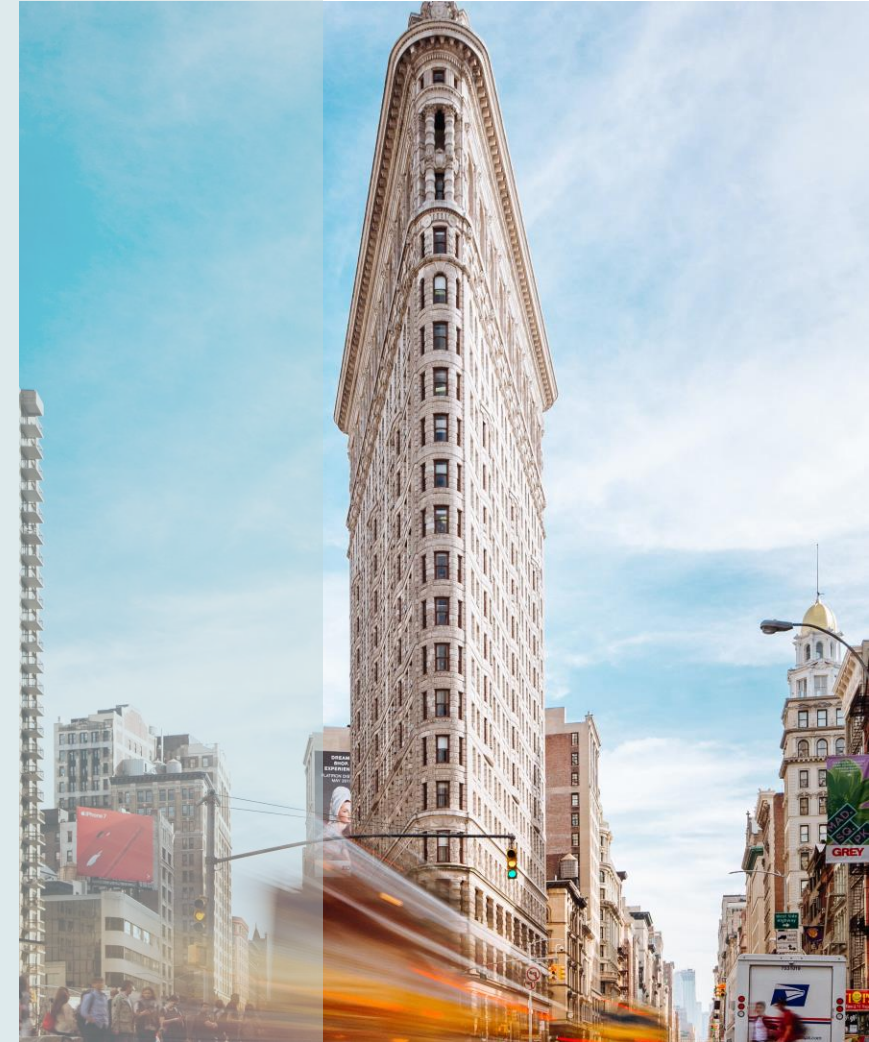




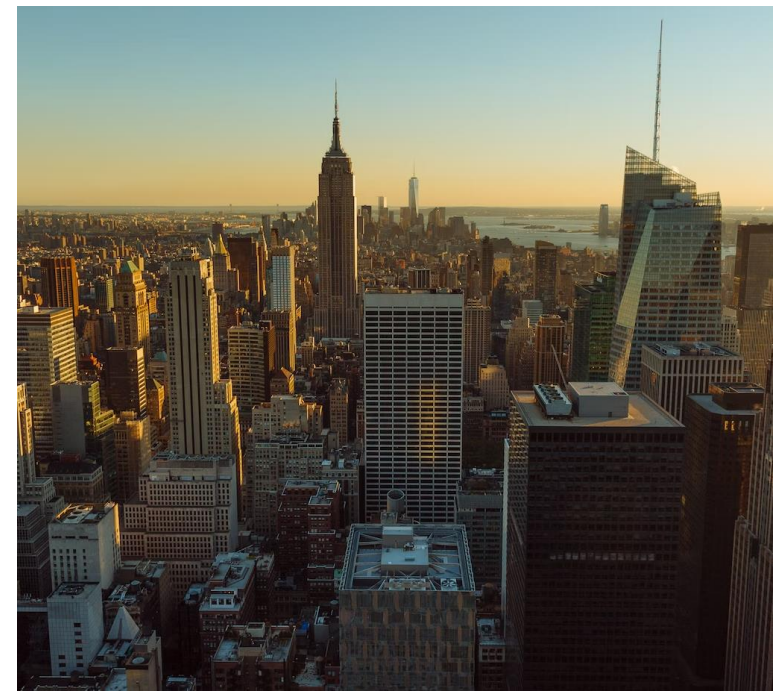
# THE US INSTITUTIONAL REAL ESTATE MEETING EAST

Metropolitan Club, New York, NY  
September 6th & 7th, 2023

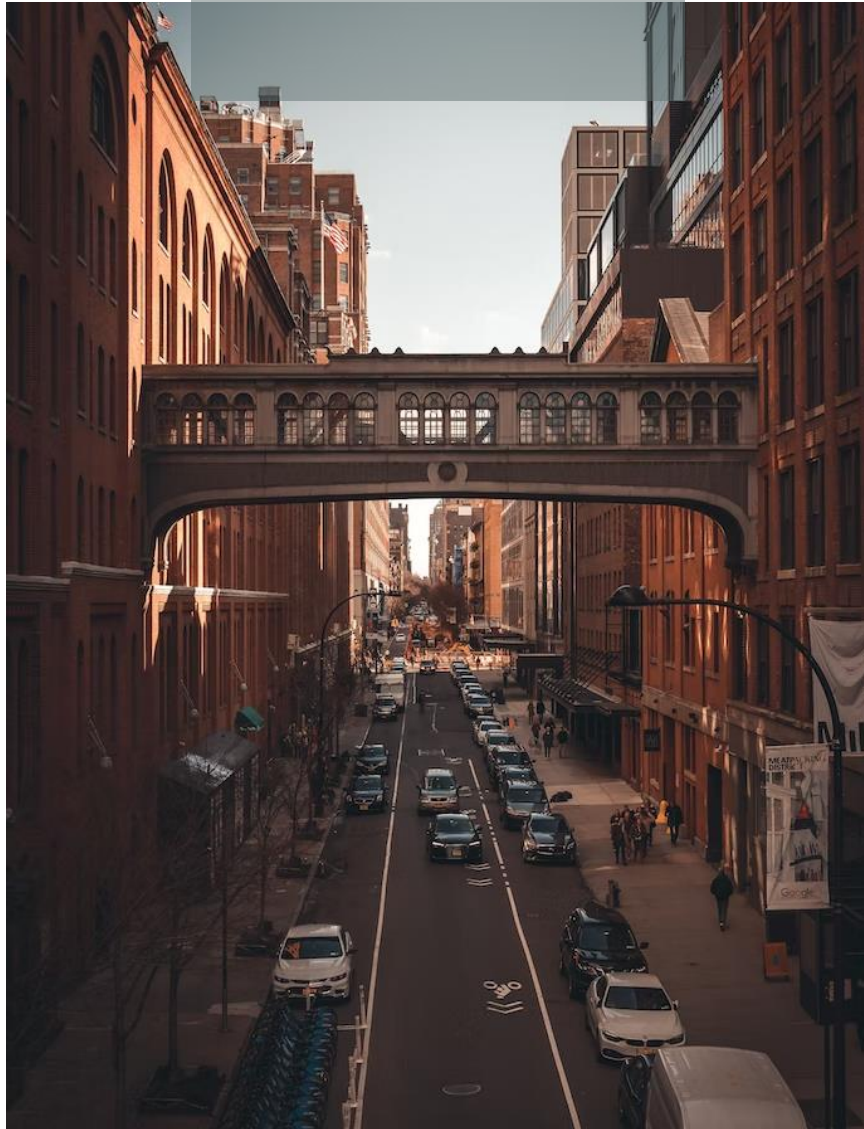


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# THE US INSTITUTIONAL REAL ESTATE MEETING EAST

METROPOLITAN CLUB, NEW YORK, NY  
SEPTEMBER 6TH & 7TH, 2023

Dear Colleague,

It is with great pleasure that I invite you to the 2<sup>nd</sup> Annual US Institutional Real Estate Meeting East. The aim of this Conference is to introduce direct and indirect investment opportunities to limited partners that are actively looking to diversify their capital across all real estate related asset classes. Our conference brings together the most important real estate investment vehicles, institutional allocators and private wealth investors that are allocating to this space. Over 250 of the leading US based PERE Funds, institutional investors and other real estate and finance professionals will come together to learn and discuss investment opportunities, allocations and the performance of all real estate related asset classes.

We look forward to hosting you in New York City!

Best,

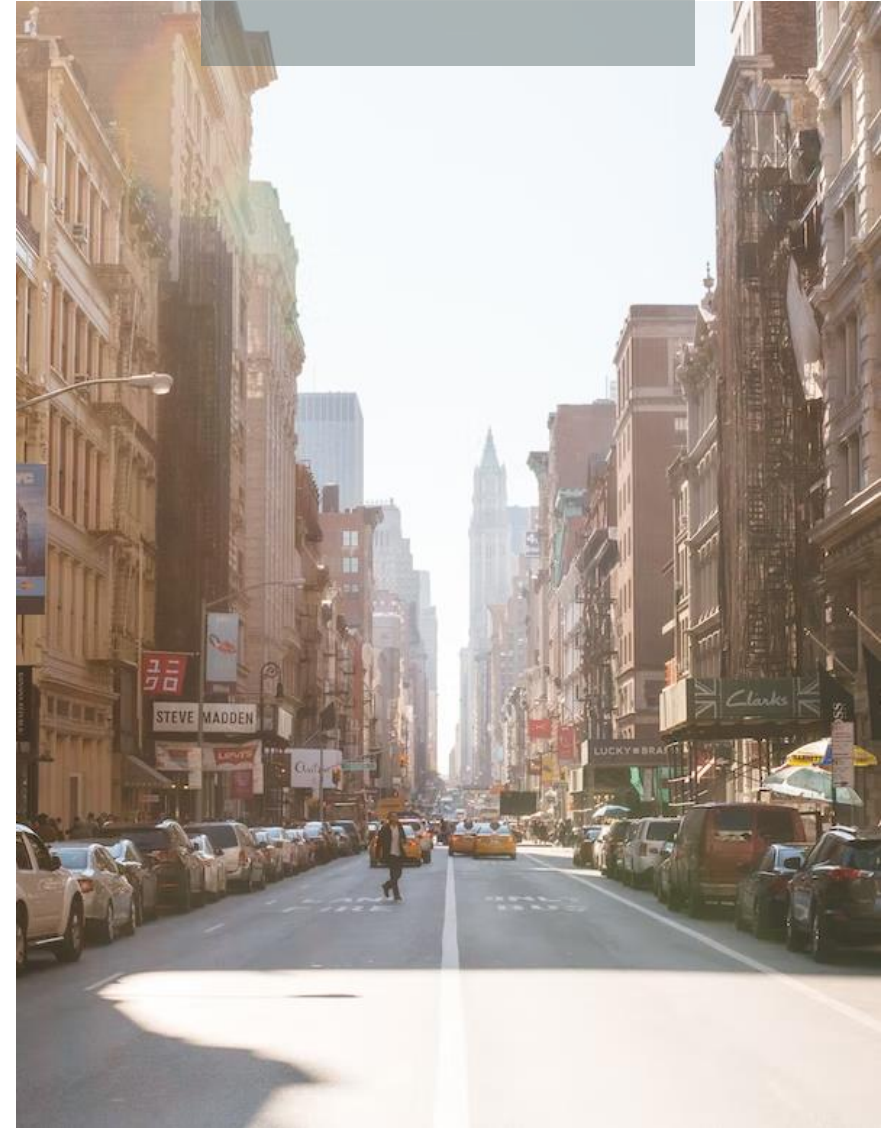
Roy Carmo Salsinha  
**President, CEO**  
Carmo Companies



# BY THE NUMBERS

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- \$5+ Trillion AUM in attendance
- 250+ Total participants
- 125+ Institutional & Private Wealth Investors
- 125+ Real Estate Investment Firms/ Funds
- 5 Industry Exclusive Panel Sessions
- 5 Hours of Networking/Speed Dating
- 1 Full day Conference
- 1 Pre-Event Networking Cocktail





# IN ATTENDANCE

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## C-Level Executives

- Corporate Pension Funds
- Endowments
- Foundations
- Real Estate Investment 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
- Real Estate Operators
- RIAs
- Real Estate Developers





# PREVIOUS SPONSORS



# INSTITUTIONAL PARTNERS





# 2023 SPONSORS



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.



BentallGreenOak is a leading, global real estate investment management advisor and a globally-recognized provider of real estate services. BentallGreenOak serves the interests of more than 750 institutional clients with expertise in the asset management of office, retail, industrial and multi-residential property across the globe. BentallGreenOak has offices in 24 cities across twelve countries with deep, local knowledge, experience, and extensive networks in the regions where we invest and manage real estate assets on behalf of our clients. BentallGreenOak is a part of SLC Management, which is the institutional alternatives and traditional asset management business of Sun Life.



Clifford Chance is one of the world's pre-eminent law firms, with significant depth and range of resources across 31 offices in 21 countries, enabling us to remain at the forefront of legal and commercial developments worldwide. Our Funds & Investment Management practice – ranked Band 1 by Chambers Global – is unique in offering teams in the Americas, Europe, Asia-Pacific and the Middle East. We advise clients throughout the full fund life cycle, including fund establishment, structuring and marketing, ongoing operational, regulatory and tax issues, and fund restructurings and secondary transactions. Our clients range in size from the world's leading asset management companies with a five continent footprint to start up or spin off funds, and we also represent investors in more than 500 private fund investments every year.



Cobra Carmo Group is a vertically integrated, real estate development company delivering institutional quality, purpose-built residential rental communities within the four major metropolitan areas of Texas. Born in Mexico, Raised in Texas, Cobra Carmo is a joint venture between Mexico City based Cobra Development and New York based Carmo Companies. Together, the partners have developed and invested in over 5 million square feet of commercial and residential projects across North America.





# 2023 SPONSORS



DXD Capital is a commercial real estate private equity firm that uses proprietary technology in the self storage sector to select, acquire, and develop opportunities expected to outperform all competition. By using data to drive decisions and iterating on the technology at the core of its differentiation, the Company is creating efficiencies at a scale that the industry has not seen before. The first \$53M fund has a fully identified pipeline and three projects under construction and is currently raising its second fund. DXD Capital's best-in-class team has more than 150 years of combined real estate and construction experience, over 90 of them specializing on self storage specifically. Through commitment to excellence, a wide network of relationships with national reach, and proprietary technology, DXD expects to deliver the best returns in the sector to its investors.



JADE Financial partners is a real estate investment firm specializing in preferred equity & mezzanine debt strategies. Since 2007, the JADE team has acquired more than \$2 billion of assets comprised of over 35,000 multifamily units and 1.5 million square feet of commercial space, & has originated & arranged over \$10 billion in commercial debt. With over 75 years of combined experience in the real estate industry, the JADE team has a proven track record of successfully investing in undervalued assets and debt secured by commercial real estate. JADE's strategy will concentrate on opportunities in which preferred equity and mezzanine financing will provide the existing common equity with more flexibility to withstand an elevated interest rate environment, while lowering the weighted cost of debt



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.



Magellan Value Partners (MVP) is a real estate development and investment firm based in Los Angeles, California. The firm was founded in 2016 by long-term real estate veterans who have known and worked with each other for over two decades and successfully acquired, developed, built, and managed over 20 million SF of assets throughout their collective careers. MVP specializes in acquiring value added industrial and self storage assets, or land for development into industrial or self storage properties. Our core focus is acquiring and investing in properties with the potential to add value. With a meticulous eye for site planning and entitlements, and building aesthetics, Magellan Value Partners takes a hands-on approach to their projects. By optimizing operational efficiency and executing value-enhancing initiatives, MVP strives to deliver institutional-quality assets to customers and investors. Our team's years of experience and successful track record, accompanied by loyal friendships, collaboration, and integrity have created a dynamic and authentic firm.



# 2023 SPONSORS



March Capital Management is a private equity real estate fund and a development company that invests in underutilized residential real estate assets and maximizes their value. March Capital Management focuses primarily on the West Coast urban markets. Investments range from small residential buildings to large, ground-up, infill projects. The management team is laser focused on product fit for a particular location with a keen eye on design. To accomplish that goal, March Capital Management has a hands-on approach across all aspects of the development cycle, from due diligence, acquisition, architectural design, entitlement, permitting, contract bidding, construction, and property management all the way to marketing and disposition of the end product. March Capital Management has an enviable track record across three funds.



MarketSpace Capital is a Private Equity Real Estate Firm headquartered in Houston, Texas that focuses on acquisitions and ground up developments of commercial real estate properties throughout the United States. Through our relationships, expertise and disciplined, data-driven analysis, our veteran staff has the capability and experience required to maximize value creation through a comprehensive and programmatic investment philosophy and asset management approach. In addition to producing consistent returns on its investments, MarketSpace Capital seeks to create a positive, economic impact and long-term value for its investors, its properties and the communities in which we serve. Through the experience of a myriad of veteran real estate professionals and its team of advisors and consultants, MSC and its Co-Developers can source, analyze and execute on a large universe of investment opportunities. These investments have historically ranged from a core competency of value creation by taking commercial and raw land, and providing a path forward through entitlement, development and construction, as well as a value-add investment strategy by seeking out those assets where the company's speed, creative structure and nimble resources can capitalize on distressed or opportunistic situations.



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](http://www.peachtreegroup.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



RockStep Capital is a privately held, full-service, vertically integrated real estate investment firm that owns and manages enclosed malls, open-air shopping centers, and institutional third-party retail assets. Headquartered in Houston, Texas, the company acquires and develops underperforming assets into relevant and vital properties that benefit the communities they serve. Over the past 25 years, RockStep Capital has built or acquired over 9 million square feet of shopping centers and currently holds more than 7.5 million square feet of assets in its portfolio. The firm's investment strategy focuses on cash-flowing investments for acquisition and repositioning, with an emphasis on assets that carry minimal risk and provide reliable returns to investors. RockStep's vertical integration of services, coupled with its innovative approach to retail property repositioning and revitalization, accelerates returns for investors on projects in major and secondary markets.



Safe Harbor is a minority owned private credit manager, founded in 2005, specializing in the purchase of distressed commercial real estate debt, providing essential solutions to lenders who are unwilling or unable to workout loans. The firm's philosophy and process are inspired by 3 guiding principles: intentionality, consistency and safety. We have demonstrated success for over nearly two decades by delivering competitive, benchmark beating returns. Our strategy is recession resistant and uncorrelated to other major asset classes resulting in equity-like returns with fixed income-like risk. Our experience demonstrates that distressed commercial real estate debt offers the low volatility of real estate and the consistency of private credit: managed downside, yield premiums and upside potential. Safe Harbor provides the experience and expertise to monetize the current trillion dollar generational opportunity and asymmetrical returns offered by this high-touch asset class. We align our interest with our investment partners. Our personal capital is always invested alongside yours.



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.



Skyhaus is a vertically integrated residential developer in Mexico City. Our company focuses on high demand markets catering to the growing middle-class niche. Through our unique approach we offer investment portfolios that maximize returns for our investors taking advantage of our excellence of execution in construction and an efficient strategy to sell / rent / stabilize our product. We have 20+ years of proven experience in our market.



# 2023 SPONSORS



Westmount Realty Capital, LLC is a time-tested, privately held, Dallas-based commercial real estate company that has achieved exceptional performance, with a core team in place, for more than 35 years. Westmount is seen as an innovator and leading-edge company in the industry and is a relationship-driven trusted operating partner of numerous U.S. and foreign institutional and private capital sources. The company is active within the U.S., specializing in value add and opportunistic investments, and has navigated successfully through multiple market cycles. For additional information, contact [www.westmountrc.com](http://www.westmountrc.com).





## Jeff Krasnoff

Chief Executive Officer, Rialto Capital Management (Miami)

Jeff Krasnoff is Chief Executive Officer of Rialto Capital Management, which he formed in 2007 to capitalize on investment opportunities in the commercial real estate sector. Today, Rialto is an integrated investment and asset management platform investing and managing throughout the capital structure in real estate properties, loans and securities. In addition to investing its own capital, Rialto manages a number of investment vehicles alongside other partners, including pension funds, endowments, insurance companies, family offices, financial institutions, sovereigns, and government agencies. With over 45 years of experience in commercial and residential real estate investment, finance and management, Mr. Krasnoff has been involved in the evaluation or oversight of hundreds of billions of dollars of real estate assets around the world. Mr. Krasnoff was also a co-founder of LNR Property Corporation and was its President/CEO. LNR became the world's largest CMBS special servicer under his leadership. Prior to LNR and Lennar, Mr. Krasnoff spent ten years with KPMG, LLC (formerly Peat Marwick) in New York and Miami specializing in real estate and mergers and acquisitions. Mr. Krasnoff is a graduate of Duke University.



## Thomas B. Brown

Partner, LGT Capital Partners (New York)

Thomas Brown is a partner at LGT Capital Partners (USA) Inc., where he is a senior member of the real estate practice. He focuses on setting investment strategy and making investments globally in primary funds, secondaries and co-Investments. Prior to joining the firm, he co-founded Clerestory Capital Advisors in 2007, now part of LGT CP. Before that, Mr. Brown headed the global real estate practice of Deutsche Bank Private Wealth Management, based in London. Earlier still, he was real estate investment banker for 12 years at J.P. Morgan in London, New York and Frankfurt. He began his career with Oak Tree Capital, Inc. in New Orleans, formerly a real estate asset management firm and a subsidiary of Oak Tree Capital Savings and Loan. Mr. Brown holds a BA from the University of Mississippi. Mr. Brown currently serves as a Board Member for INREV and AFIRE. He is fluent in English and conversant in German.



## Tal Peri

Head of U.S. East Coast and Latin America, Union Investment Real Estate GmbH (New York)

Tal Peri is a senior real estate investment and finance professional with over 20 years of industry experience across markets and product types. Tal has closed more than \$5.5 billion of real estate transactions. He serves as Head of U.S. East Coast & Latam for Union Investment Real Estate in their New York office with the primary responsibility of overseeing equity investment activities in these regions. Union Investment is the largest open-ended real estate fund in Germany with a global real estate AUM of \$60 billion and a US AUM of \$7 billion. Prior to this role, Tal was an Associate Director at WestLB, New York, where he was responsible for real estate acquisition and development finance transactions.



## Dags Chen, CFA

Head of U.S. Real Estate Research & Strategy, Barings (Hartford)

Dags Chen is a member of Barings Real Estate, a global real estate platform with extensive capabilities across both debt and equity strategies. Dags is a Managing Director and Head of U.S. Real Estate Research & Strategy, responsible for driving proprietary research analysis and monitoring property and capital market fundamentals, trends and pricing across major U.S. metro areas and property sectors. In addition, he serves on the Barings Real Estate U.S. Private Equity Investment Committee and U.S. Debt Investment Committee. Earlier in his career, he spent 10+ years as a member of the Research team at former Cornerstone. Prior to rejoining the firm in 2022, he served as the Head of Real Estate Research at Ares Management and as a Vice President of Strategy & Research at Clarion Partners. Dags holds a B.A. degree in Government from Wesleyan University and an M.B.A. in Finance and Real Estate from the University of Connecticut's School of Business and is a CFA charter holder.

## Sohail Hassan

Co-Founder & Managing Partner, MarketSpace Capital (Houston)



Sohail is Co-Founder & Managing Partner at MarketSpace Capital responsible for setting the firm's strategic direction and overseeing the day-to-day management including taking a lead role in the development activities of the company. Before joining MarketSpace Capital, Sohail acquired and successfully exited several business ventures related to engineering and technology including Bovay Engineers, a Civil & MEP Engineering Design Firm originally founded in 1946. Additionally, Sohail served as Director of U.S. Operations for the Apex Group of Companies, a global consortium of companies with a focus on providing services to both the private and public sector in business consulting, insurance & financial services, manufacturing, vendor management, medical equipment supply & logistics. Throughout his career, Sohail has a proven track record in disrupting various industries using data and technology and is now applying these same principles to the commercial real estate sector. Sohail has a B.A. Degree from Texas A&M University, a Master's Degree from the George Washington University in Washington D.C., a Certificate in Advanced International Affairs from the Bush School of Political Management, and a Certificate in European Union Politics. Most recently, Sohail earned a Certificate in Real Estate Management from Cornell University and sits on the board of various non-profit organizations, currently serving as the President of the South Asian Chamber of Commerce (SACC) in Houston, Texas.

## Alex Schaefer

Vice President- Transactions, Real Estate, AXA Investment Managers (New York)



Alex Schaefer is Vice President, Transactions for AXA Investment Managers. AXA-IM is part of AXA Group, the Paris-based multinational insurance firm. AXA-IM is the largest real estate asset manager in Europe and one of the largest worldwide. At AXA-IM, Alex focuses on investments across the risk spectrum and across property types in institutional markets throughout the country. Before AXA, Alex worked for TKF Real Estate Investment where he focused on value creating investments in office and mixed-use assets located in urban centers throughout the East Coast. Previously, he was Head of Acquisitions for ALTO Real Estate Funds, a NY based private equity fund that invested in value-add assets across the country alongside veteran local operating partners. Before ALTO, Alex was a Director of Acquisitions for VEREIT, a publicly-traded REIT that owned over 4,000 properties in 49 states. He found himself at VEREIT after working for American Realty Capital in various capacities before eventually transitioning over to a publicly-traded investment vehicle that was merged in to VEREIT. Alex graduated from the University of Connecticut with a B.S. in Accounting before working for Cushman & Wakefield.

## Mo Saraiya

Executive Director, Real Estate Investments, GCM Grosvenor (New York)



Mr. Saraiya focuses on real estate investments. Mr. Saraiya shares responsibility for deal sourcing, due diligence, and relationship management. Prior to joining GCM Grosvenor, Mr. Saraiya worked for CIM Group as a Vice President – Investments, responsible for deal sourcing, structuring and executing real estate debt and equity investments across the residential, office, retail, hospitality, and industrial sectors. Previously, Mr. Saraiya worked at Friend Skoler & Company, a generalist private equity firm investing in middle market companies, and subsequently worked in general management roles for private equity portfolio companies including Hopkins Manufacturing as the Director of Operations Analysis, and Philosophy, Inc., as a Strategic Planning Associate. Prior to that, he worked for The Boston Consulting Group, a global management consulting firm. Mr. Saraiya received his Bachelor of Economics from The Wharton School and Bachelor of Systems Engineering from the School of Engineering and Applied Sciences at the University of Pennsylvania, and his Master of Business Administration in Finance and Real Estate from Columbia Business School.



## Greg Friedman

Managing Principal, Chief Executive Officer, Peachtree Group (Atlanta)

Greg has successfully led Peachtree in more than \$8.7 billion in hotel acquisitions, investments and development since co-founding the company in 2007. Greg has more than 24 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, originating more than \$2.0 billion of hotel debt. Greg is a graduate of the University of Texas at Austin and is a board member of the American Hotel & Lodging Association. He also serves on the real estate fund advisory board for the Texas McCombs School of Business at the University of Texas at Austin, and he is a member of the Real Estate Roundtable, a nonprofit public policy organization based in Washington, D.C., that represents the interests of real estate.



## Greg Zabinski

Managing Director, Peachtree Group (Atlanta)

Greg works with Registered Investment Advisors, institutional investors and family offices throughout the U.S. on Peachtree's investment offerings. Previously, Greg was with Morgan Stanley in Private Wealth Management, analyzing and investing in private equity, hedge funds and option-related strategies. He also worked in the oil and gas industry with ConocoPhillips in Houston, trading West Texas Intermediate (WTI) futures. He began his career as an investment banker with New York-based Citigroup to structure credit facilities for Fortune 500 companies in the automotive, chemicals, metals and mining sectors. Greg earned a Bachelor of Science in Management with a certificate in finance and a minor in economics from Georgia Tech. He served in the Swiss Air Force. As a registered representative with Peachtree PC Investors, LLC, he holds a Series 7 and Series 63 license from FINRA.



## Tim Koltermann

Chief Investment Officer and Partner, RockStep Capital (New York)

Tim Koltermann, Chief Investment Officer and Partner of RockStep Capital, is a thirty-year veteran of Commercial Real Estate and Capital Markets. He is primarily focused on the acquisition, financing and risk management of investments for the company. Prior to joining RockStep Capital, Koltermann held similar senior-level private equity and investment banking investment positions including Walker & Dunlop Commercial Property Funding, Bear Stearns, JP Morgan and JMB Institutional Realty. Koltermann attended the University of Wisconsin-Milwaukee and The University of Chicago Booth School of Business, where he earned his bachelor's degree and MBA in Finance and Business Economics respectively.





## Andy Wester

Principal, Proficio Capital Partners (Boston)

Andy is a Principal on the research team at Proficio Capital Partners. In this role, Andy is responsible for Proficio's investment analysis and due diligence efforts in direct investments across both public and private equity spaces. Additionally, Andy collaborates on the quantitative portion of the team's asset allocation process including building and optimizing Proficio's model portfolio and proprietary asset allocation models. Andy serves on the firm's investment committee and serves in varying capacities for Proficio portfolio companies. Prior to joining Proficio, Andy worked at State Street Bank during and after his undergraduate education where he spent time in the Global Services division servicing institutional investors. Andy has extensive knowledge of a variety and diverse range of equity products, including, single stocks, ETFs, indexes, derivatives, prime brokerage, and capital market activities. Andy holds the designation of Chartered Financial Analyst and is a member of the Boston CFA Society. He holds a B.B.A. in Accounting from the Isenberg School of Management at the University of Massachusetts, Amherst.



## Eddie Phillips

Director of Private Investments, Thirdline Capital (Richmond)

Prior to joining Thirdline, Mr. Phillips served as Director of Private Investments for Heritage Wealth Advisors, a Richmond, VA-based registered investment advisor, and he served on its Investment Policy Committee. Previously, he served in various senior roles over nine years at Xenith Bank, including head of commercial banking, and was a member of the founding team. Prior to Xenith, he spent eighteen years with large banks in commercial relationship management and credit roles. Mr. Phillips earned a Bachelor's in Business Administration with a concentration in Finance from the College of William & Mary, and a Masters of Business Administration degree with high distinction from The University of Michigan's Ross School of Business. Mr. Phillips is an active mentor to founders of early-stage companies through Startup Virginia and Lighthouse Labs. He enjoys tennis and outdoor activities, as well as traveling with his wife to visit their two children.



## Jackie Brady

Managing Director, Head of Global Debt Solutions, PGIM Real Estate (New York)

Jacqueline Brady (Jackie) is a managing director at PGIM Real Estate and a member of the U.S. Business Development group. Based in New York, Jackie heads the firm's Global Debt Solutions team and is responsible for positioning PGIM Real Estate's debt capabilities globally, seeking to broaden the field of prospective investors for real estate credit. She is also a member of the U.S. Debt Executive Council. Jackie joined PGIM Real Estate with more than two decades of experience in the real estate debt capital markets, having served as a principal and portfolio manager at Canopy Investment Advisors and Capmark Investments, LP. Most recently, Jackie was a senior leader at CenterSquare Investment Management where she was responsible for enhancing and developing CenterSquare's relationships with institutional clients and consultants. Jackie currently chairs the PREA Publications Committee and is a member of ULI's Global Exchange Council. She also serves as an independent director of Realty Income Corporation (NYSE:O). Jackie has a bachelor's degree in political science from Haverford College and serves on the Investment Committee of the Board of Managers of the College. She also has a master's degree in international relations and international economics from the Johns Hopkins University.



## Stuart Katz

Chief Investment Officer, Robertson Stephens Wealth Management (New York)

Stuart Katz creates and leads the firm's investment strategy, global asset allocation, portfolio analytics, risk management, manager selection and overall long-term strategic portfolio and near-term tactical asset allocation investment process. Stuart has nearly 30 years of institutional and family office investment experience as both a direct investor and allocator across traditional public asset classes and alternative strategies. Prior to joining Robertson Stephens, Stuart also served as President and Founding Member responsible for establishment of The Heyman Enterprise LLC, a single family investment office as well as Managing Director and member of the Investment Committee of alternative asset management firm, Amber Capital LP. He began his career at Goldman, Sachs & Co., serving in multiple roles including overseeing private equity and private credit investments in the Merchant Banking Division across financial services, media, industrial and other sectors. Stuart earned an MBA from Harvard Graduate School of Business and an AB from Dartmouth College where he graduated Phi Beta Kappa, magna cum laude. He also studied at the London School of Economics.



## Scott Vanderhoff

Executive Managing Director of Investments, Mercatus Partners (Newport Beach)

Scott Vanderhoff is the Executive Managing Director of Investments for Mercatus Partners, LLC. Over the entirety of his career, Scott has acquired and sponsored over 9,000 apartment units representing over \$1.7 Billion in gross asset value, spanning various markets across the United States. Prior to joining Mercatus, Scott spent 11 years at Holland Partner Group where he led the company's multifamily acquisition platform while also spending time in various development roles. Holland was consistently ranked as an NMHC Top 25 Developer nationally and consistently recognized as a "Best In Class" operator. Capital for the firm was raised from large Institutions, including Investment Advisory and Asset Management Firms and Insurance Companies, to high-net-worth individuals. Scott has a Bachelor of Science from Vanderbilt University.



## Chris Spuches

General Counsel & Chief Litigator, Safe Harbor Equity (Miami)

Chris is General Counsel and Chief Litigator for Safe Harbor Equity. He has been with the fund since 2012 and sits on the Investment Committee. Chris is responsible for all the fund's legal matters, including implementing its workout and litigation strategy. He has been a highly successful litigator for over 20 years, having won multimillion dollar jury and bench verdicts in state and federal court. Prior to Safe Harbor Equity, Chris practiced law at Zorrilla & Associates, Ehrenstein Charbonneau Calderin, and Agentis. Chris is active in his community, having served on the Coral Gables Museum Board of Directors for six years, five of them as Chair or Vice Chair. Chris was also Trustee Member of the Coral Gables Chamber of Commerce, where he served on the legislative and government affairs committee and lobbied in Washington D.C. and Tallahassee. He is also a former board member of United Way: Ways to Work and founded Fordham Law Alumni's Miami Chapter. Chris received his B.A. in Diplomacy and World Affairs from New York University, and his J.D. from Fordham University School of Law. He is admitted to practice in Florida, New York, Washington D.C., and several federal courts. He has been recognized and selected as a "SuperLawyer" and "Legal Elite" by Florida Trend Magazine for six consecutive years.



## Jeffrey F. Fastov

Senior Managing Director, Affinius Capital (New York)

Jeffrey F. Fastov, Senior Managing Director and Co-Portfolio Manager- Credit Strategies. Mr. Fastov is responsible for establishing, overseeing and implementing Affinius Capital's strategic direction with respect to all credit initiatives. Prior to joining Affinius Capital in 2013, Mr. Fastov was Co-head of Credit Suisse's Real Estate Finance and Securitization Group. Prior to Credit Suisse, he founded Oasis Real Estate Partners, a capital markets advisor to foreign and domestic financial institutions, private equity funds and other significant real estate credit market participants. From 1992 to 2009, Mr. Fastov was with Goldman Sachs, where he ultimately served as Co-head of the commercial real estate lending business. Mr. Fastov started his career at Moody's Investors Service where he established and led the commercial real estate ratings group from 1983 to 1992. Mr. Fastov received his B.A. from University of Rochester and his M.B.A. from Columbia Business School.



## Drew Iadanza

Principal, StepStone Group (New York)

Mr. Iadanza is a member of the real estate team. Prior to joining StepStone, Mr. Iadanza was a vice president at Pebb Capital Management where he focused on underwriting and structuring real estate acquisitions across geographies and asset classes. Before that he was an analyst at the Baupost Group within their private investment valuation team. Previously Mr. Iadanza was a senior consultant within PwC's financial services asset management vertical. Mr. Iadanza received a BS in business administration from Stonehill College and an MS in real estate finance and development from Georgetown University.



## Clifford A. Booth

Founder & Chairman, Westmount Realty Capital, LLC (Dallas)

A native of Montreal, Canada, Cliff Booth is the founder and chairman of Westmount Realty Capital, LLC. He holds a B.A. Honors in Political Science from McGill University in Montreal and an M.Sc. in Economics from The London School of Economics. Cliff first moved to Dallas in 1979 and founded the Company shortly afterward. Under Cliff's leadership, Westmount has grown from a small local company to a national firm. Deals span markets across the country, and Westmount is now a driving force in cities in the Midwest, Southwest, Southeast, and Western regions. With over 35 years of industry experience, Cliff is recognized as an innovative and leading-edge investor. His relationship-driven approach towards investing has earned the trust of numerous U.S. and foreign institutional and private capital sources, many of which have been investing with Westmount for decades. In 2022, Cliff was named "Executive of the Year" by D CEO. Among his many notable achievements, he was one of the first to assemble a significant portfolio of flex industrial properties in the United States and also a pioneer investor of office and flex industrial in/around Downtown Dallas in the 1990s. In addition, Cliff has been investing in cold storage since the 1990s, long before the e-commerce revolution and the competitive market seen in the space today. To date, Cliff has led the Company to build a portfolio of more than 45 million square feet, representing \$2.9BN of property investments. Cliff chairs the Investment Committee and directly oversees the strategic development and capital initiatives of Westmount. Through his involvement in the Urban Land Institute Board as a Governor and Industrial and Office Parks Council (IOPC-Silver), Cliff shares ideas and insights with other leaders in the real estate industry and is a frequent speaker at conferences and interviewee in the press.



## Alan Snoddy

Managing Director, The Church Pension Fund (New York)

Alan Snoddy is a Managing Director for The Church Pension Fund, an \$17 billion defined benefit plan for the clergy of the Episcopal Church. His primary area of responsibility is coordinating the investment efforts across all private asset classes at the Fund including real estate, venture capital, private equity and other specialty strategies. Prior to his current role, he led the firm's global real estate portfolio for over 20 years. He is also deeply involved with the firm's sustainable investing efforts and has led a number of special projects such as the opening of the Hong Kong office in 2009. Prior to joining The Church Pension Fund in 1996, he worked at Sanford C. Bernstein Inc. in the portfolio management group. He received his undergraduate degree in business from the College of William and Mary and an M.B.A. from Fordham University. Mr. Snoddy received the Chartered Financial Analyst designation in 2000.



## Raphael Sidelsky

Chief Investment Officer, Real Estate, W5 Group LLC (New York)

Raphael Sidelsky is the head of real estate investing for W5 Group, which has offices in New York, Miami, and Switzerland. Established in 2009, W5 Group is the Winter Family Investment Office. W5 Group focuses on innovative real estate investments, either directly or alongside high-quality sponsors and provides capital without any pre-determined hold periods. Target investment sectors include multifamily, student housing, co-living, micro-apartments, single family rental, lodging, and mixed-use. Investment structures include single or programmatic joint ventures, direct, entity level, preferred equity, and mezzanine debt. W5 Group has permanent capital, a flexible mandate, and seeks to create enduring value and long-lasting relationships. Mr. Sidelsky has worked on over \$7 billion of direct, entity level and joint venture real estate investments across a broad array of sectors and markets in the United States and Caribbean. Prior to W5, he worked as a Senior Managing Director at CIII Capital Partners (\$8BN in AUM) and before that as a Managing Director at Fremont Realty Capital, the Bechtel Family Office. He began his career as an architect and worked in Tel Aviv, Berlin, Los Angeles, Johannesburg, and then in New York for Skidmore Owingsand Merrill. Mr. Sidelsky received a Bachelor of Architecture in South Africa and an MBA from Columbia Business School. He is a board member of the Columbia Business School Real Estate Circle.



## Joanne Douvas

Managing Director, BGO (New York)

Joanne Douvas is a Managing Director at BentallGreenOak where she is responsible for capital raising and new business development for its real estate investment funds in the U.S., Europe and Asia. Prior to joining its predecessor firm, GreenOak Real Estate in 2016, she was a Partner and CIO at LGT Clerestory (LGT Capital USA) and co-founded its predecessor firm, Clerestory Capital Advisors, in 2007. Clerestory was a real estate multi-manager that sponsored a series of global real estate funds investing in smaller real estate private equity funds on behalf of some of the largest pension plans. For the eight years prior Joanne was the head of Real Estate Fiduciary Services for J.P. Morgan Asset Management where she oversaw the real estate portion the AT&T Pension Plan that had outsourced all decision-making. She had full authority over strategy, asset allocation, acquisition and disposition decisions, and hiring/firing of separate account managers. Prior to joining J.P. Morgan in 1999, Joanne was a senior asset manager for the Morgan Stanley Real Estate Funds and Clarion Partners.





## Sarah Jancot

Senior Investment Manager, Norges Bank Investment Management (New York)

Sarah Jancot is Senior Investment Manager of Logistics Real Estate at NBIM, Norway's oil fund. NBIM's unlisted logistics portfolio consists of approximately 135 million square feet of warehouses across 12 countries. As of Q2 2023, NBIM's equity investment in private logistics real estate was valued at approximately \$12 billion. Prior to joining the team in 2016, Sarah served in transactions roles in Europe, with a main focus on the office market. Over her career, Sarah has been involved in over \$10bn of completed transactions. Sarah holds a Master of science in Management from ESSEC Business School, France. Sarah serves on the RICS Americas World Regional Board and is also a Board member of Green City Challenge, a NYC-based not-for-profit.



## Abbe Borok

Managing Director and Head of US Debt, BGO (New York)

Abbe Franchot Borok is Managing Director and Head of US Debt for BentallGreenOak (BGO). In her role, Abbe has overall responsibility for the BGO U.S. Debt business, including management of the all core, core plus and high yield debt strategies. Abbe also leads the management and business development activities for the U.S. Debt business. Abbe has over a decade of experience in the Commercial Real Estate Capital Markets and Investment Management space. Most recently, Abbe was Managing Director and Head of CRE & Debt Strategies at The Amherst Group. In this role, Abbe was responsible for launching and managing two CRE Debt investment vehicles and overseeing capital markets activity across Amherst's Debt and Equity businesses. Prior to joining Amherst Capital, Abbe was a senior member of the NYC-based Commercial Real Estate Lending team at CapitalSource, a division of Pacific Western Bank. Abbe has broad experience in sourcing and underwriting commercial real estate debt, with a focus on high yield loans backing transitional or value add business plans. Abbe holds an MBA from Columbia University and a BA in Communications from the University of Pennsylvania. She is a member of the Board of Governors of CREFC, most recently serving as co-Chair of the HYDRA Forum. Abbe also serves as a member of the mentorship committee for WX, which promotes and supports women in commercial real estate, and a frequent speaker and panel participant at industry events.



## Bora Ozturk

Principal, March Capital Fund (San Francisco)

Bora Ozturk is the Founder and Principal of March Capital Fund, a private equity real estate fund and development company that invests in underutilized real estate assets in the San Francisco Bay Area. March Capital Funds have acquired, designed, permitted, and managed dozens of successful projects, all resulting in double-digit IRRs, even in downturns. Project costs range from \$10MM to \$100MM. Prior to starting March Capital Funds, Mr. Ozturk was an investment advisor to ultra-high-net-worth families and small to mid-size companies. In his advisory role, he advised family offices and assisted in asset allocation, alternative asset, and real estate strategies. Earlier, Mr. Ozturk held various leadership positions at Wells Fargo. He started his career at Wells Fargo as a senior analyst. Later on, he managed 500 employees in private banking, retail banking, and business banking channels. In his last three years at Wells Fargo, he was responsible for structuring interest rate derivatives, which were collateralized by commercial real estate investments. In his early career, Mr. Ozturk held positions as a management consultant at Monitor/Deloitte and as a brand manager at Unilever. He received an MBA from the Yale School of Management and a B.S. in Industrial Engineering from METU.



## Barry Hammerman

Global Head of Real Estate, Quilvest Capital Partners (New York)

Barry Hammerman joined Quilvest Capital Partners in 2010 as one of the initial members of the real estate investment team. He is a Partner in the New York Office and Global Head of Quilvest's real estate investment activities, where he is responsible for executing direct real estate investments, managing the existing portfolio, and pursuing strategic initiatives. Barry is a registered officer of Quilvest Securities (US Broker Dealer). Prior to joining Quilvest, Barry was a member of the investment team in DLJ/Credit Suisse's Real Estate Private Equity Group since 2001, where he was responsible for acquiring and managing a diversified portfolio of opportunistic real estate investments for their discretionary funds. Barry graduated summa cum laude from the Wharton School at the University of Pennsylvania, with degrees in finance and accounting.



## Michael Sabin

Co-head of the U.S. Funds & Investment Management Group, Clifford Chance (New York)

Michael Sabin is a Funds & Investment Management Partner and co-head of the U.S. Funds & Investment Management Group at Clifford Chance. Michael specializes in advising sponsors on the structuring and formation of private funds and accounts across all strategies, including real estate, credit, buyout, energy and infrastructure, as well as related strategic transactions and internal arrangements. He also advises sponsors and investors in connection with complex secondary transactions and fund restructurings, and he represents several prominent family offices and other institutional investors in their most complex fund investments, such as anchor investments and GP stakes acquisitions. He is ranked as a top private fund formation lawyer in each of Chambers USA, The Legal 500 U.S. and IFLR1000 U.S.



## John Maimone-Medwick

Investment Director, YMCA Retirement Fund (New York)

John Maimone-Medwick joined the Fund in March 2017. He is primarily involved in the real estate, natural resources, private equity, venture capital, and diversifying asset classes. He also assists with fund-wide projects, such as asset allocation and exposure monitoring. Prior to joining the Fund, John was at Hall Capital Partners. While at Hall Capital, he assisted with the investing, monitoring, and managing of global multi-asset class portfolios for families, endowments, and foundations. John earned a BA in economics from Williams College, as well as an MS in Real Estate with Distinction from the NYU Schack Institute of Real Estate.



## Kenneth A. Munkacy

Managing Partner, KAM Capital Advisors (Boston)

Ken Munkacy serves as a board member and senior advisor to investment funds, real estate companies, and boards. He previously co-founded Kingbird Investment Management, where as Senior Managing Director from 2017 to 2023, he oversaw expansion into 29 markets and 76 assets, with over 15,000 units and a \$2.9B GAV. With 35 years of global multi-asset class experience, he has led real estate investment funds, development, and operating companies in 23 states and 12 countries, representing over \$4 billion in transactions. He previously held senior executive positions with GID Investment Advisers (Boston); Starwood Capital (Tokyo); GE Capital (Prague); TrizecHahn (Hong Kong) and Golub & Co.(Chicago). He graduated from Franklin and Marshall College and the University of Pennsylvania with a Master in City Planning. He has served on over 20 public/private boards, including Co-Chair of the Global Exchange Council with the Urban Land Institute.

## William Ward

Partner & Managing Director, Real Estate, TwinFocus (New York)



Wil oversees the firm's Real Estate investing initiatives across various direct and fund investments at TwinFocus. He is responsible for sourcing and leading the diligence efforts of deals for TwinFocus' real estate portfolio as well as on an ad-hoc basis on behalf of the firm's clients. Wil manages the real estate team where he is responsible for overseeing the structuring and ongoing monitoring of investment opportunities across sectors including multi-family, hospitality, industrial and commercial. Wil works alongside executive management and the firm's Managing Directors to set macro investment policy as specifically related to real estate trends. Prior to joining TwinFocus, Wil was a Managing Director at Kimberlite Advisors where he was involved in a range of real estate advisory and capital raising transactions involving developers, owners, and operators of real estate assets across multiple sectors. Before working in an advisory role at Kimberlite, Wil began his real estate investing career with the real estate principal investing business of Lazard Alternative Investments where for 8 years he held roles at both the fund management level, as well as working with portfolio operating companies. Before joining Lazard, Wil began his post-MBA career as an Associate in GE Capital's Structured Finance Group, specifically in the Global Energy portfolio management area. Directly out of college, Wil was an officer in the United States Army where he served both domestically and internationally, achieving the rank of Captain before leaving to continue his education at Columbia Business School.





# PRE-EVENT NETWORKING COCKTAIL

Wednesday, September 6th

5:30pm – 8:30pm ET

Location: Clifford Chance US LLP

31 West 52nd Street, New York, NY 10019

Sponsored By:

**C L I F F O R D  
C H A N C E**

# AGENDA OUTLINE

7:30 AM ET

## Registration & Breakfast Networking

Sponsored by:



8:30 AM ET

## Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

8:30 AM ET

## The State of US Real Estate

Presenter:

Dags Chen, CFA, Head of U.S. Real Estate Research & Strategy, Barings

9:00 AM ET

## Institutional LP Perspectives

Leading institutional investors discuss what is real estate's role in an investor's portfolio, How much do they allocate to real estate, what is their process for manager selection and how are they viewing this new high interest rate environment. LPs discuss the most compelling investment ideas they have come across and how to make money in this market globally?

Moderator:

Joanne Douvas, Managing Director, BGO

Panelists:

Sarah Jancot, Senior Investment Manager, Norges Bank Investment Management

Thomas B. Brown, Partner, LGT Capital Partners

Mo Saraiya, Executive Director, Real Estate Investments, GCM Grosvenor

Alan Snoddy, Managing Director, The Church Pension Fund

10:00 AM ET

## AM Networking Break

Sponsored By:



THE US INSTITUTIONAL REAL  
ESTATE MEETING EAST





# AGENDA OUTLINE

10:30 AM ET

## Disciplines In Distress That Transcend Market Cycles

Interviewer

Kenneth A. Munkacy, Managing Partner, KAM Capital Advisors

Keynote Speaker:

Jeff Krasnoff, Chief Executive Officer, Rialto Capital Management

11:00 AM ET

## Opportunistic: Playing Through The Turmoil

Leading real estate investment firms discuss their investment strategies as they navigate through choppy waters.

Moderator:

Drew Iadanza, Principal, StepStone Group

Panelists:

Greg Friedman, Managing Principal, Chief Executive Officer, Peachtree Group

Sohail Hassan, Co-Founder & Managing Partner, MarketSpace Capital

Chris Spuches, General Counsel & Chief Litigator, Safe Harbor Equity

Clifford A. Booth, Founder & Chairman, Westmount Realty Capital, LLC

Bora Ozturk, Principal, March Capital Fund

12:10 PM ET

## To Equity Or Not To Equity

Leading real estate investment firms discuss deploying and raising equity in today's market.

Moderator:

Tal Peri, Head of U.S. East Coast and Latin America, Union Investment Real Estate GmbH

Panelists:

Alex Schaefer, Vice President- Transactions, Real Estate, AXA Investment Managers

Barry Hammerman, Global Head of Real Estate, Quilvest Capital Partners

Tim Koltermann, Chief Investment Officer and Partner, RockStep Capital

# AGENDA OUTLINE

1:00 PM ET

## Networking Luncheon

Sponsored by:



2:00 PM ET

## OCIOs & RIAs

Outsourced Chief Investment Officers and Registered investment advisors discuss what is real estate's role in client portfolios. How are they re-balancing client portfolios due to the recent downturn in equity markets? Are clients overallocated to private real estate.? Which asset classes are they finding the most interest? What is their process for manager selection, and do they commit to direct deals and co-investments?

**Moderator:**

**Greg Zabinski**, Managing Director, **Peachtree Group**

**Panelists:**

**Andy Wester**, Principal, **Proficio Capital Partners**

**Eddie Phillips**, Director of Private Investments, **Thirdline Capital**

**Stuart Katz**, Chief Investment Officer, **Robertson Stephens Wealth Management**

3:00 PM ET

## Real Estate Debt Strategies

Real estate debt provides a consistent yield opportunity that is attractive from an asset-backed perspective and has low volatility. Panelists discuss the direct lending environment for acquisitions and development and securitized real estate loans in the secondary market. They discuss the flexibility of their capital, structuring expertise and deep operational perspectives across Senior loans, mezzanine loans and preferred equity.

**Moderator:**

**Jackie Brady**, Managing Director, Head of Global Debt Solutions, **PGIM Real Estate**

**Panelists:**

**Abbe Borok**, Managing Director and Head of US Debt, **BGO**

**Jeffrey F. Fastov**, Senior Managing Director, **Affinius Capital**

**John Maimone-Medwick**, Investment Director, **YMCA Retirement Fund**

# AGENDA OUTLINE

4:00 PM ET

## Family Office Outlook

US single family offices and multifamily offices discuss their view and appetite for real estate allocation. Is there a preference for direct/co-investment, Co-GP strategies, and/or fund investment?

Moderator:

**Michael Sabin**, Co-head of the U.S. Funds & Investment Management Group, **Clifford Chance**

Panelists:

**Raphael Sidelsky**, Chief Investment Officer, Real Estate, **W5 Group LLC**

**Scott Vanderhoff**, Executive Managing Director of Investments, **Mercatus Partners**

**William Ward**, Partner & Managing Director, Real Estate, **TwinFocus**

5:00 PM ET

## Cocktail Reception

Sponsored by:



6:00 PM ET

## End of Conference



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 July 21st**

~~Pre-Registration: \$2,000 USD~~ **Ends August 25th**

**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.

**Roy Carmo Salsinha**

President & CEO  
T: +1-646-688-3375  
roy.salsinha@carmocapital.com

**Catherine Correia**

Vice President, Real Estate & Marketing  
T: +1-646-688-3207  
catherine.correia@carmocapital.com

**Flavia Correia**

Vice President, Real Estate  
T: +1-646-688-3207  
flavia.correia@carmocapital.com

**Heriberto Acevedo**

Vice President  
T: +1 347 534 8508  
heriberto@carmocapital.com

**Erick Cruz**

Senior Vice President, Private Equity  
T: +1-646-688-5327  
erick.cruz@carmocapital.com

**Renato Ferreira**

Vice President, Private Equity  
T: +1-646-688-3375  
Renato.ferreira@carmocapital.com

**Nicolás Rodriguez**

Vice President, Private Equity  
T: +1-646-688-3205  
nicolas@carmocapital.com

**Melissa Ribeiro**

Associate  
T: +1-516-726-4447  
melissa@carmocapital.com





THANK YOU

49 HUNTINGTON BAY ROAD  
HUNTINGTON, NY 11743  
[www.carmocompanies.com](http://www.carmocompanies.com)

