



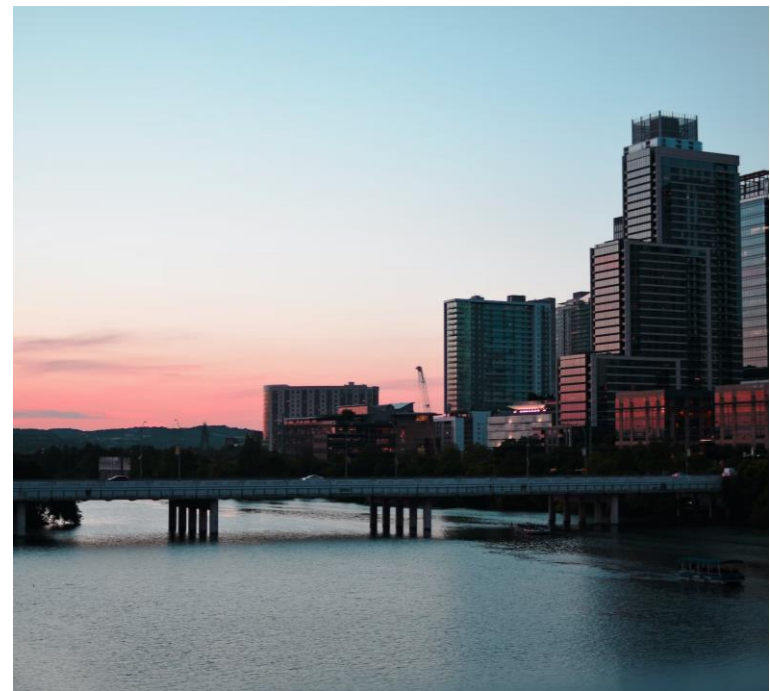
THE PRIVATE MARKETS TEXAS MEETING

Austin Proper Hotel, Austin, Texas
October 18th & 19th, 2023



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THE PRIVATE MARKETS TEXAS MEETING

AUSTIN PROPER HOTEL, AUSTIN, TEXAS
OCTOBER 18TH & 19TH, 2023

Dear Colleague,

It is with great pleasure that I invite you to join us at the 6th Annual Private Markets Texas Meeting during F1 week in Austin. This exclusive institutional gathering brings together the most important and active institutional allocators and family offices in Texas that are investing in Global Private Equity, Venture Capital, Secondaries, Private Credit and Real Assets. Over 150 C-Level LP & GP professionals will come together to network and discuss investment opportunities, allocations, and the performance of all Private Markets related asset classes.

We look forward to hosting you in Austin!

Best,

Roy Carmo Salsinha
President, CEO
Carmo Companies



BY THE NUMBERS

- \$5+ Trillion AUM in attendance
- 150+ Total participants
- 75+ Institutional & Private Wealth Investors
- 75+ Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking/Speed Dating
- 2 Networking Cocktails





IN ATTENDANCE

C-Level Executives

- Corporate Pension Funds
- Endowments
- Foundations
- Private Equity Funds, Venture Capital Firms, Real Estate Firms,
- Hedge Funds
- Public Pension Funds
- 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

INSTITUTIONAL PARTNERS





2023 LEAD SPONSOR



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



2023 SPONSORS



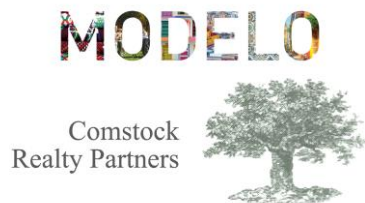
Atwater Capital is a private equity investor providing capital and value-added operational strategy and support to companies primarily in the Media sector. Headquartered in Los Angeles, Atwater’s mandate is to apply its deep sector expertise to invest thematically, deploying capital into opportunities poised to benefit from secular trends. Atwater is currently investing from Atwater Capital Fund I, LP (the “Fund”), a market-distinctive fund focused exclusively on making investments in growth to late-stage companies, predominantly in the Media and Entertainment industries, that can benefit from Atwater’s operational value add. In 2022, Atwater announced strategic alliances with affiliates of Goldman Sachs Asset Management’s Petershill and KKR. As part of the strategic alliances, Goldman Sachs and KKR made anchor commitments to Atwater’s inaugural Fund. Atwater manages approximately \$500 million and its current portfolio companies include Epidemic Sound, Plan B Entertainment, Mediawan Leonine Studios, wiip Productions, 88rising, GFK, and Freepik.



Carmo Hunter offers a consultative, high-touch approach and aim to foster relationships with our clients to better understand hiring needs, plans for growth and long-term vision. We can help you selectively source top talent across the country by creating a strategic recruiting solution that is specific to each company and firm. Carmo Hunter is a joint venture between San Francisco based Hunter SF and New York based Carmo Companies. We execute junior level to senior management positions.



CCMP Growth is focused on making lead buyout and growth equity investments in middle-market companies in the Consumer and Industrial sectors (together the “Core Sectors”), primarily in North America. The Firm seeks to make equity investments of \$50 to \$200 million (including limited partner co-invest) in companies typically with enterprise values of \$250 million to \$1 billion. CCMP Growth Advisors, LP was formed in June 2022 as a successor to CCMP Capital Advisors, LP by certain investment professionals of CCMP Capital for new investment opportunities. CCMP Capital has a multi-decade history of delivering strong returns across multiple market cycles and industries.



Comstock Realty Partners specializes in the value-add and opportunistic acquisition and repositioning of urban infill properties throughout California. Comstock presents its most exciting opportunity, The Los Angeles Modelo Project—an entitled and permit-ready development comprising 850 market-rate multifamily units and 195,000 SF of essential and entertainment retail. This project is strategically located along 1,000 feet of frontage of the 5 freeway, catering to 386,000 vehicles per day. Comstock invests its own equity in every asset within its portfolio and has established partnerships with institutional investors, hedge funds, and syndicates of high-net-worth individuals to capitalize on its projects.



2023 SPONSORS



Evolence India Fund (EIF) is a onestop shop for private market investments in India operating since 2005. With an integrated approach to investing, EIF diligently blends FoF (upto 30%), Co-Direct Investments (upto 70%) and Secondaries (both LP positions and Directs) and deliver attractive returns at no additional costs to an Investor. Currently on Fund IV and EIF has deployed about US\$850mn in India across Financial Services, Health Care, Consumer Products & Services and Technology. About 80% of our capital is from US investors (Pension Funds, Endowments, Insured Companies and institutionalized family offices) and the remaining from Europe and Middle East. EIF has one of the most established and experienced investment team in Indian PE/VC today and we provide investors access to some of the most attractive and sought after opportunities in the Indian PE/VC landscape. Our niche strategy, active engagement model and demonstrable track record differentiate us. ajit@evolence.com



Frontline Healthcare Partners (FHP) is a Charleston-based private investment firm focused exclusively on making control investments in small-cap, distributed healthcare businesses. FHP has consummated four platform investments (child and adolescent psychiatry, ABA therapy, infusion services, and SUD treatment) and four add-on acquisitions since January of 2022, and is targeting a final close for Fund I in Q1/Q2 of 2024. The firm brings together Striker Partners, with more than 20 years of principal investing experience in small-cap businesses, and the merchant banking arm of Allen Mooney & Barnes, with a decade of experience providing financial advisory services to the healthcare industry. The FHP team has extensive deal experience, complemented by superior sector knowledge in healthcare, and a strong track record of investing capital in lower-middle market businesses.



Founded in 2013, HealthQuest Capital is a private asset firm that provides capital to transformative healthcare companies. Our focus transcends healthcare modalities and sectors, honing in on commercial prospects that drive enhanced patient outcomes and elevate the efficiency of healthcare delivery. This includes medical products, diagnostics/tools, healthcare IT, and innovative services. With a portfolio spanning diversified healthcare sectors and geographical domains, particularly emphasizing the US, HealthQuest currently manages approximately \$2 billion. Our approach is underscored by adaptability and an open-minded assessment of opportunities, complemented by ties to a diverse healthcare network. We actively seek investments that have innovative potential, capitalizing on our combined experience as investors and healthcare operators to fundamentally change the trajectory of a business.



Learn is the first and leading venture capital firm focused on the \$6+ trillion global human capital development sector spanning formal and informal education, future of work, social services, quantified wellness, cognitive technology, and more. Since pioneering the venture-backed sector 13 years ago, Learn (\$1bn+ AUM) has become the go-to brand for founders and has backed an expanding list of \$1bn+ companies, including Coursera (NYSE:COUR), Udemy (NSDQ:UDMY), Nerdy (NYSE:NRDY), Andela, Amplify, Brainly, Outschool, et al., and emerging breakouts in the human capital development sector. Currently raising their Fund V family, Learn has already closed on two-thirds of their target with the backing of a global base of Limited Partner including leading institutions (JP Morgan, UBS, IFC), family offices (Ray Dalio, Alan Howard, Lauren Powell Jobs), strategics (Pearson, Advance Publications), and family foundations (Jacobs Foundation, George Kaiser Family Foundation), etc.



2023 SPONSORS



Napier Park is a \$20.4bn alternative asset management firm focused on investment opportunities in alternative credit. Strategies range from credit funds covering major US and European markets with AUM of \$5.3bn, through a global CLO platform with \$13.5bn under management to a Real Asset Leasing Strategy managing \$1.6bn of capital.(1) Napier Park has a strong track record and investment process, institutional quality infrastructure, and long-term institutional investor capital commitments. The senior team has spent more than a decade developing the firm to take advantage of the post-crisis world of intermittent liquidity and volatility driven by regulatory change. Investors look to Napier Park for uniquely-packaged credit exposures that offer an attractive absolute return while structurally limiting downside risk.



Located in North Carolina's Research Triangle, NovaQuest was founded in 2010 by a team of accomplished industry professionals who began working together in 2000. A premier biopharmaceuticals investment firm, NovaQuest pioneered a PRODUCT FINANCE™ capital solution for the industry, providing at-risk, non-dilutive funding that enables partner companies to advance pivotal clinical trials, launch new brands, license products, and acquire accretive products. With more than \$2.5 billion raised across four funds, NovaQuest has invested in scores of biopharmaceutical assets across therapeutic areas with a clinical success rate significantly higher than the industry average. NovaQuest has investment platforms in human and animal health verticals.



Peachtree is a private equity investment, asset and fund management firm focusing on opportunistically deploying capital across its distinct operating and real estate divisions, including hospitality, commercial real estate lending, residential development, and capital markets. Since its founding in 2008, the company has completed hundreds of real estate investments valued at more than \$8.2 billion in total market capitalization and currently has more than \$2.5 billion in equity under management. For more information, visit www.peachtreegroup.com.



PEAL Capital Partners is a female-founded, European based, lower midcap private equity firm specializing in control investments. The senior team have worked together since 2006 and built up a strong track record across multiple economic cycles and regions. The PEAL Fund focuses on the rapidly growing area of Longevity and Hormones ("L&H") and to date, they have closed two deals in the area of medical training. These deals have given them access to 92 doctors who come from a variety of disciplines. These doctors are helping PEAL research and source companies with sustainable business models in the areas of male and female hormones, blood testing and pharmacy to support longevity-focused training and clinical services. The PEAL team are raising \$120m for this Fund which will allow plenty of room for LP co-investment.



2023 SPONSORS



Pearl Energy Investments (“Pearl”) is a Dallas, Texas-based investment firm founded in 2015 focused on the North American energy sector. The firm typically targets opportunities requiring \$25 million to \$150 million of equity capital with an emphasis on upstream energy. Pearl has \$1.9 billion of committed capital under management and most recently closed Pearl Energy Investments III, L.P. and its affiliate funds with over \$700 million in total commitments in March 2023.



Pearlstone Partners is a real estate development firm with over 100 years of combined experience in the Austin market. The company has been responsible for \$600+ million in locally developed real estate and has \$700+ million actively invested in their growing portfolio and pipeline. Pearlstone Partners engages in the economic development of the Central Texas area by creating high-quality, profitable real estate development projects. We develop investment opportunities, expand the local market’s real estate offerings, and sustain a long-term market position for ourselves and for our clients.



Rhône, established in 1996, is a global private equity firm with a focus on investments in businesses with a transatlantic presence. Rhône’s investment philosophy includes the development of strong, strategic partnerships with the companies in which it invests. Rhône has a consistent history of successful corporate carve-out transactions and working with entrepreneur and family-led businesses, and operates across its London, New York and Madrid offices. Rhône has invested in a diversified portfolio of companies including investments in the consumer, industrial and business services sectors. For more information about Rhône, its investment professionals, and its current portfolio, please visit: www.rhonegroup.com.



Built specifically for rising, uncertain rate environments, RMWC’s short-term, low loan-to-value, floating rate, primarily senior secured exposures are specifically designed to perform well in current market conditions. Coleman Andrews, Co-founding Partner of Bain Capital, and Steven Fischler, a veteran of the 2008-2011 Lehman real estate recoveries, lead RMWC’s team of 13 professionals. By emphasizing capital preservation under all circumstances, over the past 11+ years RMWC averaged realized annual loan losses of 1 basis point. RMWC is accepting new capital into Fund IV, which is currently generating net annualized returns of 11-13% with REIT-based tax advantages.



2023 SPONSORS



SDI is a U. S. boutique investment firm focusing on a niche investment strategy: under performing debt backed by commercial real estate assets throughout the United States. Founded in 2009, our current team has been together for 7+ years, covering distressed CRE assets with strong performance during both upcycles and downcycles. Each senior management team member has 10+ years of experience with vast knowledge across an array of disciplines including property management, finance, capital markets, acquisitions, law, development, sales, and leasing. SDI has implemented and refined an origination and underwriting process to successfully acquire, manage, and reposition distressed loans and REO leading to opportunistic returns. Our Asset Management team is another cornerstone of our value proposition - the team is comprised of seasoned professionals that bring a common sense and hands on business approach. SDI focuses on what we call the small balance loan market – we concentrate on opportunities in the US\$3-25 Mn range with our sweet spot between US\$5-15 Mn. Our holistic approach seeks to generate alpha by focusing on the highest portion of the capital stack (senior debt) while generating equity-like returns with a lower risk profile compared to other alternative investments.



Founded in 2010, Star Mountain Capital is a lower middle-market direct lending manager focused on two investment strategies: 1) providing debt and equity capital to established, growing small and medium-sized companies; and 2) purchasing LP positions, generally at a discount, from other investors in lower middle-market funds. Star Mountain manages ~\$3.5 billion of AUM through funds and SMAs for some of the world's most sophisticated investors, including individuals, family offices, insurance companies, wealth managers, endowments / foundations, and public / corporate pension plans. Star Mountain is 100% employee-owned and 100% of employees share in the investment profits across 100+ team members and senior advisors/operating partners. Star Mountain's specialty is helping grow privately-owned businesses, both organically and through acquisitions, that have at least \$15 million of annual revenues and under \$50 million of EBITDA. Star Mountain has closed ~200 direct investments and 35+ secondary / fund investments since its inception.



Founded in 1997, Trez Capital is a diversified real estate investment firm and preeminent provider of commercial real estate debt and equity financing solutions in Canada and the United States. Trez Capital offers private and institutional investors strategies to invest in a variety of opportunistic, fully secured mortgage investment funds, syndication offerings and real estate joint-venture investments; and provides property developers with quick approvals on flexible short- to mid-term financing. With offices across North America, Trez Corporate Group has over \$5.3* billion CAD in assets under management and has funded over 1,700 transactions totaling more than \$17 billion CAD since inception. For more information, visit www.trezcapital.com. (*Trez Corporate Group AUM includes assets held by all Trez-related entities as well as \$3.0 billion Manager AUM (Trez Capital Fund Management Limited Partnership)).



Working with clients across the alternative investment community, including over 2,500 funds, Weaver knows how to deliver services with efficient processes that relieve your operational stress. We have decades of experience in accounting, tax and regulatory reporting, valuation of complex financial instruments, and development of strong internal controls. When it comes to your audit, tax and advisory needs, Weaver helps you fulfill your due diligence and compliance obligations while managing risk and cost with comfortable transparency.



2023 SPONSORS

ZCG

ZCG is a leading, privately held merchant bank comprised of private markets asset management, business consulting services, technology development and solutions. ZCG Principals have had industry leading track records in private market asset management for almost 30 years. ZCG manages approximately \$7B of AUM and its investors are some of the largest and most sophisticated global institutional investors including pension funds, endowments, foundations, sovereign wealth funds, central banks, and insurance companies. ZCG has a global team comprised of approximately 400 talented professionals.



KEYNOTE SPEAKER



Dawn Buckingham

Commissioner, The Texas General Land Office (Austin)

Commissioner Buckingham's family were among the first settlers to Texas seven generations ago, and that tough, independent, pioneer spirit is deeply rooted in her personality. True to her Texas roots, her commitment to service began early, serving as a volunteer firefighter, and attending the Texas A&M Fire School. She is also an avid hunter, outdoorswoman, and steward of the land. She made history in 2016 as the first woman elected to the Texas State Senate from Travis County. Without slowing down, she made history again in 2022 when elected as the 29th, and state's first female Commissioner of the General Land Office, Texas' oldest state agency. Dawn came from humble roots—growing up on a ranch near the Texas coast and then moved to Central Texas. She has never settled for less than her dreams. Wanting to attend college, but without the money to do so, Dawn lived at home, working two jobs to pay her own way through college at the University of Texas at Austin. With endurance of spirit she graduated Magna Cum Laude and debt-free. It was during college that she met the love of her life and husband of 31 years, Ed Buckingham. Dawn and Ed both received their medical degrees from the University of Texas Medical Branch at Galveston, and they have two children. Dawn then went on to become a successful Oculoplastic Surgeon. Her commitment to service and recognition for her work has allowed her to hold leadership positions in local, state, and national medical organizations. Dawn embodies the American Dream. Through hard work, a "never-quit" attitude, and perseverance, she has risen above her circumstances. Becoming a self-made small business owner employing Texans, serving others in her profession and as an elected official, she has always given back to her community. As your Land Commissioner, Dr. Dawn Buckingham brings a lifetime of experience to the office. She is committed to helping Texans after a disaster, supporting Texas energy, ensuring that every child in Texas receives a high-quality public education, serving Texas Veterans, and securing the border to keep our communities safe.



Britt Harris

Acting CEO, Texas Permanent School Fund Corporation (Austin)

Mr. Harris is currently serving as interim CEO of the Texas Permanent School Fund which is the second largest Sovereign Wealth Fund in the US. Previously he was CEO of UTIMCO, which is the first external investment corporation formed by a public university system and oversees investments for The University of Texas and Texas A&M Systems. Mr. Harris served as the Chief Investment Officer for the Teacher Retirement System of Texas (TRS) which is among the 25 largest investment funds in the world. Prior to his arrival at TRS, he was the CEO for Bridgewater Associates and was also the CIO and President for Verizon Investment Management Corporation. Mr. Harris is an advisor to the US Federal Reserve, a former member of the President's Working Group on Financial Markets and is an Executive Professor for his course "Titans of Investing" at both Texas A&M and the University of Texas. He has been consistently named among the top five asset investors in the world and was honored with a lifetime achievement for distinguished service to the financial industry.



Mike Krems

Partner, Private Equity Portfolio Strategies, Aksia (San Diego)

Mike is on the Portfolio Advisory team and has over 19 years of private equity, credit and co-investing experience. He is responsible for alternative investment portfolios in the Americas with a focus on developing private equity portfolio strategies and building co-investment portfolios. Prior to Aksia's acquisition of TorreyCove Capital Partners, Mike was a Managing Director of TorreyCove Capital Partners, where he was responsible for the identification, due diligence, and selection of private equity and credit investments, including co-investments. Prior to that, he was a Senior Vice President at Pacific Corporate Group in a similar capacity. Mike previously worked at Smith Breeden Associates, a fixed income money manager where he worked on the corporate bond trading desk. Mike graduated from Duke University with a BS in Economics. He holds an MBA from the Wharton School at the University of Pennsylvania and is a CFA charterholder.



Greg Friedman

Managing Principal, Chief Executive Officer, Peachtree (Atlanta)

Greg has successfully led Peachtree in more than \$6.0 billion in hotel acquisitions, investments and development since co-founding the company. Greg has more than 22 years of hospitality experience with an emphasis on deal-structuring and financing. He was formerly Senior Vice President of Business Development for Specialty Finance Group, LLC, a direct lender providing hotel-first mortgage and FF&E financing, originating more than \$2 billion of hotel debt. Previously, Greg was Vice President of Business Development for GMAC Commercial Mortgage's Asset-Backed Lending Division. He originated, closed, and funded more than 300 hospitality FF&E financing transactions with an aggregate capital structure exceeding \$10 billion during his six-year tenure. Greg holds a Bachelor of Arts in Biology from the University of Texas at Austin. He currently is a board member for the American Hotel & Lodging Association.



Matt Denbleyker

Co-Chief Investment Officer, OCIO Solutions, Commerce Street Investment Management (Dallas)

Matt currently serves as a Managing Director and Co-CIO for Commerce Street Investment Management's Outsourced Chief Investment Officer (OCIO) business. He has over 20 years of institutional investment experience working at public pensions funds, endowment, foundation and family office investment consulting firms. Matt is responsible for overseeing the investment research and development of the firm's OCIO investment platform. He has extensive investment experience in leading the research, due diligence and portfolio construction for a diverse range of investment strategies, including private equity (buyouts, special situations, venture capital), private debt, hedge funds and real assets strategies. In a previous position, Matt served as head of research for a regional investment advisory firm, Larry Thompson & Associates, that provided a full range of investment solutions for endowment, foundation and family office portfolios. More recently, Matt served in positions as vice president of research for Fund Evaluation Group and as head of private markets research for GSFR in Dallas. Matt Received his BBA and MBA in Finance from University of Texas at Arlington and completed post-graduate studies at the LBJ School of Public Affairs at University of Texas at Austin. He received the Chartered Alternative Investment Analyst designation and serves as the chapter head of the Dallas Chartered Alternative Investment Analyst Association.



Brian Teefey

Partner, Transaction Advisory Services, Weaver (Dallas)

Brian Teefey, CPA, has more than 12 years of experience in professional services, advising clients on accounting, finance and business processes. He has worked with private equity firms, investment banks and strategic middle-market clients on various buy-side and sell-side engagements. Brian has significant experience in financial and operational due diligence, including but not limited to, quality of earnings analyses, working capital analyses, carve-out and add-on acquisitions, business process and purchase agreement reviews and evaluation of internal control structures for various industries. Brian earned both a Master of Accounting and Bachelor of Science in accounting from the University of Kansas.



Eric Yu Chang

Co-Founder & Partner, Melange Capital Partners (Austin)

Eric Chang is a co-founder and partner at Melange Capital. Most recently, Mr. Chang was a Director at Teacher Retirement System of Texas (“TRS”), a \$200 billion trust, where he invested private capital for Energy, Natural Resources and Infrastructure (“ENRI”). In this role, he oversaw the investment of \$4+ billion of capital. At TRS, Eric served the internal ENRI Investment Committee and numerous external limited partner advisory committees (“LPACs”) where he developed unique relationships with sponsors and gained a distinct unparalleled insight into portfolios, valuation methodologies and governances. Eric has served as board observer for Black Mountain Sand, GridTek and TRP Energy. Prior to joining TRS, Eric worked at a private equity backed energy company. Eric began his career in Houston in the Oil & Gas group at Credit Suisse and later worked at Kayne Anderson investing in midstream assets. Eric received his BBA in Finance and BA in Economics with honors from the University of Texas at Austin.



Joncarlo Mark

Founder, Upwelling Capital Group (Sacramento)

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

Brett A. Hickey

Founder & CEO, Star Mountain Capital (New York)



Brett Hickey is the Founder & CEO of Star Mountain Capital, LLC, a specialized U.S. lower middle-market investment firm. Star Mountain employs a data-driven approach to provide value-added debt and equity capital to established small and medium-sized companies leveraging its large market expertise, scale-driven resources, and longstanding relationships. Star Mountain also has a secondary fund investment business. Brett has been investing in this end of the market for over 15 years and began his career as an investment banker at Citigroup / Salomon Smith Barney. Mr. Hickey graduated from McGill University with a finance and accounting degree. He is an alumnus of Harvard Business School via its Owner/President Management executive leadership program. He Chair's Star Mountain's Charitable Foundation which supports the career development of women, veterans and athletes as well as health & wellness initiatives including cancer research. He is a member of YPO and on the global boards of Harvard Alumni Entrepreneurs and Help for Children. Additionally, Brett is a former Canadian national gold medalist speed skater.

Rogelio Prieto

PE Manager, Arzentia Capital (Monterrey)



Rogelio is PE Director at Arzentia Capital, a Monterrey-based Family Office that invests in Private Equity, Public Markets and Real Estate. Rogelio leads Arzentia's direct investment strategy, overseeing minority growth and buyout investments primarily in healthcare, education and financial services mostly in companies with high growth potential, innovative business models and proven management teams across multiple sectors. He previously worked at Booz&Co, a management consulting firm for over 6 years. He is a current Board Member for Dentalia, Ver de Verdad, Pecan Grove Farms, Hydral and Reina Madre. He formerly represented the Family Office group as a board member at AMEXCAP. Rogelio holds an MBA from London Business School and has a BS in Mechanical Engineering from ITESM.

Elizabeth Burton

Managing Director and Client Investment Strategist, Goldman Sachs (New York)



Elizabeth Burton is a managing director and senior client investment strategist in Client Solutions Group (CSG) at Goldman Sachs as a managing director and client investment strategist in New York. In this new leadership position, Elizabeth advises Goldman's institutional clients on their investment strategy and portfolio objectives, working alongside our global client advisors and product strategists across public and private markets. She was most recently the Chief Investment Officer of the Employees' Retirement System of the State of Hawaii ("HIERS"), where she oversaw \$22 billion in pension fund assets. Ms. Burton is also on the Board of Directors of the Chartered Alternative Investment Association (CAIA). Prior to joining HIERS, Ms. Burton served as Managing Director of the Quantitative Strategies Group at the Maryland State Retirement Agency. In this role, Ms. Burton was responsible for the \$4.5B Absolute Return Portfolio and for risk management oversight of the \$55B Plan. Ms. Burton joined the Agency in July 2016. Previously, Ms. Burton owned William Street Advisory—a strategic advisory practice which she founded in 2013. Prior to that role, Ms. Burton was a Senior Economist and Expert Witness with Criterion Economics. Prior to that role, Ms. Burton was a Consultant at First Annapolis where she worked on M&A transactions and consulting the payments industry. Previous positions include: Co-Portfolio and Quantitative Risk Analyst with a South Africa-based fund of hedge funds, Trader (fixed income securities) for a risk management firm, and Portfolio Management Associate with a quant-focused fund of hedge funds.



Coleman Andrews

CEO, RMWC, Co-founder, Bain Capital (New York)

Coleman is the Founder, Chief Executive Officer, and Co-Owner of RMWC. RMWC's strategies benefit from Coleman's diverse experience at Bain Capital and Bain & Company, his prior experience as CEO of two global companies, and his observations gained, and lessons learned through several economic and market cycles. Coleman is a member of the Board of Directors of the DAPER Investment Fund, a co-investment fund of the Stanford Management Company, the entity which directs the investment of approximately \$40 + billion of endowment and related funds for Stanford University. Coleman served for 15 years as a global advisor to Trilantic Capital Partners, a private equity firm managing \$6.0 billion of assets. Coleman was Co-Founding Partner of Bain Capital and a Partner of Bain & Company. He holds an M.B.A. from Stanford University, where he was named an Arjay Miller Scholar, and holds a B.A. from Dartmouth College, High Honors in Economics, magna cum laude, where he was a Rufus Choate Scholar.



Daniel Krikorian

Principal, StepStone Group (Nashville)

Dan is a Principal on StepStone's Private Equity investment team with a focus on US-based Small Buyout managers, including primary funds, co-investments, and secondaries. Prior to StepStone, Dan was an Associate at CapitalSpring, a private investment firm specializing in the multi-unit and franchised restaurant sector. Before that he worked for the Office of Investments at Ohio State University, where he was involved in private markets manager selection, diligence, and portfolio monitoring. StepStone Group is a global private markets investment firm focused on providing customized investment solutions and advisory and data services to our clients. StepStone partners with clients to develop and build private markets portfolios designed to meet their specific objectives across private equity, infrastructure, private debt and real estate asset classes.



Tom Tull

Former CIO, Employees Retirement System of Texas (Dallas)

Tom Tull, CFA, with 40+ years of investment experience in both private and public capital markets was the Chief Investment Officer at the Employees Retirement System of Texas (ERS) where he managed a \$36 billion Trust. While at ERS Mr. Tull has been involved with over 200 completed investment transactions totaling \$13 billion encompassing private equity, private real estate, global credit, hedge funds and special situations. Previously, he was a founding partner of Gulfstream Global Investors, Ltd., an SEC-registered investment adviser specializing in international equity management that was sold to West LB of Germany in January 2001. Mr. Tull is the former Director - Employee Benefit Fund Investments for The LTV Corporation and also served as President of Western Reserve Capital Management, Inc., the pension asset management subsidiary of The LTV Corporation. In this capacity, he was responsible for the investment of a \$1.2 billion retirement trust. Prior to joining LTV in February 1983, Mr. Tull served for seven years as Director - Pension Investments of The Cleveland-Cliffs Iron Company. He managed an in-house pension fund, introduced international investing and other diversification policies and performed a variety of corporate duties including corporate acquisitions. His investment career began in 1971. Mr. Tull received a B.S. in Finance from Ohio State University and an M.B.A. from Xavier University, and is a CFA® Charterholder. He also is a Board member and Advisory Board Member of a variety of organizations such as The Dallas CFA Society, The Long Center Endowment, and The Dallas Police & Fire Pension. Mr. Tull is a U.S. Army veteran with service time in both Korea and Vietnam.



Patrick Jordan

Managing Partner, NovaQuestCapital Management (Durham)

Patrick Jordan, Managing Partner at NovaQuestCapital Management has over 25 years of leadership in the healthcare industry across life sciences, data and analytics, payers and providers and specialty financing. Over a 20-year career at Quintiles (now IQVIA), he led the company's global accounts, oversaw over \$1bn in annual client engagements, and instituted a managed partnership strategy that was recognized in Harvard Business Review. He was instrumental in the launch and leadership of a new business vertical servicing healthcare provider systems with health information analytics and technology services. He leads the firm's operations and is a member of the investment committee. Mr. Jordan earned a BA from Duke University, MA from the University of Durham, United Kingdom MBA with a concentration in Health Sector Management from the Fuqua School of Business at Duke University.



Richard Brekka

Managing Partner and co-founder, Second Alpha Partners (New York)

Richard Brekka is a Managing Partner and co-founder of Second Alpha. He is a passionate spokesman for the importance of secondary investing to the overall health of the innovation economy. For more than twenty years, Richard has invested in growth-oriented tech companies – particularly software-as-a-service, mobile content, communication services and Internet opportunities. He currently serves on the board of TeraGo Networks (TSX: TGO) and is a board observer to Prove Identity, Inc. Prior to founding Second Alpha, Richard was President, Managing Partner and founder of Dolphin Equity Partners, a New York-based venture firm. Between 1998 and 2010, Dolphin raised two funds and invested in nearly three dozen portfolio companies. Before Dolphin, Richard was a Managing Director in the private equity investment group at CIBC and President of CIBC's U.S. private equity subsidiaries. Richard holds a bachelor's degree from the University of Southern California and an MBA from the University of Chicago.



Pablo Zapata

Director of Private Equity Division, Tresalia Capital (Austin)

Pablo Zapata is a Director at Tresalia Capital's Private Equity Division, focusing on growth-stage minority investments in the consumer sector in the US, specifically in CPG and branded products. Tresalia Capital is a leading family office with investments and transactional experience throughout Latin America, Europe, and the U.S. As a founding family of Cerveceria Modelo (Modelo and Corona Beer), Tresalia has extensive experience in consumer products and deep business relationships throughout the US and Latin America. Tresalia supports founders and management teams in executing a shared vision of growth by pairing financial strength with strategic assistance. Tresalia Capital's portfolio includes AB-InBev, Tory Burch, Kio Networks, Casper, Multiplan, Kraft-Heinz, Aliat, and Medistik as well as early-stage investments like Kavak, Kovi, Editas, Minu, Miroculus, and GAIA amongst others. Mr. Zapata received his MBA from Stanford Graduate School of Business. He graduated from Southern Methodist University with a BBA in Finance and Economics. He is a passionate diver, wildlife photographer, and an aspiring kitesurfer.



Jamil McNeal

Director of Investments, True North Advisors (Dallas)

Jamil is the Director of Investments – Credit and Private Markets at True North Advisors, where he is helping to build, execute, and manage the firm’s Western Alternative Strategies (WAS) investment offerings which is an inhouse series of private and alternative focused vehicles. He has worked in the investment industry for over 17 years and over that time has covered Private Debt, Private Equity, Private Real Assets, and Alternative Credit among other roles. Prior to his time at True North, Jamil was a private markets allocator for a Dallas based corporation where he developed a passion for institutional quality private investing. He has brought this passion to True North where he focuses on providing expanded access to quality private investments and alternatives in the wealth management and RIA space.



Charles Phippen

Principal, Private Equity Investments, GCM Grosvenor (New York)

Mr. Phippen focuses on private investments across multiple asset classes and is involved with deal sourcing, conducting due diligence and managing institutional client relationships. He is presently a member of the advisory boards of several private equity limited partnerships. Prior to joining GCM Grosvenor, Mr. Phippen worked on the corporate acquisitions team for Indeed, where he helped lead sourcing, due diligence and the execution of mergers and acquisitions across the software sector. Prior to this, he worked as an associate at Pivot Investment Partners, and previously helped execute mergers and acquisitions on behalf of CIT Group. Mr. Phippen began his career in the Investment Banking Analyst Program at JP Morgan in New York. Mr. Phippen also received both his Bachelor of Arts in Economics as well as his Master of Business Administration from Columbia University, where he was a Robert Toigo Foundation Fellow, recipient of the William J. Heffernan Memorial Award, and subsequently named a Fellow in the Economic Club of New York.



John Carrick

Co-Founder And Managing Principal, Integrated Capital Management (Los Angeles)

John Carrick is Co-Founder and Managing Principal of Integrated Capital Management (ICM). Mr. Carrick’s extensive experience as a real estate attorney, investment banker and principal is reflected in the execution of more than \$75 billion in real estate transactions during and throughout his accomplished career. He brings invaluable insight and a powerful macroscopic perspective to ICM, with the ability to handle complex legal and business-related matters, debt and equity financing needs, and the analysis and evaluation of commercial real estate investment opportunities. Immediately prior to forming ICM, Mr. Carrick was Senior Managing Director at Newmark Grubb Knight Frank (NGKF), where he advised clients with respect to both equity and debt capital formation on a project, portfolio or entity basis. He also held executive positions at Anderson Global Corporate Finance, Savills Studley and Cohen Financial. Previously, he was part of the investment banking practice at Nomura Asset Capital where he focused on debt underwriting, origination, securitization and asset management. Mr. Carrick started his professional career as a structured finance attorney in the private sector and as counsel for the Resolution Trust Corporation (RTC). Mr. Carrick received a BA from Bucknell University and a JD from The Columbus School of Law at Catholic University of America. After practicing law for five years, he continued his education at UC Berkeley and earned an MBA at the Haas Graduate School of Business where he was awarded the prestigious Marshall Bennett Real Estate Fellowship.



Mike Bologna

CIO, NovaQuest Capital Management (North Carolina)

Mike Bologna, CIO at NovaQuest Capital Management, has over 20 years of experience in the biomedical industry across pharmaceuticals and health care investing. He is a member of the investment committees of the NovaQuest Pharma Opportunities Funds and NovaQuest Animal Health Fund I. As CIO, he is responsible for the day-to-day investment activities of the firm including oversight of the investment team, Due Diligence and Alliance Management. He joined the NovaQuest business unit at IQVIA (formerly Quintiles) in 2007 and served as a transaction and due diligence leader. Mike had material involvement in the structuring, negotiation, and management of a wide variety of product-based and company investments, prior to the formation of NovaQuest Capital Management in 2010. Prior to joining NovaQuest, Mike served in a variety of roles with EMD Pharmaceuticals (U.S. subsidiary of Merck KGaA) and Eli Lilly and Company. He worked in corporate development, market research, and commercial new product planning. Mike earned a BS in Nursing from University of Michigan and MBA from Fuqua School of Business at Duke University.



Brian Bova

Co-Chief Investment Officer, Inscription Capital (Houston)

Brian is Co-Chief Investment Officer and formerly one of a select group that founded UBS' Private Wealth Management national practice as well as UBS' alternative investment consultant for the region, serves as Inscription Capital's Chief Investment Officer. Mr. Bova, with a B.A. in economics from the University of Washington, and both a J.D. and M.B.A. from the University of Arizona, is a CFA Charter holder, CFP® Professional, and Chartered Alternative Investment Analyst. Mr. Bova has been recognized for his work as a private wealth adviser in numerous financial publications, such as Barron's, On Wall Street, and the Houston Business Journal. Prior to founding Inscription, Mr. Bova sat on the Private Wealth Management Leadership Committee and the Alternative Investment Advisory Council for UBS Financial Services. In addition to his work in the investment community, Mr. Bova serves on the Advisory Board of Houston's KIPP Academy.



Daniel J. Lee

Partner, Chief Revenue Officer, Wealth Advisor, Certuity (San Francisco & Los Angeles)

Mr. Daniel J. Lee is a Partner, Chief Revenue Officer and Wealth Advisor with Certuity. Prior to joining Certuity, Mr. Lee spent 10 years at First Republic Bank, most recently as a Senior Managing Director and Wealth Advisor, where he grew new client wealth management assets by approximately \$7 Billion and worked directly with sophisticated high- and ultra-high-net-worth families. He also served on First Republic Bank's Leadership Committee and as Regional Wealth Advisor Manager for the Pacific Northwest. Prior to First Republic Bank, Mr. Lee was a Private Client Advisor at U.S. Trust, where he provided counsel on investment strategy, asset allocation, estate planning, and multi-generational wealth transfer planning to high-net-worth individuals, families, foundations, and endowments. Prior to U.S. Trust, he served as a Financial Advisor in Merrill Lynch's Global Wealth Management division in Los Angeles, and worked in the private equity and real estate divisions of The Jones Group, a multi-family office. Mr. Lee graduated with honors and as a member of the dean's list from the University of Arizona's Eller College of Business with a Bachelor's Degree in Business and Public Administration. In addition, he received a minor in International Business from Lorenzo de' Medici in Florence, Italy.



Matthew Saverin

Director, Real Return, UTIMCO (Austin)

Matt serves as Director of Real Return for UTIMCO, where he is responsible for real asset investments across real estate, natural resources, and infrastructure on a global basis. Matt also serves as Head of External Partnerships for UTIMCO Scholars, a program focused on providing access, education, and opportunity across the investment management industry for pell grant eligible and/or first generation college students across the UT and A&M systems. Prior to joining UTIMCO, Matt worked at Bayshore Global Management where he invested across real estate, infrastructure, hedge funds, and private equity. Matt began his career at Goldman Sachs as an energy research analyst. He received an MBA and Interdisciplinary Graduate Certificate in Real Estate from the University of California Berkeley Haas School of Business and completed his undergraduate studies at the University of Colorado Boulder.



Kevin Manuel Pohler

Managing Director, Pearl Energy Investments (Dallas)

Kevin Manuel Pohler is a Managing Director of Pearl Energy Investments, concentrating on Pearl's efforts in sourcing, investment analysis and execution and serving as a board member of various portfolio companies. He joined Pearl in 2015 and is a member of the firm's Investment Committee. Prior to joining Pearl, Kevin was an Analyst with Goldman, Sachs & Co. in the Global Natural Resources Investment Banking Group in New York, where he worked on M&A transactions and capital markets financings, with a focus on the oil & gas, power, mining and chemicals sectors. Kevin holds a B.A. in Economics with honors from Harvard College and an M.B.A. from the Stanford Graduate School of Business.



William Costigan

Managing Director, Guggenheim Partners (Santa Monica)

Mr. Costigan is a senior member of Guggenheim Investments with deep technical expertise in fixed-income and alternative credit mandates including private debt and structured credit. He is a frequent speaker at national investment conferences and has been cited in various industry publications. With nearly two decades of experience, Mr. Costigan spent five years as an Investment Banker in New York and Seattle with KeyBank focusing on the origination, structuring and syndication of Leveraged Buyouts. He then developed strategic investment solutions at the Vanguard Investment Group prior to joining Guggenheim. Mr. Costigan earned an M.B.A. from Loyola Marymount University and a B.S. in Economics from John Carroll University.



Zac McCarroll

Managing Director, Apogem Capital (Austin)

Zac McCarroll oversees all aspects of Apogem Capital real assets investment capability including investment management, client relationships and marketing. Zac is also an Investment Committee member. Prior to joining Apogem, Zac was at University of Texas Investment Management Company (UTIMCO) where he was instrumental in building and managing the endowment's \$4 billion real assets portfolio. Prior to UTIMCO, Zac held positions at Q Investments (a \$2 billion hedge fund) and Enron Corp., where he gained diverse real assets investing experience working in mergers and acquisitions, business development, liquid market trading, and private equity investing. Zac received a B.B.A. in Finance from University of Texas at Austin and an M.B.A. from the Wharton School of the University of Pennsylvania.



Yvonne Huang

Portfolio Manager, Texas Municipal Retirement System (Austin)

Yvonne is a Portfolio Manager at Texas Municipal Retirement System ("TMRS"), a \$35 billion public pension plan based in Austin, TX. She is responsible for investment sourcing, manager due diligence, and portfolio management efforts across different private market asset classes, primarily focusing on infrastructure, natural resources, real estate, and asset-backed private equity and private credit strategies. Prior to joining TMRS, she worked at investment functions for multiple leading Canadian pensions and financial institutions. Yvonne earned a BS in Mathematics from the University of Waterloo with a double concentration in Statistics and Actuarial Science. She is a CFA Charter holder, a Chartered Alternative Investment Analyst, and a candidate for the Venture Capital and Private Equity program at Columbia Business School.



Mark McFadden

Co-Managing Partner, CCMP Growth (New York)

Mark McFadden is Co-Managing Partner of CCMP Growth and a member of CCMP Growth's Investment Committee. He is also Co-Managing Partner and an Investment Committee member of CCMP Capital. Mark has spent his entire two decade private equity career focused on high growth industrial technology and services businesses, and currently heads CCMP's investment activities in the industrial sector. Prior to joining CCMP Capital's predecessor JPMorgan Partners in 2002, he was an investment banking analyst at CSFB and Bowles Hollowell Conner. Mark currently serves on the board of directors of Omnia Exterior Solutions and BGIS and has been involved in CCMP Capital's prior investments in Hayward, Generac, Ecovyst/Eco Services and Milacron. He also serves as Board President of The Quad Preparatory School.

Derek Spence

Founding Partner, Frontline Healthcare Partners (Boston)



Mr. Spence is a founding partner and Investment Committee member at Frontline Healthcare Partners (FHP). He is responsible for overseeing all key aspects of the investment process, including sourcing, structuring, and negotiating transactions, as well as portfolio company oversight and growth strategies. He brings more than 25 years of private equity investing experience to FHP, totaling more than \$280M of direct, lower-middle market investments. Mr. Spence currently serves on the boards of JoyBridge Kids, LivWell Infusions, and PorchLight Health. Prior to FHP, he was a Managing Principal at Striker Partners (Striker). Striker, based in suburban Philadelphia and a member of The Graham Group, is a private, family-based investment firm formed to make majority equity investments in small, profitable, and growing businesses. Mr. Spence is a graduate of Bowdoin College (BA) and the Wharton School at the University of Pennsylvania (MBA), where he graduated with degrees in Health Care Management and Finance.

Jeff Curtis

Managing Director, Private Capital, Agility Outsourced CIO (Austin)



Jeff Curtis is a Managing Director at Agility and is a member of the Private Capital Team, where he is responsible for managing clients' private investment portfolios. In addition to portfolio management, Jeff is involved in managing client relationships, sourcing investments, managing relationships with General Partners, and is a participating member on Agility's Investment Committee. Prior to joining Agility, Jeff was an Analyst in the Energy Group at UBS Investment Bank, where he worked on various transactions including corporate mergers and acquisitions, asset divestitures, debt restructuring, and strategic advisory assignments. Jeff is a CFA charterholder, and represents PWP on multiple Limited Partner Advisory Committees. Jeff received a BA in the Business Honors Program and an MPA, both from the University of Texas at Austin. Outside the office, Jeff stays active by playing sports and loves to spend time with his wife and their two kids, Cooper and Charley.

Karen S. O'Mahony

Managing Partner, PEAL Capital Partners (London)



Karen is the Founder and Managing Partner of PEAL Capital Partners ("PEAL"). PEAL is a lower midcap private equity firm that acquires companies specialising in medical training and treatments relating to longevity and hormones. Prior to establishing PEAL, Karen was Deputy CIO and Executive Director of Misland Capital Ltd, where she managed an \$800m private equity portfolio across multiple sectors and jurisdictions. Karen has played pivotal roles on the Boards of Derma Med Ltd, PCPF UK Ltd, Misland Capital Ltd and Tri Star Resources PLC (where she stepped in as Acting CEO/CFO to restructure the Group). She has a B.B.S in Finance from Trinity College Dublin and a Masters in Quantitative Finance from University College Dublin.



Jon Hoffman

Managing Director, Head of Investor Relations, Rhône Group (New York)

Mr. Hoffman joined Rhône in 2014 and became a Managing Director in 2018. He oversees Rhône's investor relationships, marketing and public relations activities, as well as global fundraising efforts. Prior to joining Rhône, Mr. Hoffman was a Partner and Global Head of Distribution for Sixpoint Partners, a boutique investment bank, where he supported Rhône, as well as other private equity firms, in fundraising activities. Previously, he worked in Investment Banking and Institutional Sales at Bank of America Merrill Lynch and Citigroup. Mr. Hoffman received an M.B.A. from Columbia Business School and a B.A. in Economics from the University of Rochester.



Jesse Rodriguez

Vice President, Upwelling Capital Group (Sacramento)

Jesse is Vice President with Upwelling Capital Group where he is responsible for sourcing and executing secondary transactions. Prior to joining Upwelling, Jesse worked in the California State Senate, where he was involved in several policy and communication initiatives across the legislature. He also served as Co-Chair for the California Latino Capitol Association Foundation. He received his undergraduate degree in Economics from the University of California, Davis, and an MBA from the University of California, Davis Graduate School of Management. Jesse holds Series 7 and 66 FINRA securities licenses and is a registered representative of Bridge Capital Associates.



Boriana Karastoyanova

Managing Director, Neuberger Berman (New York)

Boriana Karastoyanova is a Managing Director of Neuberger Berman and a member of the Secondary Private Equity Team. Prior to joining Neuberger Berman in 2019, Mrs. Karastoyanova was with Blackstone's Strategic Partners Fund Solutions where she focused on originating, evaluating, structuring and negotiating secondary private equity transactions, co-investments and primary commitments. She previously was with Strategic Partners while it was in the Asset Management division of Credit Suisse. From 2005 to 2008, she led Strategic Partners' European operations out of London. Mrs. Karastoyanova began her career in Investment Banking at Citigroup. She holds a BA from Middlebury College.



Garheng Kong

Managing Partner, Founder, HealthQuest Capital (Austin)

Garheng is the Managing Partner and Founder of HealthQuest Capital, a private asset firm that currently provides growth capital to transformative companies that are improving value in the healthcare system. Prior to founding HealthQuest, Garheng was a partner at Intersouth Partners and Sofinnova Investments, and has also spent time at GlaxoSmithKline and McKinsey, and as a CEO of two healthcare companies. Garheng also serves as Lead Director of LabCorp (LH) and on the boards of Xeris Biopharma Holdings (XERS), Be The Match, Duke University Medical Center, Dell Children's Foundation, UT President's Commercial Advisory Board, and the Austin Healthcare Council Board. He is an Aspen Institute Health Innovators Fellow, Kauffman Fellows Mentor, and member of YPO. Garheng received undergraduate degrees in both Chemical Engineering and Biological Sciences from Stanford, while on an athletic scholarship, and earned MD, PhD and MBA degrees from Duke University.



Christopher Schelling

Director of Private Investments, Caprock (Austin)

In my career, I have met with roughly 4,000 investment firms across all alternative investments and private markets and managed commitments totaling nearly \$7 billion. I've led due diligence on over 100 funds including hedge funds, real assets, private credit, and private equity. I believe my unique combination of expertise in private markets provides a valuable perspective for the families we serve. Institutional investing is rewarding because the work often accomplishes positive social objectives, but personal interaction with the beneficiaries and appreciation for a job well done is often lacking. After investing in several PE funds that owned wealth management platforms, I realized I wanted to work in an independent firm that aligned with the best interests of its clients. It quickly became apparent to me that Caprock was a great fit for me from both a firm culture and investment philosophy perspective. I really appreciate our commitment to being uncompromisingly focused on clients.



Terry Darling

Managing Director, CrossBay Capital (Greenwich)

Terry Darling has over 30 years of experience as a private capital fundraiser, alternative investments allocator, independent sponsor and equity research analyst. At CrossBay Capital Partners — a boutique placement agent for private equity, credit and real asset funds based in New Canaan, CT — Terry works with both GP's and LP's. Prior to CrossBay, Mr. Darling worked on the alternatives investment portfolio at White Mountains Insurance, spent 3 years as an independent sponsor, and was a Managing Director and sector head of the Energy and Industrials Equity Research teams at Goldman Sachs. Mr. Darling is past Chairman of the Endowment Commission at Christ Episcopal Church in Greenwich, CT and is co-Head of the New York Regional Board of the University of Virginia College Foundation.

PRE-EVENT NETWORKING COCKTAIL

Wednesday, October 18th

5:00pm – 8:00pm CT

Location: Codependent Cocktails + Coffee

301 West Ave STE 110, Austin, TX 78701

Sponsored By:



AGENDA OUTLINE

7:30 AM CT

Registration & Breakfast Networking

Sponsored by:



8:30 AM CT

Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

8:30 AM CT

Macroeconomic Trends and the Impacts on Global Investment Opportunities

Presenter:

Elizabeth Burton, Managing Director and Client Investment Strategist, Goldman Sachs

9:00 AM CT

LP Perspectives on the Private Markets

Leading Institutional Investors discuss their current investment theses across the private markets. How have their strategies changed given geopolitical conflicts, inflation and rising interest rates?

Moderator:

Terry Darling, Managing Director, CrossBay Capital

Keynote Speakers:

Charles Phippen, Principal, Private Equity Investments, GCM Grosvenor

Yvonne Huang, Portfolio Manager, Texas Municipal Retirement System

Mike Krems, Partner, Private Equity Portfolio Strategies, Aksia

10:00 AM CT

AM Networking Break

Sponsored by:



AGENDA OUTLINE

THURSDAY
October 19th

10:30 AM CT

Private Credit: The Golden Era

Investors and Managers discuss their investment activity in Private credit. How long will this window of opportunity last?

Moderator:

William Costigan, Managing Director, Guggenheim Partners

Panelists:

Brett A. Hickey, Founder & CEO, Star Mountain Capital

Coleman Andrews, CEO, RMWC, Co-founder, Bain Capital

Patrick Jordan, Managing Partner, NovaQuestCapital Management

Jamil McNeal, Director of Investments, True North Advisors

11:30 AM CT

Secondaries Texas Style: Is Bigger Better?

Moderator:

Jesse Rodriguez, Vice President, Upwelling Capital Group

Panelists:

Eric Yu Chang, Co-Founder & Partner, Melange Capital Partners

Richard Brekka, Managing Partner and co-founder, Second Alpha Partners

Boriana Karastoyanova, Managing Director, Neuberger Berman

12:00 PM CT

Sector Spotlight: Healthcare

Leading private equity groups discuss their healthcare focused investment programs and how the healthcare industry offers attractive investment opportunities that all LPs should consider.

Moderator:

Mike Bologna, CIO, NovaQuest Capital Management

Panelists:

Garheng Kong, Managing Partner, Founder, HealthQuest Capital

Derek Spence, Founding Partner, Frontline Healthcare Partners

Karen O'Mahony, Managing Partner, PEAL Capital Group



AGENDA OUTLINE

THURSDAY
October 19th

12:30 PM CT

Networking Luncheon

Sponsored by: **NOVAQUEST**
CAPITAL MANAGEMENT

1:30 PM CT

Keynote Fireside Chat: Investing For the Benefit of Texas Public Schools

In this session Commissioner Dawn Buckingham and Britt Harris discuss the agency's mission to primarily serve the schoolchildren, veterans, and the environment of Texas. How is the Texas General Land Office maximizing state revenue through innovative administration and through prudent stewardship of state lands and natural resources? What is the Texas Permanent School Fund? What is its purpose, how is it structured and how does it match up with TRS, ERS, and UTIMCO? What does it mean to be a "Special Purpose Government Corporation"? Our Keynote Speakers will also discuss current global market conditions, energy transition, China and the impacts of Artificial Intelligence.

Keynote Speakers:

Dawn Buckingham, Commissioner, **The Texas General Land Office**

Britt Harris, Acting CEO, **Texas Permanent School Fund Corporation**

2:00 PM CT

Private Equity: From Middle Market to Buyout

On this session leading institutional investors and fund managers talk about their buyout and middle market strategies in the current environment. What do investors need to see to get comfortable with a deal right now? At the portfolio level, how has the market environment impacted allocation?

Moderator:

Brian Teefey, Partner, Transaction Advisory Services, **Weaver**

Panelists:

Matt Denbleyker, Co-Chief Investment Officer, OCIO Solutions, **Commerce Street Investment Management**

Daniel Krikorian, Principal, **StepStone Group**

Mark McFadden, Co-Managing Partner, **CCMP Growth**

Jon Hoffman, Managing Director, Head of Investor Relations, **Rhône Group**

3:00 PM CT

Keynote Panel : Making Sense of a Contradictory Market

Interviewer

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

Keynote Speakers:

Tom Tull, Former CIO, **Employees Retirement System of Texas**

Jeff Curtis, Managing Director, Private Capital, **Agility Outsourced CIO**

THE PRIVATE MARKETS TEXAS MEETING



AGENDA OUTLINE

3:30 PM CT

PM Networking Break

Sponsored by:



4:00 PM CT

The State of Real Assets

How are investors thinking about investing in real assets in this current high interest rate environment?

Moderator:

John Carrick, Co-Founder And Managing Principal, **Integrated Capital Management**

Panelists:

Greg Friedman, Managing Director, CEO, **Peachtree**

Zac McCarroll, Managing Director, **Apogem Capital**

Matthew Saverin, Director, Real Return, **UTIMCO**

Kevin Manuel Pohler, Managing Director, **Pearl Energy Investments**

5:00 PM CT

TEX-MEX Family Office Perspectives

Texas and Mexico based Family Offices discuss their current appetite for fund, direct & co-investment across various sectors in the private markets. How do they view current valuations across sectors. How do they add value in the investment process and how do they go about manager and deal selection.

Moderator:

Daniel J. Lee, Partner, Chief Revenue Officer, Wealth Advisor, **Certuity**

Panelists:

Christopher Schelling, Director of Private Investments, **Caprock**

Rogelio Prieto, PE Manager, **Arzentia Capital**

Pablo Zapata, Director of Private Equity Division, **Tresalia Capital**

Brian Bova, Co-Chief Investment Officer, **Inscription Capital**

6:00 PM CT

Cocktail Reception

Sponsored by:





PARTICIPATION OPTIONS



PARTICIPATION OPTIONS

COMPLIMENTARY

We only invite Limited Partners at no cost. We qualify LPs as Public Pensions, Corporate Pensions, Pension Consultants/OCIOs, Superannuation Funds, Foundations, Sovereign Wealth Funds, Endowments, Hospital Systems, 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 invited as an LP and are caught pitching a fund or deal, you will be banned from the Carmo platform. There is nothing wrong with raising capital, just be honest with us and your intentions. If you're not a true LP, you must pay to play.

STANDARD PASS

- **Pass**

- 1 pass to full conference, event cocktail hours and networking sessions.
- *Attendee list Not included*

~~Early Bird: \$1,500 USD~~ **Ends August 18th**

~~Pre-Registration: \$2,000 USD~~ **Ends September 15th**

Standard: \$2,500 USD



PARTICIPATION OPTIONS

ATTENDEE LIST SPONSORSHIP

- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
 - Pre-event email intros/ Carmo meeting facilitation *NOT* included.
- **Networking Break or Stand (Optional)**
 - Branding and announcement to all attendees during networking break
 - Ability to upgrade food and beverages for networking
 - Sponsor may choose to have 10' x10' space in networking area to distribute marketing material and present information regarding company.
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.

\$10,000 USD

CAP-INTRO SPONSORSHIP

- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$12,500 USD

PARTICIPATION OPTIONS

SPEAKING SPONSORSHIP

- **Speaking Position**
 - Client may choose to speak, moderate or present on panel of choice at event of choice
- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$15,000 USD

PRESENTATION SPONSORSHIP

- **Presentation**
 - Stand-Alone 20 Minute presentation at time of choice during the event
- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$25,000 USD

EXCLUSIVE TITLE SPONSORSHIP

- **Priority Brand Placement & Material Distribution**

- Sponsor's Corporate logo to be placed above and in a larger format on the conference brochure, agenda, website, banners and branded event advertisements
- Any research or marketing materials will be made available and/or distributed to all conference attendees.
- Sponsor to include a full-page advertisement to be placed on back cover of conference brochure.
- Sponsor logo and link to sponsor site to be included on a bi-weekly newsletter which will update all confirmed and prospective attendees of event progress.
- Sponsor to have all attendee lanyards with company logo.

- **Exclusivity**

- First access to conference attendee list 3 weeks prior to the event.
- Carmo will provide one on one introductions via email to all prospective clients of choice (funds/investors).
- On-site direction and introduction facilitation to prospective clients
- Dedicated private sponsor room for 1 on 1 meetings

- **Exclusive Sponsor Cocktail/Dinner**

- Carmo to help facilitate private cocktail party/dinner with selected investors night before the event

- **Speaking/ Moderating Positions**

- 2 Moderating/speaking or presentation positions on panel of choice. (first come first serve basis)

- **Company & Speaker Profiling**

- Company description to be published online and in print (150 words max)
- Speaker bio to be published online and in print (150 words max)

- **Conference passes**

- Up to 10 attendee passes for sponsor employee executives

\$50,000 USD



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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