



THE US INSTITUTIONAL REAL ESTATE MEETING WEST

April 3 & 4 2023
Fairmont Miramar, Santa Monica, CA



TABLE OF CONTENTS

Introduction	3
By The Numbers	4
In Attendance	5
Previous Sponsors	6
Institutional Partners	7
Sponsors	8-11
Speaker Bios	12-19
Conference Agenda	20-24
Participation Options	25-29
Carmo Contact Info	30





THE US INSTITUTIONAL REAL ESTATE MEETING WEST

FAIRMONT MIRAMAR, SANTA MONICA, CA
APRIL 3 & 4, 2023

Dear Colleague,

It is with great pleasure that I invite you to the 3rd Annual US Institutional Real Estate Meeting West. 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 Santa Monica.

Best,

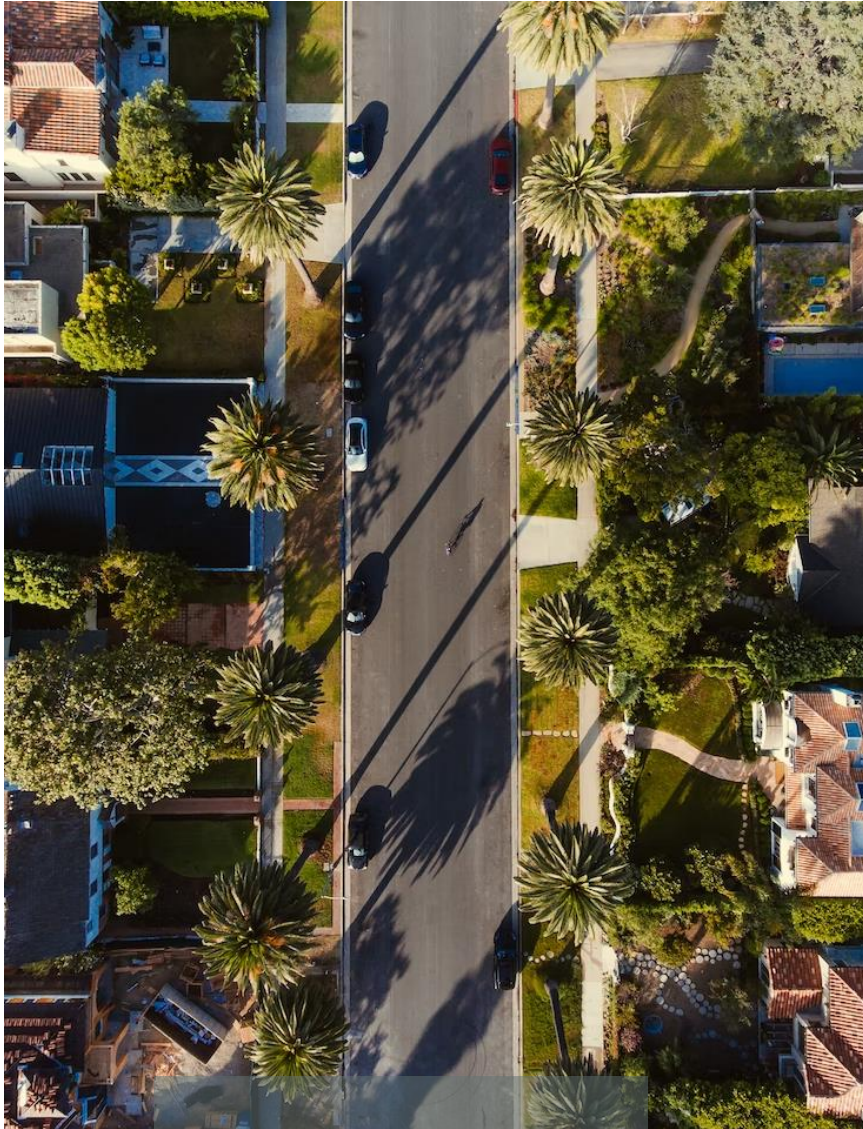
Roy Carmo Salsinha
President, CEO
Carmo Companies



BY THE NUMBERS

- \$5+ Trillion AUM in attendance
- 150+ Total participants
- 75+ Institutional & Private Wealth Investors
- 75+ 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

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.



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.



Darwin is a real estate investment management platform focused on the single-family rental opportunity, enabling investors to invest anywhere simply with confidence. We accomplish this by providing investors with a comprehensive, end-to-end solution for the acquisition, renovation, and management of single-family rental properties. Our platform combines the power of proprietary Darwin technology and the expertise of local, in-sourced Darwin professionals to make an investment in residential real estate simple and transparent. This integrated approach to investment and management in an intimidating asset class is enabling investors to achieve specific investment goals and diversify their financial positions with hard assets. The advent of a purpose-built, integrated software and operations solution will drive participation in the single-family asset class by large institutional funds because it will enable investors to actively analyze, monitor, and manage investment returns. Darwin's ability to tie local property management operations to investment decisions is radically decreasing sub-optimal investment performance.



2023 SPONSORS



Greenbridge is a fully integrated commercial real estate platform that specializes in the ownership, property management, leasing, construction and turnaround of value-add and core plus commercial properties. Partners Sean Hashem and Fareed Kanani established the firm in 2012 with a focus on purchasing underachieving projects with the highest potential of becoming “best in class” properties. For over 30 years, the expert team has worked together to apply its resources to the success and optimal repositioning of each asset purchased and has been dedicated to maintaining that standard of excellence. Greenbridge is constantly looking for innovative yet practical ways of improving property level metrics with a keen focus on operational effectiveness. Our construction expertise enables Greenbridge to quickly identify and implement creative repositioning strategies on all projects purchased, creating immediate equity for the asset and its partners.



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.



Mack Real Estate Group, LLC is an integrated real estate investor, developer, operator, and lender with offices across the United States. Founded in 2013, with roots in a family business dating back to the 1960s, MREG provides real estate investment management, development and property management services through several affiliates. MREG’s credit-oriented affiliate – Mack Real Estate Credit Strategies, L.P. – seeks to fulfill institutional borrowers’ needs for sophisticated, flexible and reliable debt capital solutions. MREG aims to generate attractive risk-adjusted returns for investors while being a trusted counterparty sought out by a wide variety of real estate market participants.



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.



2023 SPONSORS



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.



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.



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.



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



Westlake Realty Group is a full-service, family-owned real estate investment and development firm with extensive experience in all asset classes of real estate in the San Francisco Bay Area and Western United States. The Company's current holdings include a diverse portfolio of multi-family, hospitality, retail, self storage, office, and mixed-use properties. Over the last fifty years, Westlake has acquired, developed, and operated properties in the United States, Mexico, China, and Japan. Westlake has consistently delivered superior risk adjusted returns through diligent asset management and local knowledge in the markets they operate in.



Jonathan Bren

Founder, Bren Ventures (New York)

Jonathan Bren is the founder of Bren Ventures LLC, and has been an investor in hedge funds and real estate for the past 30 years. Jon worked for 2 different family office investors in the 1990s and 2000s investing in hedge funds and sponsoring and building hedge fund businesses. In addition, to investing in hedge funds, Jon also invested in several real estate deals and real estate businesses related to his family. In 2016 Jon worked for KBS, a commercial real estate investor, founded by his father, Peter Bren. Jon now works with some real estate investors and a real estate platform to provide capital markets solutions and create liquidity in specific real estate assets through equity recaps, secondary trades and exchanges in real estate interests, and direct investment. Jon is from Los Angeles, CA and lives in New York City, and travels between NYC and LA/Newport Beach often for business and family.



Andrew Kaminski

Vice President, Cliffwater (Los Angeles)

Andrew Kaminski leads the real estate equity research at Cliffwater based in Marina del Rey, CA. Cliffwater is an independent investment adviser and asset manager that provides research, advisory, and investment services. Andrew previously worked on the asset management team at a developer, held a role as a placement agent, and was also on the acquisition and development team of another real estate developer. Andrew graduated from The University of Pennsylvania (Wharton) with concentrations in real estate and finance.



Matthew Karp

President, Amstar (Denver)

Matthew Karp is President, Americas at Amstar and is responsible for U.S. acquisitions and new business initiatives as well as overseeing the asset management of existing positions. Mr. Karp joined the firm in 2017 and has over 20 years of real estate investment experience. Before joining Amstar, Mr. Karp was a Partner and Head of Real Estate for TriSpan LLP, an alternative investment management group backed by a consortium of family offices and private investors, where he directed all elements of investment strategy and capital deployment within real estate. Earlier in his career, Mr. Karp held various senior investment and management positions at Cerberus Capital Management, CPG Real Estate, and Savanna Partners where he was responsible for sourcing, underwriting, structuring, negotiating and asset managing opportunistic real estate equity and debt investments across the U.S. and Latin America/Caribbean. Mr. Karp graduated with a B.S. from Cornell University and received his MBA with honors from Columbia Business School. Since 2018, Mr. Karp has served on the Board of Trustees of the Government Development Bank Debt Recovery Authority following his appointment by the Governor of the Commonwealth of Puerto Rico.

William DeMar

Senior Director, Choreo (Reno)



William (Bill) DeMar is a Senior Director at Choreo, LLC, a registered investment adviser serving affluent families and business owners. Prior to recently joining Choreo, Bill served as Principal and Co-founder of EnsoWealth Management LLC. He has been responsible for many aspects of building and growing an RIA firm, including serving as Enso's Chief Investment Officer. Mr. DeMar also provides advisory services to accredited investors and high-net-worth individuals, often assuming the role of a family's de facto Chief Financial Officer. He has personally invested and placed clients in private real estate transactions, limited partnerships, QOZ investments, 1031 transactions, and other liquid/illiquid alternative investment vehicles. Mr. DeMar focuses his business on servicing clients that have built their wealth in real estate, serving as a fiduciary and trusted advisor to those families. As part of that evolution, he has developed relationships with sponsors, developers, operators, and managers that provide investment vehicles to high-net-worth individuals and multifamily offices. Mr. DeMar has been involved in the securities industry since 2002. He earned a degree in Political Science with a minor in History from UC Riverside and he holds a CFP® Designation, his Series 66, and Insurance License.

Chris Dzurinko

CIO, Lightning Tree Capital (Denver)



Chris Dzurinko, CFA is the Chief Investment Officer for Lightning Tree Capital which oversees the operations and investments of a multi-generational single-family office. The family owns and operates a diverse real estate portfolio including multi-family, hospitality, industrial, and office properties; agriculture; and various land holdings. Previously, Chris was a Partner and the Chief Investment Officer for a Denver-based multi-family office that provides investment and family office services to families across the U.S. Immediately preceding his time at the MFO, Chris was a senior financial analyst for the Alta Group, a boutique private equity firm serving the needs of two international single-family offices. Before that, he spent five years at JPMorgan and other Wall Street firms conducting sell-side equity research in the technology sector. Chris started his career at Ernst & Young as a real estate consultant. A graduate of Pepperdine University, Chris is a CFA charterholder.

Sean Davatgar

Chairman & CIO, Dava Capital (Los Angeles)



Sean Davatgar is the Chairman & CIO of Dava Capital. Dava capitalizes on investment opportunities across the global capital markets & industries on I.P, providing alternative finance through a PE structure to emerging or growth stage companies. He has investments in Health Care, Technology, Construction, Government, Energy and Media. He was previously worked as Majority JV Partner at Fortress Investment Group from 2014-2020, Senior Business Adviser at Houlihan Smith & Company from 2007-2009. He also founded ELITE MEDICAL SUPPLY in 2004 and Mobile Accessories in 1999.



Lino Campanile

President and Chief Financial Officer, Westlake Realty Group/ Frontera West (San Francisco)

Lino Campanile is the President and Chief Financial Officer for Westlake Realty and Frontera West. He oversees all financial operations, investment strategy, and development projects. Lino brings with him over twenty years of experience in the real estate industry, with knowledge of multi-family residential, self-storage, single-family residential, office, retail, hotel, and mixed use. Lino previously served as the Chief Financial Officer for Dwell Finance, which was sold to B2R, a unit of Blackstone in 2015. Prior to Dwell Finance, Lino was the Vice President of Financial Planning & Analysis at Carmel Partners. Lino graduated Magna Cum Laude with a Bachelor's degree in Business Administration and Accounting from San Francisco State University.



Dr. Joseph Julian

Managing Director, Highmore (Los Angeles)

Joseph's experience includes working on structuring and capital formation of the real estate industry having participated in more than 3 million square feet of commercial real estate across the entire risk-return spectrum in multiple product types and geographies. Joseph is a member of the investment committee and portfolio management team, as well as being involved in product development, and investment selection for the firm's institutional clients. He is the lead portfolio manager for Highmore's Opportunity Zone real estate development fund. Prior to joining Highmore, he was Director of Investments and portfolio manager at Oppenheimer & Co. where he designed and managed investment portfolios for the private client group of Oppenheimer with a specialization in alternative investments, including real estate, and private equity. Before joining Oppenheimer Joseph was Head of Absolute Return Strategies for Witenberg Investment Companies / Properties Inc. where he provided portfolio management, due diligence, operator/manager selection, and risk management overseeing \$5 billion of institutional assets. Joseph received his B.A. and M.A. degrees from California State University, cum laude, areas of study: mathematics, economics, and science and attended UCLA and earned his Doctorate Ph.D. degree from the University of California, San Diego in La Jolla, CA.



Michael Ashley Schulman

Partner & Chief Investment Officer, Running Point Capital Advisors (El Segundo)

As chief investment officer and a founding partner of Running Point Capital Advisors, Michael Ashley Schulman is responsible for Running Point's global macro outlook, research, investment strategies, asset allocation, portfolio management, and impact and social assessments across public and private investments. He has also effectively consulted for the World Federation of Exchanges in Paris, the Colombian Financial Exchange, and several high-tech firms, and has presented at forums and conferences in California, New York, Malaysia, Argentina, and Spain. In the past year he has been quoted by Reuters, Forbes, Nikkei, Investor's Business Daily, International Business Times, S&P Global, Fox, USA Today, and MarketWatch. Michael has an MBA from MIT Sloan, a CFA designation, and a BA in Economics from UC Berkeley. Within the community, Michael is a board member of Bridge Funding Global's Permanent Selection Committee which selects top female emerging managers in venture capital to be matched with investors. Additionally, Michael served on the advisory board of an impact fund and several venture start-ups, and is a past president and board member of the CFA Society of Orange County. In his spare time, he enjoys art and adventure travel, including kayaking the Stockholm archipelago and mountain biking in Mongolia to raise funds for underprivileged Mongolian children.



Thomas Hester

Managing Director, StepStone (San Francisco)

Mr. Hester is a member of the real estate team and focuses on various investment and portfolio management activities. He is also involved in the Firm's responsible investing initiative. Prior to StepStone, Mr. Hester was a senior vice president at Courtland Partners, Ltd., an international real estate advisory firm which integrated with StepStone Real Estate. Previously, Mr. Hester was director of accounting and financial reporting and chief compliance officer at Mesa West Capital, and CFO at Somera Capital Management, both real estate investment managers. Mr. Hester previously held principal positions at the McMahan Group and Westwood Consulting Group and was a senior manager at Kenneth Leventhal & Company/Ernst & Young. Mr. Hester is a current member of the NCREIF PREA Reporting Standards Council. Mr. Hester received a BS from San Diego State University and attended the University of California, Los Angeles, John E. Anderson Graduate School of Management.



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.



Greg Alpert

Partner, Alpert Investments (Denver)

Runs a SFO office investing in different asset classes across equities, real estate and alternative investments. Real estate investor focused on multifamily and residential development deals. Previously worked with entrepreneurs focused on scalable education solutions in emerging markets. MBA from CU Boulder and an undergraduate degree from the University of Virginia.



Ricardo Outi

Founder and Managing Partner, AIC Capital (Miami)

Ricardo is the Founder and Managing Partner of AIC Capital, a platform as a service that provides Institutions, Family Offices and High Net Worth Individuals with intellectual capital and access to alternative investment solutions. Ricardo has 20+ years of global wealth management and alternative investments experience. Prior to founding AIC Capital, Ricardo worked at Citigroup in senior roles including senior investment analyst in Brazil, head of strategy and business development in Miami, head of marketing and sales strategy in Tokyo, head of Citi Ventures-Asia in Singapore. Ricardo has an MBA from the University of Chicago Booth School of Business, with concentration in real estate investing.



JR Pearce

Investment Officer, Sacramento County Employees' Retirement System (Laguna Niguel)

JR Pearce is a Senior Investment Officer with Sacramento County Employees' Retirement System (SCERS), an \$11 billion California public pension plan, responsible for portfolio construction and oversight for SCERS' private market investments in private credit, real estate, and real assets globally. Prior to joining SCERS in 2013, Mr. Pearce was actively involved in the institutional real estate industry for over 25 years. During his career, Mr. Pearce served in various senior leadership positions in real estate investment, development, and finance with a range of organizations including institutional investment manager, real estate development company, and real estate owner-operators. Mr. Pearce's financial background along with his broad real estate experience has enabled him to direct and oversee over \$7 billion in real estate development and investment projects across the United States. Mr. Pearce earned his MBA in Finance from Loyola College, and is a cum laude graduate in Finance and Economics from Towson University. Mr. Pearce is a Certified Public Accountant (in-active) and holds a California Real Estate Brokers license.



Andy Boyum

COO, Darwin Homes (Los Angeles)

Andy Boyum has over 20 years of real estate experience, the last 12 of which have focused on institutional single- and small multi-family rental product types. He is currently the Chief Operating Officer at Darwin Homes, overseeing all aspects of the company's Acquisitions, Renovation, Leasing and Property Management activities. Prior to his role at Darwin Homes, Andy was a General Partner and Senior Vice President of Property Operations at SFR3, a tech-focused, value-add single-family rental fund with over 12,000 homes under management. Before that, Andy was Head of Operations at Roofstock, an online marketplace for institutional buyers and sellers of income-producing residential assets. Andy began his career in institutional single-family rental at Invitation Homes, where he led the Western United States Acquisitions team before building out the National Disposition platform. Andy, his wife and their chocolate lab live in Corona Del Mar, CA.



Henry Wilson

Chairman, Wayne County Employers Retirement System (Detroit)

Henry Wilson has 25 years of service for the Wayne County Sheriff Department, current rank of Sergeant. In June of 2010, Henry obtain his Master's Degree in Public Administration (State and Local Government) Henry currently serves as a trustee for the Wayne County Employees Retirement System, for the last 7 years. Of those 7 years, Henry has served as the Chairman for the past 3. The Wayne County Employees' Retirement System has over 1 Billion Dollars in assets under management. Of the assets that's under management, about 15% is earmarked for the real estate platform.



Seth Wolkov

Founder & CEO, Evermore Partners (Denver)

Seth has more than 25 years of real estate private equity and financial services industry experience. He is the founder and CEO of Evermore Partners, a commercial real estate investment firm focused on the Rocky Mountain region. Previously, Seth was Managing Partner and President of The Madison Companies, a Denver-based real estate private equity firm. In this capacity, Seth invested over \$400MM of equity capital on behalf of family offices, wealth advisors, ultra-high net worth investors, and institutional investors, across a wide variety of commercial real estate and hospitality companies with an aggregate transaction value of over \$1B. Seth's professional affiliations include YPO (Rocky Mountain Chapter), the Urban Land Institute, CiviCO, the University of Colorado Real Estate Council, and the Metro Denver Executive Club. Seth currently serves on the Board of Directors for YPO Rocky Mountain. Growing up on Colorado's Western Slope, Seth enjoys backpacking, skiing, cycling and golf.



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.



Jonathan Epstein

Managing Partner, BentallGreenOak (Los Angeles)

Jonathan Epstein is a Managing Partner at BentallGreenOak based in Los Angeles. He is responsible for the firm's Core Plus investing initiatives in the United States and its Temperature Controlled Logistics platforms in North America. Prior to the merger of Bentall Kennedy and GreenOak Real Estate in 2019, Jonathan led GreenOak's U.S. Value-Add Fund Series investment efforts and the Core Plus investing initiative in the western United States and was responsible for the firm's investment strategy, sourcing, structuring, and asset management for the western region. Prior to joining the firm, Jonathan was president of Hackman Capital Partners and co-managing partner of the firm's investment entities from 2006 to 2010. Hackman Capital grew, under Jonathan's direction, from owning and managing 3 million square feet, of logistics assets, to 16 million square feet in nine states within the United States. Prior to joining Hackman Capital, Jonathan spent 14 years at Lehman Brothers and was primarily responsible for acquiring or investing in over \$20 billion in real estate, real estate-backed debt instruments, and real estate-related companies in the United States, Europe, and Asia. Between 1997 and 2005, Jonathan built and led Lehman Brothers Asian real estate investing, special situation and distressed investing, real estate investment banking, and lending efforts based in Tokyo. Prior to Lehman Brothers, Jonathan worked at Merrill Lynch, where he began his career in 1989 in structured finance and principal investing. Jonathan is a graduate of the School of Management at Boston University.

Martin Slusser

Founder and Managing Partner, Magellan Value Partners (Los Angeles)

Founder of Magellan Value Partners ("MVP") and Co-Founder of The Magellan Group (established in 1990), Mr. Slusser brings over 40 years of experience working in commercial real estate development, where he focuses on Industrial and Storage, developing over 13M SF. Prior to founding the firm, Mr. Slusser co-founded The Magellan Group in 1990 where he raised The Magellan Industrial Fund and developed over 6 million SF of industrial and self storage properties. This included the development and sale of a 7-property regional storage brand, Magellan Storage, and the development of the award-winning, 500,000 SF industrial project, Magellan Gateway. Prior to Magellan, Martin was Division Partner in the Los Angeles office of Trammell Crow where he acquired and developed industrial valued at \$350M; negotiated 211 leases; and managed 13M SF. Martin leased over 3M SF of industrial for three consecutive years, earning the Top Industrial Leasing Award each respective year. Martin began his career working for Morgan Stanley in New York City as an analyst. Mr. Slusser received an MBA from Stanford Graduate School of Business and holds an AB Degree from Stanford University. He is a member of the Stanford University President's Fund.



Fareed Kanani

Principal, Greenbridge Investment Partners (Los Angeles)

Fareed oversees the acquisition, asset and property management of Greenbridge properties and works hand in hand with the Greenbridge team to structure purchases, co-ordinate property improvement plans, and implement property optimization strategies. Fareed actively oversees Greenbridge's portfolio and applies customized improvement and turnaround programs that maximize returns on investment; with special focus on acquiring projects that have a high profit margin spread on cost; given each project's designated capital structure. Fareed maintains strong working relationships with lenders and the capital markets to structure deals appropriately. Fareed has over 20 years of experience serving in Senior Banking positions and management roles and has served fortune 500 companies in the procurement, asset management and disposition of large commercial portfolios with particular experience as manager of distressed commercial and homebuilder construction assets.





Brett Katz

Managing Director- West Coast Originations, Mack Real Estate Credit Strategies (Los Angeles)

Brett Katz is a Managing Director and head of west coast loan origination for Mack Real Estate Credit Strategies (MRECS). Brett has over twenty years of debt capital markets experience in New York and Los Angeles, covering mortgage/mezzanine financing, structured products/CMBS and construction lending across all commercial real estate asset classes. Prior to joining MRECS, Brett was head of west coast debt capital markets for advisory and brokerage firm Hodges Ward Elliott. Prior to that, Brett was co-head of debt capital markets for Cantor Commercial Real Estate (CCRE). Brett began his career at Credit Suisse within the Real Estate Finance Group, focusing on large loan origination and structuring. Brett has a BA from Cornell University.



Douglas W. Manchester

President, Manchester Texas Financial Group (Austin)

Expanded his family office from San Diego to Austin where he oversaw the development of 1048 key Fairmont Austin, opened in 2018, currently working on building another 1100 key Manchester Fairmont San Diego property on the waterfront of San Diego. He currently presides over Manchester Hotel Group and is passionate about building & adding more properties to this portfolio of Manchester Financial Group.



Lei Farrand

Director, March Capital Management (Los Angeles)

Ms. Farrand is responsible for leading global fundraising and investor relations for the firm, developing, structuring, and managing all investor relationships and capital formation strategies. Prior to joining March Capital, Ms. Farrand held leadership roles with Kingbird Investment Management, Situs, and Walton Global Holdings. She has extensive experience in real estate investment management and financial services, having worked directly for and with private and institutional owners of real estate in the US, Latin America, Asia, and Europe – across the capital structure and property types. She began her career at the Vanguard Group. Ms. Farrand has an MBA from the Thunderbird School of Global Management with honors and a BA, magna cum laude, from The University of Arizona. She previously maintained Series 7, 6, 63, and 66 Securities licenses, and is a Certified Financial Planner.



Robin Potts

Partner and Chief Investment Officer of CPRE, Canyon Partners (Los Angeles)

Robin Potts is a Partner and Chief Investment Officer for CPRE. Ms. Potts has been with Canyon Partners since 2006, and is responsible for overseeing all aspects of Canyon Partners' real estate platforms and holds a seat on all Canyon Partners real estate investment committees. During her tenure at Canyon Partners, Ms. Potts has facilitated the acquisition, financing and development of over \$17.5 billion of commercial real estate transactions across all asset classes including multifamily, condominium, office, retail, hospitality, industrial, senior housing, student housing, self-storage and mixed-use. Ms. Potts previously worked in the Financial Institutions Group of Credit Suisse in Los Angeles where she focused on equity, debt and M&A transactions in the mortgage real estate investment trust sector. Ms. Potts is a graduate of Harvard University, where she earned a B.A. degree in Economics.



Lindsay Bachner

Managing Director , Evercore (Los Angeles)

Lindsay Bachner a Managing Director in Evercore's Real Estate Capital Advisory group. She is responsible for coverage of institutional investors and capital allocators across the Western US, Western Canada and Australia, and is also involved in originating and managing capital advisory mandates for private real estate sponsors. Prior to joining Evercore, Ms. Bachner was a Vice President in Greenhill's real assets capital advisory group, which spun out to form the Evercore Real Estate Capital Advisory group in 2018. Prior to that, Ms. Bachner worked at Mesa West Capital in Los Angeles, focused on capital raising and investor relations. Ms. Bachner joined Mesa West Capital from Yorkville Advisors, a single strategy hedge fund in New Jersey. She started her career at J.P. Morgan Asset Management. Ms. Bachner holds a Bachelor of Science in Business Administration with an emphasis in Finance and Accounting from Marist College. She is FINRA Series 7 and 63 registered. Ms. Bachner co-heads the LA Chapter of WIRE.

PRE-EVENT NETWORKING COCKTAIL

Monday, April 3rd

5:30pm – 8:30pm PST

Location: The Bungalow (Fairmont Miramar)

Sponsored By:



AGENDA OUTLINE

8:00 AM PST

Registration & Breakfast Networking

Sponsored by:



9:00 AM PST

Opening Remarks

Roy Salsinha, President, CEO, Carmo Companies

9:00 AM PST

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.

Moderator:

Lindsay Bachner, Managing Director, Evercore

Panelists:

JR Pearce, Investment Officer, Sacramento County Employees' Retirement System

Thomas Hester, Managing Director, StepStone

Henry Wilson, Chairman, Wayne County Employers Retirement System

10:00 AM PST

AM Networking Break

Sponsored By:



AGENDA OUTLINE

11:00 AM PST

Opportunistic Strategies

Leading real estate investment firms with an opportunistic approach discuss their fund and direct/co-investment opportunities across the US. All asset classes to be covered.

Moderator:

Jonathan Bren, Founder, **Bren Ventures**

Panelists:

Matthew Karp, President, **Amstar**

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

Jonathan Epstein, Managing Partner, **BentallGreenOak**

Martin Slusser, Founder and Managing Partner, **Magellan Value Partners**

12:00 PM PST

Value-Add Strategies

Leading real estate investment firms that focus on value-add opportunities discuss their fund and direct/co-investment opportunities across the US. All asset classes to be covered. What are current strategies that focus on dislocation and distress?

Moderator:

Ricardo Outi, Founder and Managing Partner, **AIC Capital**

Panelists:

Lino Campanile, President and Chief Financial Officer, **Westlake Realty Group/ Frontera West**

Andy Boyum, COO, **Darwin Homes**

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

Fareed Kanani, Principal, **Greenbridge Investment Partners**

AGENDA OUTLINE

1:00 PM PST

Networking Luncheon

Sponsored by:



2:30 PM PST

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:

Lei Farrand, Director, **March Capital Management**

Panelists:

Andrew Kaminski, Vice President, **Cliffwater**

William DeMar, Senior Director, **Choreo**

Dr. Joseph Julian, Managing Director, **Highmore**

3:15 PM PST

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:

Sean Davatgar, Chairman & CIO, **Dava Capital**

Panelists:

Brett Katz, Managing Director- West Coast Originations, **Mack Real Estate Credit Strategies**

Robin Potts, Partner and Chief Investment Officer of CPRE, **Canyon Partners**



AGENDA OUTLINE

3:45 PM PST

Family Office Outlook

West coast and internationally based single family offices and multi family 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:

Seth Wolkov, Founder & CEO, Evermore Partners

Panelists:

Chris Dzurinko, CIO, Lightning Tree Capital

Michael Ashley Schulman, Partner & Chief Investment Officer, Running Point Capital Advisors

Greg Alpert, Partner, Alpert Investments

Douglas W. Manchester, President, Manchester Texas Financial Group

4:45 PM PST

Cocktail Reception

Sponsored by:



6:00 PM PST

End of Conference



PARTICIPATION OPTIONS



PARTICIPATION OPTIONS

COMPLEMENTARY

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: \$2,000 USD **Ends February 24th**

Pre-Registration: \$2,500 USD **Ends March 24th**

Standard: \$3,000 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

\$15,000 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.
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\$20,000 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.
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\$30,000 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

\$70,000 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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THANK YOU

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