce is "exceptional". Chambers say: "Bruce attracts a plethora of accolades, "technically excellent...commercially astute, affable and always looking for innovative ways of getting things done". Over the last twenty years Bruce has published articles on issues of real estate law and policy in among others the Financial Times, The Times, Estate Gazette, Property Week, CityAM and Costar.



**Paul Doyle**  
Director, bfinance (London)

Paul is a director within the client consulting team responsible for relationships with clients in both the UK and Ireland. Prior to joining bfinance, Paul was a director with the fiduciary manager Kempen Capital Management, where he was responsible for the development of client relationships. Previous to this Paul worked within investment consulting at Buck Consultants (now Conduent) as an analyst, helping to advise pension schemes and he also worked as a fund researcher covering DGF's, Corporate Bonds and Hedge Funds. Paul holds a MSc in Finance from University College Dublin and a BComm in Business from University College Cork.

# Speakers

## Andrew Angeli

Head of Research & Strategy EMEA, CBRE Global Investors (London)

Andrew Angeli is a Managing Director based in London, having joined the company and industry in 2007. He is responsible for overseeing and shaping the real estate research capabilities of the European business. He manages a seven-strong team which provides strategic and asset-level research support to our direct and indirect investment teams. Andrew is actively involved in pitching for new business and presenting at client board meetings as well as maintains media relations through a combination of industry conferences and press interviews. Mr. Angeli sits on the European Investment and Portfolio Oversight Committees. Prior to his current role, he headed up the UK research function and has worked in the firm's Los Angeles and Paris offices. Before joining the industry, he worked in real estate planning and environmental consulting roles in the U.S. He holds a Master's Degree in Urban and Regional Planning from the University of Wisconsin-Madison. He is on the Research Steering Group of the Investment Property Forum and a member of the Urban Land Institute's Office and Mixed Use Council.

## Byron Beene, CFA, FRM

Sr. Portfolio Manager, Kirchliche Versorgungskassen KZVK und VKPB (Dortmund)

Byron Beene is Senior Portfolio Manager of a large German institutional investor, responsible for the €1B+ alternatives portfolio. Upon starting his current position in 2016, he implemented a defensive portfolio strategy, staying away from large cap buyouts, venture, RE, and any commodity/energy exposures. Investments over the last 3+ years have focused on less cyclical smaller buyouts, healthcare and tech/digitization. He has more than 10 years' experience in manager research/selection. He has worked for the investment consultancies of both Willis Towers Watson and Aon Hewitt. In New York City, he worked in portfolio management at Invesco Real Estate and later at Cohen and Steer's for their real estate multi-manager fund (PERE funds and co-investments). Byron earned his Bachelors from the University of Tulsa and his Masters from New York University.

## Kieran Farrelly

Partner, StepStone Group (London)

Mr. Farrelly is a member of the real estate team. Prior to StepStone, Mr. Farrelly was a principal at the Townsend Group and a director at CBRE Global Investment Partners where he focused on client portfolio management and investment activity including primaries, secondaries and programmatic ventures. Previously, Mr. Farrelly was a research analyst with M&G Real Estate. Mr. Farrelly holds a Ph.D. in real estate and planning from the Henley Business School at the University of Reading, a master's in economics from the University of Warwick, and is a CFA charterholder.

# Speakers

## Anne Koeman-Sharapova

Principal European Real Estate, Mercer (London)



Anne Koeman-Sharapova is a Real Estate Specialist at Mercer Alternatives based in London. She joined Mercer in 2019 and has been working in the financial services industry, with a focus on real estate, since 2006. Before joining Mercer, she spent the majority of her career at two real estate investment managers, LaSalle Investment Management and M&G Investments, where she worked in a Research & Strategy capacity. She started her career in the research team of real estate agency, DTZ, today Cushman & Wakefield. Throughout her career she has focused on real estate markets in Continental Europe and has gained considerable expertise in this field. She participates in several industry bodies, the Investment Property Forum (IPF), the Society of Property Researchers (SPR) and the European Association of Non-Listed Real Estate Funds (INREV). Anne focuses on researching real estate investment managers with Pan-European portfolios, covering all investment styles. She delivers strategic real estate advice to Mercer clients and represents them at fund investor meetings. She holds the IMC and a professional certification in Data Analysis from the LSE. Her academic achievements have been in Geography and Urban Planning, wherein she holds an undergraduate degree from the University of Amsterdam and a Master of Science from the LSE. Anne is a native Dutch speaker, fluent in English and has proficient working knowledge of German.

## Walter Stackler

Managing Partner, Shelter Rock Capital Group (New York)



Walter Stackler has over 26 years of real estate related experience, including 20 years as sponsor capital raising activities including private investment firms, real estate operating companies and public REITs. Investors in these vehicles have included public and corporate pension funds, sovereign wealth funds, foundations, endowments, insurance companies, commercial banks, family offices and other institutional and accredited investors. Prior to founding Shelter Rock, he was a Managing Director and co-founder of Greenhill's Real Estate Capital Advisory group where he led project management and origination. Walter was previously a Managing Director, Co-Head and a founding member of the Credit Suisse Real Estate Private Fund Group ("REPPFG"), which he joined in 2000 at Donaldson, Lufkin & Jenrette ("DLJ") prior to its merger with Credit Suisse. Prior to the formation of REPPFG in 2000, he was with DLJ's Commercial Mortgage Group where he focused on the origination, underwriting and structuring of multi-family and commercial mortgages. Earlier in his career, Walter was with the Ernst & Young Kenneth Leventhal Real Estate Group where he specialized in distressed debt valuation, feasibility studies and strategic planning. Walter holds a BS from the University of Richmond and an MBA from Columbia Business School.

# 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-

**Pre-Registration:** \$400 USD-

**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)

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

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

- **Speaking Opportunity**

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

- **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+** Real Estate Investment Firms/ Funds
- 6** Industry Exclusive Panel Sessions
- 3** Hours of private virtual networking/speed dating
- 3** Day Zoom Web Conference
- 7** Days of Slack networking tool access



# In Attendance...

## C-Level Executives

- European focused Private Equity Real Estate Funds and Real Estate Investment firms
- European focused 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 Private Equity & Venture Capital Web Meeting

*September 28th, 29th & 30th 2020*  
*Singapore Standard Time*

## The Private Market Secondaries Web Meeting

*October 8th & 9th 2020*  
*Pacific Standard Time*

## The Asia/Pacific Institutional Real Estate Web Meeting

*October 27th, 28th & 29th*

## The Latin America Institutional Real Estate Web Meeting

*November 10th, 11th & 12th 2020*  
*Brasilia Time*

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

*Decemeber 8th, 9th & 10th 2020*  
*Brasilia Time*

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.

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Thank You

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