



2024 RFK Compass Summer Investors Conference Conference Agenda

The Kennedy Compound & Chatham Bars Inn, MA
Monday, June 10 - Thursday, June 13, 2024
(departures on the 13th)

MONDAY, JUNE 10

South Lawn, Chatham Bars Inn

1:00 PM

Conference Registration Opens

Registration opens at the Chatham Bars Inn for check-in and badge pick-up. This is an invite-only event. Registration is required prior to arriving at the event.

1:45 PM

LP Afternoon Networking - Invitation Only

Logistics shared with invited attendees via email

3:00 PM

Opening Remarks

Fanta NGom, Director, Business and Human Rights, Robert F. Kennedy Human Rights

3:10 PM

State of the Private Markets

James Diossa, Treasurer, State of Rhode Island

Daniel Gottlieb, Chief Investment Officer, Southern Ute Indian Tribe

Trey Hart, Managing Director, Private Equity Group, 50 South Capital

Sean Ward, Senior Managing Director, Blue Owl Capital

Moderator: David Braham, Executive Director, Institutional Investor

3:55 PM

What's Next in Private Credit

Ashley Baum, Managing Director, Head of Special Opportunities, Teacher Retirement System of Texas

Gregory Galligan, Senior Managing Director, Vista Credit Partners

Karen Rode, Senior Partner, Private Investments and Infrastructure Group Lead, Aon Hewitt Investment Consulting

Moderator: Melissa Santaniello, Managing Director, Hedge Funds and Private Credit, StepStone

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Conference Agenda - Monday, June 10

4:35 PM

Strategies for LP Capital Allocation to Emerging Managers

Taffi Ayodele, Director of Emerging and Diverse Manager Strategy, Office of the New York City Comptroller

Elizabeth Browne, Managing Director, Sponsor Solutions Group, Elevate, GCM Grosvenor

Chrissie Pariso, Managing Director, MPowered Capital

Pamela Pavkov, Managing Partner and Head, TPG NEXT

Demetrius Sidberry, Managing Director, Investments, New Catalyst Strategic Partners

Moderator: **Sancia Dalley**, Managing Director, DEI Investment Portfolio, PGIM/Prudential

5:15 PM

Interactive Workshop on Human Rights Risks For Investors

Facilitated by **Michael Posner**, Professor of Business and Society and Director, Center for Business and Human Rights, NYU Stern School of Business

6:30 PM

Day One Wrap-Up

Fanta NGom, Director, Business and Human Rights, Robert F. Kennedy Human Rights

6:30 PM

Cocktail Networking Reception

Clafin Lawn, Chatham Bars Inn

Rain Location: South Lounge, Main Inn

7:30 PM

Welcome Dinner

South Lawn, Chatham Bars Inn

Seating is pre-assigned – RSVP required

Greeting Remarks

Frank Baker, Co-Founder and Managing Partner, Siris Capital; Board Chair, Robert F. Kennedy Human Rights; **Ted Kennedy, Jr.**, Co-Chair, Disability Equality Index; and **Marvin S. Rosen**, Shareholder, Greenberg Traurig; Chair, RFK Compass Investors Conference

Fireside Chat: A Window Into the Worlds of Afsaneh Beschloss and Anastasia Titarchuk

A conversation with **Afsaneh Mashayekhi Beschloss**, Founder and Chief Executive Officer of RockCreek and **Anastasia Titarchuk**, Chief Investment Officer and Deputy Comptroller of the New York State Common Retirement Fund. Interviewed by **Barry Volpert**, Co-Founder and Chief Executive Officer of Crestview.

9:00 PM

Dinner Concludes



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TUESDAY, JUNE 11

Morning Program | South Lawn, Chatham Bars Inn

7:30 AM

Networking Breakfast

Breakfast will be available inside the Conference tent on the South Lawn

8:30 AM

Welcome Remarks

Marvin S. Rosen, Shareholder, Greenberg Traurig; Chair, RFK
Compass Investors Conference

Frank Baker, Co-Founder and Managing Partner, Siris Capital; Board Chair,
Robert F. Kennedy Human Rights

8:35 AM

In Focus | LP Perspectives on Risks and Opportunities

Introductions by **Jason Lamin**, Founder and Chief Executive Officer, Lenox
Park Solutions

Part I: Private Equity's Role in Economic Resilience

Michael W. Frerichs, Treasurer, State of Illinois

Brad Lander, Comptroller, City of New York

Moderator: Georgia Levenson Keohane, Chief Executive Officer, Soros
Economic Development Fund

Part II: Baby Bonds, the Racial Wealth Gap, and Inclusive Economics

Darrick Hamilton, Henry Cohen Professor of Economics and Urban Policy
and Founding Director of the Institute on Race, Power and Political Economy,
The New School

Erick Russell, Treasurer, State of Connecticut

Moderator: Frank Baker, Co-Founder and Managing Partner, Siris Capital;
Board Chair, Robert F. Kennedy Human Rights

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Conference Agenda - Tuesday, June 11

- 9:55 AM** **Spotlight | Patient Impact: “Walking the Walk” in Health Care Investing**
Presentation by **Dr. Kelvin A. Baggett**, Managing Director, Head of Patient Impact and Chair of the EMPIRIC Institute, Patient Square Capital. Introduced by **Adam Fliss**, Founding Partner and General Counsel, Patient Square Capital
- 10:25 AM** **Networking Break**
- 10:45 AM** **Seeking Growth and Resilience in Volatile Markets**
Andrew Fohrer, Partner, The Riverside Company
Seth H. Hollander, Partner, Kohlberg & Co
Stefan Kaluzny, Founder and Managing Director, Sycamore Partners
Ricardo Rodriguez, Managing Director, Grain Management
Moderator: David Son, Managing Director, Infrastructure Specialist, CBRE Investment Management
- 11:30 AM** **Global Investment Strategies and Regulatory Trends in Private Markets**
Francisco Alvarez-Demalde, Co-Founder and Managing Partner, Riverwood Capital
Tom Burger, Co-Founder and Managing Partner, Gridiron Capital
Jarrold Fong, Managing Director, Private Equity, JP Morgan
Susanne Forsingdal, Managing Director, Head of the Americas, Allianz Capital Partners
Moderator: Whitney W. Rauschenbach, Executive Director, Head of Private Company and Issuer Relations, MSCI
- 12:15 PM** **Deep Dive | Private Equity Value Creation**
Aron Betru, Chief Strategic Officer and Chief Operating Officer, Trident
Yue Bonnet, Senior Managing Director and Head of Investments, Ariel Alternatives
Aaron Maeng, Managing Director, American Securities
Bharath Srikrishnan, Managing Partner, BharCap Partners
Moderator: Alex Abell, Managing Partner, RCP Advisors
- 12:55 PM *Transition to Lunch – seating is not assigned.*
- 1:30 PM** **Lunch Fireside Chat | Transformational Value Creation as A Lever for Growth**
A conversation with **Rene Stewart**, Senior Managing Director, Co-Head of Endeavor Fund, Vista Equity Partners and **Michelle Davidson**, Partner, Co-Head Advisory Americas, Aksia.

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3:00 PM *Shuttles will depart from the Shore Road cul-de-sac in front of the Main Inn to take all guests to the Kennedy Compound for the afternoon programming and dinner*

TUESDAY, JUNE 11

Afternoon Program | The Kennedy Compound

4:00 PM **Kennedy Compound Welcome**
Join the Kennedy Family for a happy hour and a tour of the historic Kennedy Compound, graciously hosted by Ted Kennedy, Jr. and his wife, Kiki Kennedy.

4:30 PM **Remarks by Ted Kennedy, Jr. and Tour of Kennedy Compound Begins**

5:30 PM **Welcome Dinner and Featured Fireside Chat - Seating is pre-assigned.**

5:45 PM **President's Remarks**
Kerry Kennedy, President, Robert F. Kennedy Human Rights

6:30 PM **Keynote Fireside Chat | From Inequality to a Just Future: Treasurer Picciak's Leadership and Vision for Vermont**
A conversation with **Frank Baker**, Co-Founder and Managing Partner, Siris Capital; Board Chair, Robert F. Kennedy Human Rights, and **Mike Picciak**, Vermont State Treasurer.

8:00 PM *Dinner Concludes – Shuttles leave for Chatham Bars Inn*

9:00 PM **After-Dinner Party | Sponsored by Vista Equity Partners**
After-dinner cocktails and snacks generously hosted by **Vista Equity Partners** at the South Lounge at Chatham Bars Inn. Shuttles will be available for attendees staying at Wayside Inn.





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WEDNESDAY, JUNE 12

South Lawn, Chatham Bars Inn

- 7:45 AM** **Emerging Manager Breakfast - Invite Only**
Logistics shared with invited attendees via email
- 8:00 AM** **Networking Breakfast**
Breakfast will be available inside the Conference tent on the South Lawn
- 8:55 AM** **Opening Remarks**
Fanta NGom, Director, Business and Human Rights, Robert F. Kennedy Human Rights
- 9:00 AM** **Dispelling Myths: The Secondaries Market**
Michael Elio, Partner, Private Equity, StepStone Partners
Matt Jones, Co-Managing Partner, North American and European Secondaries, TPG
Jon Popielarski, Managing Partner and Co-Founder, Ballast Equity Partners
Moderator: J. David Enriquez, Partner, Clipway
- 9:40 AM** **Private Market Investments Towards a Sustainable Climate Transition**
Tom DiNapoli, Comptroller, State of New York
Nazar Massouh, Chief Executive Officer, Co-Founder and Co-Managing Partner, OIC
Katarina Staaf, Chief Executive Officer, AP6
Morten Welo, Partner & Chief Operating Officer, and Head of Investor Relations, FSN Capital
Moderator: Robert Schultz, Partner, Capricorn Investment Group
- 10:20 AM** **Networking Break**

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Conference Agenda - Wednesday, June 12

- 10:40 AM** **Navigating AI Risks and Opportunities**
Mike Kubzansky, Chief Executive Officer, Omidyar Network
Parasvil Patel, Partner, Radical Ventures
Scott Pittman, Senior Vice President and Chief Investment Officer, Mount Sinai Health System
Kate Simpson, Partner, TrueBridge Capital Partners
Moderator: Shu Dar Yao, Founder and Managing Partner, Lucid Capitalism
- 11:30 AM** **Interactive Session with Limited Partners**
A unique networking opportunity featuring three 20-minute sessions led by LPs. Engage in insightful group discussions, get your questions answered directly by LP table captains, and rotate tables to meet new LP leaders. This event is designed to create connections and deepen your understanding of various programs and future outlooks.
- 12:30 PM** **Networking Lunch** – *seating is not assigned.*
- 1:30 PM** **Spotlight Presentation | Beyond Asset Classes: The Future of Institutional Investment with Capital Design**
Jordan Ostapchuk, Founder, Capital Design; Partner, Fuse Strategy
- 1:50 PM** **Crafting Competitive Portfolios in Today’s Private Market Landscape**
Brett Ashley Barth, Founding Partner, Capital Creek Partners
Andrew DiGeronimo, Partner, LGT Capital Partners
Moderator: Donald Carey, Jr., Managing Director, Capital Formation and Investor Relations, Grain Management
- 2:20 PM** **Outlook for Private Markets in 2025**
Ryan Bailey, Chief Investment Officer and Managing Partner, Paradigm Institutional Investors
Tim Berkowitz, Managing Partner and Founder, InnovaHealth Partners
Jeremy Heer, Managing Director, University of Illinois Foundation
Anuj A. Shah, Managing Director, Head of ESG and Impact Advisory, Stax Consulting
Moderator: Mina Pacheco Nazemi, Managing Director, Head, Diversified Alternative Equity, Barings
- 3:10 PM** **Conference Wrap-Up**
Fanta NGom, Director, Business and Human Rights, Robert F. Kennedy Human Rights

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3:15 PM **Social Activity and Networking**
Beach bonfire, snacks, drinks, and games

6:00 PM **Networking Dinner**
Casual networking, dinner, and karaoke

9:00 PM **Conference Concludes**
Shuttles will depart from Chatham Bars Inn to return guests staying at Chatham Wayside Inn

THURSDAY, JUNE 13

8 - 10 AM *A continental breakfast will be available inside the Boat House on Thursday, June 13 at 8 AM.*