

ROBERT F. KENNEDY HUMAN RIGHTS COMPASS

CONFERENCE SPEAKERS

MONDAY, JUNE 24, 2019

1:00 PM



WELCOME REMARKS

Kerry Kennedy, President, Robert F. Kennedy Human Rights

Kerry Kennedy is the president of Robert F. Kennedy Human Rights. She is the author of New York Times best-seller, *Being Catholic Now* (Random House 2005), *Speak Truth to Power* (Random House 2000) and *Robert F. Kennedy; Ripples of Hope* (Hachette 2018).

For more than thirty years, Kennedy has devoted herself to the pursuit of equal justice, the promotion and protection of basic rights, and the preservation of the rule of law. She has worked on a range of issues, including children's rights, child labor, disappearances, indigenous land rights, judicial independence, freedom of expression, ethnic violence, impunity, and the environment. She has concentrated specifically on women's rights, exposing injustices and educating audiences about women's issues, particularly honor killings, sexual slavery, domestic violence, workplace discrimination, sexual assault, abuse of prisoners, and more. She has led hundreds of human rights delegations. At a time of diminished idealism and growing cynicism about public service, her life and lectures are testaments to the commitment to the basic values of human rights.

Under Kennedy's leadership, Robert F. Kennedy Human Rights partners with the bravest people on earth to create lasting change. Robert F. Kennedy Human Rights supports defenders in the field with advocacy, litigation, and training; brings human rights to students in the classroom with its innovative *Speak Truth To Power* curriculum; and engages the financial community about sustainable investing and the intersection between business and human rights.

Kennedy served as chair of the Amnesty International USA Leadership Council for over a decade. Nominated by President George W. Bush and confirmed by the Senate, she serves on the board of directors of the United States Institute of Peace, Human Rights First, the Kailash Setyarthi Children's Foundation, Laureate and Leaders, Nizami Ganjavi International Center (NGIC), Sustainable Development Goals–Africa, SDGUSA, and HealthEVillages, as well as RFKHR–UK, RFK HR–Italia and RFKHR–Suisse. She is on the advisory committee for the Association of American Indian Affairs, the Global Youth Action Network, the Albert Schweitzer Institute, Sankofa, San Patrignano, and the Center for Victims of Torture.

Kennedy received high honors from President Lech Walesa of Poland for aiding the Solidarity movement, The Humanitarian award from the Congress of Nobel Peace

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PANEL: THE OPPORTUNITY COST OF INCARCERATION – A DISCUSSION WITH INVESTORS, POLICY MAKERS AND ACTIVISTS

MODERATOR: Michael Schreiber, Chief Operations Officer, Robert F. Kennedy Human Rights

Michael Schreiber is an experienced leader of mission driven organizations, with a particular interest and capacity in organizational growth and strategic implementation. Over his 20 year career, Schreiber has served in leadership roles for Deloitte Consulting, United Way Worldwide, GBCHealth and Concern Worldwide. In each of these engagements, he has been responsible for identifying new relationships, building robust processes, formalizing new strategies, and ensuring staff development approaches to unlock additional organizational value.

In addition, Schreiber is a recognized expert in the intersection of commercial activity and social outcome creation. He is highly visible in his volunteer roles, serving as the chair of the Net Impact board and a member of the Atlas Corps board of directors. Schreiber's previous board service includes both the ePhilanthropy Foundation and N-TEN, the leading nonprofit technology trade association. Schreiber has a BA in economics & international relations from Stanford University and an MBA from Duke's Fuqua School of Business. When not working, he enjoys urban gardening with his two sons at their Hoboken home and traveling to wine regions with his wife and extended family.



Peter Kadens, Chief Executive Officer, Kaden Holdings Group and Chairman, Kadens Family Foundation

Pete Kadens currently serves as the chairman of the Kadens Family Foundation, a charitable organization dedicated to closing the pervasive wealth and education gaps in the U.S. He retired in August 2018 as CEO of Green Thumb Industries, one of the largest publicly-traded, legal cannabis operators in the U.S. with a current market capitalization of over \$3 billion. Prior to Green Thumb Industries, in 2008 Kadens started one of the largest commercial solar companies in the U.S., SoCore Energy. Under his leadership, SoCore expanded operations into 17 states and was named one of Chicago's most innovative businesses by Chicago Innovation Awards. In 2013, he sold SoCore Energy to Edison International, a Fortune 500 energy holding company. Kadens is one of 25 cannabis industry executives serving on the board of directors of the Cannabis Trade Federation, the nation's leading organization focused solely on federal marijuana policy reform. He was also named one of the 20 People to Watch in the Cannabis Industry in 2018 by Marijuana Business Daily.

Kadens believes deeply in, and actively leads, organizations that seek to transform lives and strengthen communities, serving as chairman of StreetWise (2009–2018), one of the largest homeless aid organizations in Chicago. He currently serves as chairman emeritus at StreetWise and sits on several other boards in the nonprofit and for-profit space. Kadens was awarded the Trailblazer Chicago Award by The Cara Program in 2019, The Catalyst Man of the Year by Streetwise in 2015, the Distinguished Alumnus for Citizenship in 2010 by his college alma mater, Bucknell University, where he earned his bachelor's of arts in political science, and a

Distinguished Alumnus by his high school, Ottawa Hills High School in Toledo, Ohio in 2019. He was also named one of the 40 Under 40 by Crain's Chicago Business in 2012. Kadens is a 2019 Henry Crown Fellow of the Aspen Institute.



Insha Rahman, Director, Strategy & New Initiatives, Vera Institute of Justice

Insha Rahman helps incubate new work in the areas of prosecutorial reform, bail, and decarceration, with a focus on developing advocacy-related strategies and accountability. Having practiced as a public defender before coming to Vera, she is a nationally-recognized expert on bail and has developed bail legislation and policies, including recently passed reforms in New York State, and provided technical assistance and training to advocates, judges, defense attorneys, and prosecutors on bail reform, pretrial justice, and reducing jail incarceration.

From 2016-2017, Rahman served as staff to the Independent Commission on New York City Criminal Justice & Incarceration Reform, a blue-ribbon commission chaired by former Chief Justice Jonathan Lippman of the New York State Court of Appeals that developed a blueprint to close Rikers Island. She has been quoted as an expert on bail in TheNation, City and State, New York Times, NPR, and PBS, among other outlets. Prior to Vera, Rahman was a public defender at The Bronx Defenders. She earned her JD from the City University of New York School of Law and her BA in Africana studies from Vassar College. She currently serves on the boards of the New York Civil Liberties Union, Brooklyn Community Bail Fund, and the New York State Appellate Division's Indigent Defense Organization Oversight Committee.



Monica Smith, Program Officer, Criminal Justice, Robert F. Kennedy Human Rights

Monica Smith joins Robert F. Kennedy Human Rights as a criminal justice program officer having over a decade of experience in criminal law. She works on nationwide criminal justice reform efforts focused on ending pre-trial detention and mass incarceration. In her previous role as director of the Miller Center for Special Mitigation at Friends of Island Academy, Smith partnered with Robert F. Kennedy Human Rights to minimize the length of stay on Riker's Island for one of society's most vulnerable groups – children. Prior to moving to New York, she practiced in Louisiana as an attorney for individuals facing civil commitment and children in delinquency and child in need of care matters statewide. Smith began her career as a public defender in Kentucky. She earned her BA in political science from Xavier University of Louisiana and a JD from Southern University Law Center. She is licensed to practice law in Kentucky and Louisiana.

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**SPOTLIGHT TALK: IMPACT INVESTING IN PUBLIC MARKETS:
FACT OR FICTION – HERMES IMPACT OPPORTUNITIES PORTFOLIO**

MODERATOR: Daniel Ingram, Vice President, Responsible Investing Consulting, Wilshire Associates



Daniel Ingram helps institutional asset owners protect and enhance long-term capital by integrating environmental, social and governance (ESG) risks and opportunities into investment decisions. Ingram runs educational workshops, he designs policies and guidelines, sources best-in-class investment strategies and conducts portfolio analysis to measure impact outcomes. Prior to joining Wilshire in 2017, Ingram worked in-house as the head of responsible investment for the BT Pension Scheme, the UK's largest corporate defined benefit plan. Previously, he worked at Hermes Investment Management as a senior corporate governance analyst and as a policy analyst at Her



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Majesty's Treasury on a number of high-profile reviews including the Stern Review of the Economics of Climate Change. Ingram earned an MA from Trinity College Dublin in Ireland in philosophy and political science. He holds a post-graduate certificate in sustainable leadership from the University of Cambridge and the UK CFA Institute's Investment Management Certificate.

Tim Crockford, Head of Impact Investing, Hermes Investment Management

Tim Crockford joined Hermes in 2009 as a research analyst for the European Equities team covering the resources, oil & gas, agricultural chemicals, capital goods and the technology sector. He became lead portfolio manager of the Hermes Europe ex-UK Equity Fund in 2015 and joined Andrew Parry in forming the impact team in August 2016, which launched the Hermes Impact Opportunities Fund in December 2017, which Crockford also manages. Prior to joining Hermes, Crockford worked at Execution Limited from July 2006 as a primary research analyst working on major projects in the consumer, retail and financial services sectors, and then joined Sourcecap as an analyst in May 2008. Crockford was raised and educated in Malta and graduated from the University of Malta in 2006 with a bachelor of accountancy (Hons) degree, as well as a bachelor of commerce degree. In 2016, he featured in Financial News's 40 Under 40 Rising Stars of Asset Management, an editorial selection of the brightest up-and-coming men and women in the industry.

PANEL: RESPONSIBLE INVESTING THROUGH THE YEARS – PROGRESS AND TRENDS FOR THE FUTURE

MODERATOR: Frode Strand-Nielsen, Managing Partner, FSN Capital

Frode Strand-Nielsen has entrepreneurial, strategy and M&A experience from Arkwright and Bain & Co. Prior to founding FSN Capital in 1999, he was a founding director and the chairman of the executive committee of Arkwright. Arkwright is a corporate advisory firm specialising in strategy consulting and M&A work. The firm had 120 professionals located in five offices; London, Paris, Hamburg, Stockholm and Oslo. Before Arkwright, Strand-Nielsen was a manager with Bain & Co, London. He holds a BA (Hons) from Simon Fraser University, Vancouver, BC, and an MBA from the Harvard Business School. In 1978, he was named scholar athlete of the year by the North American Intercollegiate Association.

Adam Blumenthal, Managing Partner, Blue Wolf Capital Partners

Adam Blumenthal was the founding partner of Blue Wolf in 2005. He has served on the board of directors of numerous middle market companies over the course of three decades. Currently, he serves on the board of directors of Finch Paper Company LLC, Twin Rivers Paper Company, Elara Caring, StateServ Holdings, LLC, and Fox Rehabilitation. From 2011 through 2017, Blumenthal was a trustee, and chair of the investment committee of the UAW Retiree Medical Benefits Trust, a \$60 billion fund that pays retiree health benefits for over 700,000 UAW employees of Ford, Chrysler and General Motors. Blumenthal served as first deputy comptroller and chief financial officer for New York City Comptroller William C. Thompson, Jr. from 2002 to 2005. In this capacity, he oversaw the capital markets activities of the Comptroller's office, including overseeing the City's debt issuance, managed the assets of the New York City Retirement Systems, and issued budget, financial, and economic analyses. During Blumenthal's tenure, the City's pension assets increased from \$65 billion to \$85 billion, primarily as a result of strong investment gains. Blumenthal received a BA, magna cum laude from Harvard College, and an MBA from the Yale School of Management (SOM). From 2004 to 2007, he served on the Yale SOM's Board of Advisors, and is currently a member of the advisory board for Yale's International Center for Finance.

In 2009, he was named a Donaldson Fellow at the Yale SOM. Blumenthal has been a trustee of, and chairman of the investment committee of the Nathan Cummings Foundation and the Community Service Society of New York.



Andrew Collins, Director of ESG Investing, San Francisco Employees' Retirement System

Andrew Collins is director of ESG investing for the San Francisco Employees' Retirement System (SFERS). Previously, Collins was an ESG investment strategist with State Street Global Advisors, and prior to that he was technical director of standards setting at the Sustainability Accounting Standards Board (SASB). He has also held roles in environmental auditing and consulting, and worked as a corporate sustainability manager for the Indian conglomerate Mahindra & Mahindra. Collins holds a BS from Yale University.



Ted Eliopoulos, Vice Chairman and Head of Strategic Partnerships, Morgan Stanley Investment Management

Ted Eliopoulos is the vice chairman and head of strategic partnerships at Morgan Stanley Investment Management. He is also a member of the investment management operating committee and co-chair of the Sustainable Investing Council. Before joining Morgan Stanley in 2018, Eliopoulos served as the chief investment officer at California Public Employees' Retirement System (CalPERS). From 2007 to 2014, he held various leadership roles at CalPERS including interim chief investment officer and senior investment officer of real estate and real assets. From 2002 to 2006, he served as the chief deputy treasurer and deputy treasurer at the California State Treasurer's Office.

Eliopoulos has also held positions in both the private and public sectors, including real estate development and in environmental management with the U.S. Department of Energy. He began his career at Latham & Watkins as an attorney in the real estate division. Eliopoulos's past board affiliations include the U.S. Real Estate Roundtable, the Pension Real Estate Association, and the Sustainability Accounting Standards Board's Investor Advisory Group. He also serves on the Alliance for Southern California Innovation's Advisory Council. He received a bachelor's degree, magna cum laude, with honors, in comparative literature from Dartmouth College and holds a JD from the University of Virginia.



Steve Ellis, Co-Managing Partner, The Rise Fund and Head of Business Building, TPG Growth

Steve Ellis is a managing partner with TPG Growth and The Rise Fund. TPG Growth is the \$13B growth equity and middle market buyout platform of global alternative asset firm TPG. In 2016, Ellis was among a group of partners who led the formation of the The Rise Fund, a global impact investing fund with \$2.1 billion under management.

Prior to joining TPG, Ellis served as CEO of Asurion, the world's leading provider of technology protection services, with over \$6B in revenue and 16,000 employees. Before joining Asurion, Ellis served as CEO of Bain & Company from 2005 to 2012. Prior to becoming CEO, he was the managing partner for Bain's West Coast offices and played several key leadership roles in the global TMT and private equity practices. Ellis joined Bain in 1993 from a Silicon Valley technology consulting firm he co-founded in 1989.

He serves on the boards of The Charles Schwab Corporation, Affinity, InStride, The Bridgespan Group, Dreambox Learning, e.l.f. Cosmetics, EverFi, Evolution Media, Renaissance Rx, Z Global. Ellis received a BA with honors in economics and history



from the University of California at Berkeley where he was an All-American on the National Championship Rugby team. He earned an MBA from the Stanford Graduate School of Business, where he is a regular guest lecturer.

Kate Murtagh, Managing Director and Chief Compliance Officer, Harvard Management Company

Kate Murtagh is the managing director for sustainable investing and the chief compliance officer of Harvard Management Company, Inc. (HMC). Murtagh joined HMC in 2006. As managing director for sustainable investing, she is responsible for designing and implementing HMC's sustainable investing program across all asset classes. Murtagh developed HMC's first sustainable investing policy and worked closely with Harvard University in its decision to become the first U.S. endowment signatory to the United Nations-supported Principles for Responsible Investment.

Murtagh was named a 2017 Leader in the Law by Massachusetts Lawyers Weekly for her innovative work in sustainable investing. As chief compliance officer, Murtagh is responsible for regulatory and legal matters relating to HMC's investment activities. In this capacity, Murtagh has extensive expertise in the structuring and implementation of various investment strategies including commingled funds, separately managed accounts, joint ventures, private REITS, and direct asset ownership. Prior to joining HMC, Murtagh was a partner in the business law department of Goodwin Procter, a national law firm based in Boston, MA. Murtagh earned a BS in management from Rensselaer Polytechnic Institute and a JD from Cornell Law School, where she served as managing editor of the Cornell Law Review.



Fanglu Wang, Senior Managing Director, CITIC Capital and Managing Partner, CITIC Capital Silk Road Fund

Fanglu Wang is the senior managing director and CIO of CITIC Kazyna Investment Fund I. He has over 25 years of experience in capital markets, corporate finance, financial engineering and risk management. He has led several major capital raising transactions for the China Ministry of Finance and other major corporations. Wang was the former head of product marketing and sales for China at HSBC, a director in investment banking and debt capital markets at Merrill Lynch Asia, a vice president at Citibank Hong Kong and an executive director at Sakura Global Capital. Wang received an MA in statistics from the University of Chicago, a BSc in mathematics and a BA in journalism from Fudan University in Shanghai.

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IN CONVERSATION WITH GOVERNMENT PENSION INVESTMENT FUND OF JAPAN

MODERATOR: Amanda White, Editor, Top1000funds.com



Amanda White is responsible for the content across all Conexis Financial's institutional media and events. She is responsible for directing the bi-annual Fiduciary Investors Symposium which challenges global investors on investment best practice and aims to place the responsibilities of investors in wider societal, and political contexts, as well as promote the long-term stability of markets and sustainable retirement incomes. She is the editor of Top1000funds.com, the online news and analysis site for the world's largest institutional investors.

White has been an investment journalist for more than 20 years and has edited industry journals including Investment & Technology, Investor Weekly and

MasterFunds Quarterly. She was previously editorial director of InvestorInfo and has worked as a freelance journalist for the Australian Financial Review, CFO, Asset and Asia Asset Management. She has a bachelor of economics from Sydney University and a master of arts in journalism from the University of Technology, Sydney. She was previously a columnist for the Canadian publication, Corporate Knights, which is distributed by the Globe and Mail and The Washington Post. White is currently a fellow in the Finance Leaders Fellowship at the Aspen Institute. The two-year program consists of 22 fellows and seeks to develop the next generation of responsible, community-spirited leaders in the global finance industry.



Norihiro Takahashi, President, Government Pension Investment Fund of Japan

Norihiro Takahashi has been the president of the Government Pension Investment Fund (GPIF) since April 2016. Prior to his role at GPIF, he was representative director and president of JA Mitsui Leasing, Ltd. From 1980 to 2015, Takahashi was senior managing director at The Norinchukin Bank, where he held various leadership positions in the areas of investment and management including general manager of Credit & Alternative Investment Division, general manager of Fixed Income Investment Division, deputy general manager of Corporate Planning Division and deputy general manager of Financial Planning & Control Division. He also served as general manager at Nagasaki Branch of the Bank. He received his BA in law from the University of Tokyo.

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SPOTLIGHT TALK: BLACKROCK'S SUSTAINABLE INVESTING APPROACH

MODERATOR: Michael Posner, Co-Director and Professor of Business and Society, Center for Business and Human Rights, New York University Stern School of Business



Michael Posner is the Jerome Kohlberg professor of ethics and finance at NYU Stern School of Business and director of the Center for Business and Human Rights. Posner served in the Obama administration from September 2009 until March 2013, as the Assistant Secretary of State for Democracy, Human Rights and Labor. Prior to that Posner was the longtime executive director and president of Human Rights First, a U.S.-based human rights advocacy organization. He was also a visiting lecturer at Yale and Columbia law schools. Posner has played a major role in shaping U.S. policy from inside and outside of government on issues ranging from refugee and asylum law and policy, to national security and human rights, to Internet freedom, and most recently on a range of business and human rights issues. He chairs the board of the Fair Labor Association, which addresses supply chain labor issues in the apparel, athletic footwear and agriculture sectors.

Brian Deese, Managing Partner, BlackRock



Brian Deese is the managing director and the global head of sustainable investing at BlackRock. The sustainable investing team is focused on identifying drivers of long-term return associated with environmental, social and governance issues, integrating them throughout Blackrock's investment processes, and creating solutions for our clients to achieve sustainable investment return. Previously, Deese worked in the White House under President Obama where he was the president's senior advisor for climate and energy policy, helping to negotiate the Paris Climate Agreement and

other national and international initiatives. Early on in the Obama administration, Deese was one of the key architects in the resurgence of the auto industry after the financial crisis. He also served as deputy director of the National Economic Council and deputy director of the Office of Management and Budget. Most recently, he has been providing advice to institutions interested in sustainable investing strategies and lecturing at the Kennedy School of Government at Harvard University. Deese earned a JD from Yale Law School and a BA from Middlebury College. He lives in Brookline, Massachusetts.

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LIMITED PARTNER WORKSHOP

FACILITATOR: Michael Posner, Co-Director and Professor of Business and Society, Center for Business and Human Rights, New York University Stern School of Business

ROBERT F. KENNEDY HUMAN RIGHTS COMPASS

DINNER SPEAKERS

MONDAY, JUNE 24, 2019

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WELCOME DINNER

REMARKS: Kerry Kennedy, President, Robert F. Kennedy Human Rights

Kerry Kennedy is the president of Robert F. Kennedy Human Rights. She is the author of New York Times best-seller, *Being Catholic Now* (Random House 2005), *Speak Truth to Power* (Random House 2000) and *Robert F. Kennedy; Ripples of Hope* (Hachette 2018).

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Prize Laureates, and many other honors. Kennedy has served in numerous political campaigns, and she is a member of the Massachusetts and District of Columbia bars. She is a graduate of Brown University and Boston College Law School, and she holds honorary doctorates of law from Le Moyne College, University of San Francisco Law School, and University of New Caledonia, and honorary doctorates of Humane Letters from Bay Path College and the Albany College of Pharmacy. Kennedy is the mother of three daughters, Cara, Mariah, and Michaela.

FIRESIDE CHAT: DISABILITY INCLUSION IN ESG MEASUREMENT – THE ROLE FOR INVESTORS

Marvin Rosen, Shareholder, Greenberg Traurig

Marvin Rosen is a senior partner at the international law firm of Greenberg Traurig, LLC. Rosen co-founded Fusion Telecommunications International, Inc. in 1997 and currently serves as the chairman of Fusion Telecommunications International, Inc. He was the director of Terremark Worldwide Inc. from April 2000 until it was sold to Verizon in 2011. He presently serves as a director on the board of Nikko Asset Management Americas, Inc. Rosen has been a board member of Robert F. Kennedy Human Rights since 1995. He currently serves as a board member of the Howard Gilman Foundation and Roundabout Theatre Group. He served as budget and finance chairman for the Summit of the Americas and chairman of the Florida Housing Finance Agency. Rosen served as Finance chairman for the Democratic National Committee from September 1995 to January 1997.

MODERATOR: Edward "Ted" Kennedy, Jr., Disability Equality Index

Ted Kennedy, Jr., is a member of Epstein Becker Green's Health Care and Life Sciences practice. As a leading health care regulatory attorney for over 20 years, Kennedy counsels health care clients on the critical legal and reimbursement policy issues and changes facing hospitals, post-acute providers, government and commercial insurance entities, and life sciences companies. Prior to joining Epstein Becker Green, Kennedy was co-founder and president of the Marwood Group, a health care-focused strategic advisory and financial services firm. Under Kennedy's leadership, the Marwood Group advised hundreds of the nation's foremost health care companies, institutional investors, and trade associations. He previously practiced law at a New Haven, Connecticut law firm and was the director of legal and regulatory affairs at the Connecticut Hospital Association. Kennedy has also served on the corporate boards of many of the country's most innovative health care organizations, including Press Ganey Associates, Genoa Healthcare, InnovAge, MedPower, and Arvinas.

A pediatric bone cancer survivor and amputee, Kennedy has been an active leader in the movement to expand opportunities for persons with disabilities. In June 2017, Kennedy was elected chair of the board of the American Association of People with Disabilities (AAPD), one of the country's preeminent civil rights and public policy organizations dedicated to social reform and equal rights for people with disabilities. He also advises employers on best practices and compliance with the Americans with Disabilities Act (ADA). One of AAPD's signature programs is the Disability Equality Index (DEI), now the nation's leading corporate benchmarking tool for disability equality and inclusion. The DEI scores and tracks businesses on their disability employment, accommodation policies and socially responsible corporate practices.

From 2015 to 2019, Kennedy served as a state senator in the Connecticut General Assembly. During his four-year tenure as a legislator—including appointments as senate chair of the Environment Committee, Vice Chair of the Public Health Committee, and Deputy Majority Leader for the Democratic Caucus—he authored and led successful passage of over 70 new laws expanding environmental protection,

disability rights, home and community-based care, value-based purchasing, provider network reforms and price transparency, mental health parity implementation, and access to treatment for individuals with substance use disorders. Kennedy lectures worldwide on health care policy and disability law, and is a member of the Council on Foreign Relations. His writings have appeared in The Washington Post, The New York Times, USA Today, Newsweek, The Boston Globe, Hartford Courant, and numerous other publications.



Tom DiNapoli, 54th Comptroller, State of New York

Thomas P. DiNapoli is the 54th Comptroller of the State of New York known for his integrity, independence and even-keeled leadership. He was appointed State Comptroller on Feb. 7, 2007 by a bipartisan majority of the State Legislature and re-elected to full four-year terms in 2010, 2014 and 2018. DiNapoli is known for his integrity, independence and steadfast leadership. Since taking office, DiNapoli has aggressively fought the misuse of public resources, strengthened one of our nation's top public pension funds, and consistently spoken out against fiscal gimmicks, imprudent actions and government inefficiency.

A life-long Long Islander, DiNapoli was raised in a middle-class, union household and saw the value of hard work and stretching every dollar in the example set by his parents. In 1972, DiNapoli won his first election and served as a trustee on the Mineola Board of Education, becoming the first 18-year-old in New York State to hold public office. In 1986, he ran for the New York State Assembly and was elected to represent the 16th District in northwestern Nassau County for the next 20 years. He graduated magna cum laude with a bachelor's degree in history from Hofstra University and earned a master's degree from The New School University's Graduate School of Management and Urban Professions.



Michael Frerichs, Treasurer, State of Illinois

Michael Frerichs was elected Illinois State Treasurer in November 2014 becoming the 74th person to serve in this role. In Illinois, the treasurer is the state's chief investment officer and Frerichs is a certified public finance officer. The Office of the Treasurer actively manages approximately \$25 billion. The investment approach is cautious to ensure the preservation of principal. The investment returns are significant: for every \$1 spent to run the office, he nets \$28 for the state's residents. Since taking office, Frerichs has made significant strides in the fight for consumers by making sure Illinois residents get what is owed to them through the unclaimed property program. A record-breaking \$159 million in forgotten cash and stock was returned to individuals, employers, and nonprofits in Fiscal Year 2017.

By making changes to the Bright Start and Bright Directions college savings programs, he has lowered fees and provided more investment options, making college more affordable for families saving for their child's future. Under his leadership, Illinois now leads a multi-state alliance that allows parents of children with blindness or a disability to save for their child without jeopardizing their federal disability benefits. Achieving a Better Life Experience Program (ABLE) is the national standard, offering high-quality and low-cost investment options.

Frerichs was born in the Downstate farming community of Gifford, Illinois. He graduated from Yale University and spent two years in Taiwan where he taught English to young students and learned to speak Chinese. He returned to Champaign County and launched his own technology business. He was elected to the Champaign County Board and elected champaign county auditor. He also served as a volunteer firefighter. In 2006, he was elected Illinois state senator representing East Central Illinois. As chairman of the higher education committee, Frerichs championed efforts to make college more affordable. He also served as chairman of the agriculture and

conservation committee. Frerichs currently serves as vice chairman of the National Association of State Treasurer's Legislative Committee as well as trustee on the Illinois State Board of Investment. He lives in Champaign with his young daughter, Ella.



Tobias Read, Treasurer, State of Oregon

Tobias Read understands that financial empowerment, wise investments, and sound management are foundational to the quality of life and economic opportunities for Oregonians, and key for the long-term vitality of Oregon. Elected Oregon's 29th state treasurer in 2016, Read is a collaborative problem solver who draws upon his management, political, and finance policy experience to serve Oregonians as treasurer. Read worked in the U.S. Treasury and as a liaison between designers, engineers and manufacturing units for Nike Inc. In 2006, he was elected to the Oregon House of Representatives, where he served a decade and championed legislation to invest in public education, improve state financial management, finance critical infrastructure improvements, and to help Oregonians save for a more secure future.

Read was elected speaker pro tempore and earned the chairmanship of the House Committee on Transportation and Economic Development, and the House Committee on Higher Education, Innovation, and Workforce Development. He also served on the House Revenue Committee in multiple legislative sessions. Read was a member of the Joint Committee on Ways and Means, the primary budget writing body for the legislature. He pushed to strengthen the state's rainy day fund, which was a key factor that helped the state to earn a credit rating upgrade in 2011. He also helped lead the coalition that ultimately approved full-day kindergarten, underscoring that one of Oregon's best possible investments is in our kids. Read led efforts to promote infrastructure projects using innovative public-private partnerships, and was a chief sponsor of the Oregon Investment Act, which streamlined Lottery investments in promising Oregon startups.

In 2015, Read was a chief sponsor of the Oregon Retirement Savings Plan, which became the first operating state-sponsored retirement program in 2017. Known as OregonSaves, the program enrolls Oregon workers who lack access to a retirement savings option through their employers, and will allow hundreds of thousands more Oregonians to retire with dignity after a lifetime of work.



Shawn Wooden, Treasurer, State of Connecticut

Shawn T. Wooden was elected State Treasurer on November 6, 2018, following a successful 21-year career as an investment attorney specializing in public pension plans. Wooden was sworn-in as Connecticut's 83rd State Treasurer on January 9, 2019. Most recently, Treasurer Wooden was a partner in a major law firm where he led its public pension plan investment practice and was a member of the investment section of the National Association of Public Pension Attorneys. Early in his legal career, he worked in the AFL-CIO's Office of Investment in Washington, D.C. From 2011 to 2015, Treasurer Wooden served as president of the Hartford City Council. He also was a member of the Connecticut Citizen's Ethics Advisory Board, which interprets and enforces the state's ethics laws and oversees the Connecticut Office of State Ethics.

Treasurer Wooden's passion for public service began early in his life. He was born and raised in the north end of Hartford as the youngest of six children. From a young age, his parents taught him the importance of a good education, hard work and giving back to your community. As a child, Treasurer Wooden participated in a desegregation busing program and attended Manchester Public Schools, where he graduated high school with honors. He went on to earn a four-year academic scholarship to Trinity College in Hartford, where he now serves as a member of its board of trustees. Upon college graduation, Treasurer Wooden worked for the Mayor of Hartford and then

as Connecticut director of Project Vote, a national voter registration and education program. He also served as a key aide for the Connecticut Commissioner of Social Services. He later attended New York University School of Law before beginning his career at Day Pitney. Super Lawyers magazine designated him as a Connecticut Super Lawyer for Securities and Corporate Finance. Pensions and Investments named Treasurer Wooden one of the "Twenty-Five Investment Professionals to Watch." Savoy magazine named him as one of the most influential black lawyers in the country. Additionally, Treasurer Wooden is the proud father of two boys.

ROBERT F. KENNEDY HUMAN RIGHTS COMPASS

CONFERENCE SPEAKERS TUESDAY, JUNE 25, 2019

7:30 AM

OPENING REMARKS

Kerry Kennedy, President, Robert F. Kennedy Human Rights

Kerry Kennedy is the president of Robert F. Kennedy Human Rights. She is the author of New York Times best-seller, *Being Catholic Now* (Random House 2005), *Speak Truth to Power* (Random House 2000) and *Robert F. Kennedy: Ripples of Hope* (Hachette 2018).

For more than thirty years, Kennedy has devoted herself to the pursuit of equal justice, the promotion and protection of basic rights, and the preservation of the rule of law. She has worked on a range of issues, including children's rights, child labor, disappearances, indigenous land rights, judicial independence, freedom of expression, ethnic violence, impunity, and the environment. She has concentrated specifically on women's rights, exposing injustices and educating audiences about women's issues, particularly honor killings, sexual slavery, domestic violence, workplace discrimination, sexual assault, abuse of prisoners, and more. She has led hundreds of human rights delegations. At a time of diminished idealism and growing cynicism about public service, her life and lectures are testaments to the commitment to the basic values of human rights.

Under Kennedy's leadership, Robert F. Kennedy Human Rights partners with the bravest people on earth to create lasting change. Robert F. Kennedy Human Rights supports defenders in the field with advocacy, litigation, and training; brings human rights to students in the classroom with its innovative *Speak Truth To Power* curriculum; and engages the financial community about sustainable investing and the intersection between business and human rights.

Kennedy served as chair of the Amnesty International USA Leadership Council for over a decade. Nominated by President George W. Bush and confirmed by the Senate, she serves on the board of directors of the United States Institute of Peace, Human Rights First, the Kailash Setyarthi Children's Foundation, Laureate and Leaders, Nizami Ganjavi International Center (NGIC), Sustainable Development Goals–Africa, SDGUSA, and HealthEVillages, as well as RFKHR–UK, RFK HR–Italia and RFKHR–Suisse. She is on the advisory committee for the Association of American Indian Affairs, the Global Youth Action Network, the Albert Schweitzer Institute, Sankofa, San Patrignano, and the Center for Victims of Torture.

Kennedy received high honors from President Lech Walesa of Poland for aiding the Solidarity movement, The Humanitarian award from the Congress of Nobel Peace



7:40 AM



PANEL: BUILDING A PORTFOLIO FOR THE FUTURE – CONSIDERATIONS THROUGH 2023

MODERATOR: Michael Elio, Partner, Stepstone

Mike Elio is a partner at StepStone and is responsible for portfolio construction and management for high-net-worth distribution initiatives. Elio is also a co-head of the middle/large market buyout and secondaries sector teams. Prior to StepStone, Elio was a managing director at ILPA, where he led ILPA's programs around research, standards and industry strategic priorities. Prior to joining the ILPA, he was a partner and managing director at LP Capital Advisors and led the firm's Boston office where he served as the lead consultant to North American and European institutional investors. Elio served as the primary consultant for many of the firm's largest clients including public and private pension plans committing in excess of \$5 billion annually. Elio held several progressive positions in private equity, including vice president at State Street Corporation and vice president at Credit Suisse First Boston Private Equity overseeing the Funds Management Group.



David Enriquez, Head of Private Equity, Bureau of Asset Management, Office of the New York City Comptroller

J. David Enriquez serves as the head of private equity for the Bureau of Asset Management in the Office of the New York City Comptroller. In this role, he leads the investment activity of the private equity team in pursuing new initiatives, making recommendations and managing the private equity portfolio of the five NYC Retirement Systems.

Prior to joining the Bureau of Asset Management, Enriquez was an investment banking director at Rothschild. Prior to that position, he was an investment banker at Merrill Lynch and Bear Stearns. He has worked on financing and strategic advisory transactions representing more than \$200 billion in transaction value. Enriquez began his transactional career as an associate at Sullivan & Cromwell in the mergers & acquisitions group. Enriquez holds an AB, magna cum laude, Phi Beta Kappa, from Brown University, an MPA from the Woodrow Wilson School of Public and International Affairs at Princeton University and a JD from Columbia Law School, where he was a Harlan Fiske Stone Scholar.



Steve Moseley, Head of Alternative Assets, Alaska Permanent Retirement Fund Corporation

Steve Moseley is head of alternative assets for the \$66 billion Alaska Permanent Fund, a sovereign endowment established in 1976 to provide for all current and future generations of Alaskans. Beginning in 2013, Moseley launched and managed APFC's Private Equity and Special Opportunities programs. Before joining APFC Moseley restructured, managed, and subsequently sold Marston-Ross, a Connecticut-based family investment office. Before that he was president of StepStone Group, a global manager of private equity assets and, prior to that, co-president of the direct investment division of StepStone's predecessor company, Pacific Corporate Group

(PCG). During his time at PCG Moseley also served as CIO. Earlier in his career, Moseley served as a vice president in investment banking at Credit Suisse First Boston (CSFB) and as a principal in CSFB's private equity investment affiliate, Windward Capital Partners. He received his MBA from Yale University and his BA from Wesleyan University.

Chrissie Pariso, Senior Portfolio Manager, Private Equity and Head of Women and Minority Manager Program, Exelon Corporation



Chrissie Pariso is the senior portfolio manager at Exelon Corporation and is responsible for investing in private equity across Exelon's investment platforms. Exelon's Investment Office manages over \$40 billion of assets. Prior to joining Exelon, she was at GE Capital in the commercial distribution finance group, managing loss reserves on \$8 billion worth of assets. Before joining GE, Pariso was a vice president at Sterling Partners, a mid-market private equity firm, responsible for investing and portfolio monitoring. Pariso also worked at Dell Financial Services in the Treasury Department. She began her career as an investment banker with CIBC World Markets and received a BS in finance and international business from Georgetown University and an MBA from the University of Chicago. Pariso is also on the board and Midwest Steering Committee of WAVE (Women's Association of Venture and Equity). She loves to golf and kickbox.

Barry Volpert, Partner & Chief Executive Officer, Crestview Partners



Barry Volpert is co-founder and CEO of Crestview Partners, a value-oriented mid-cap private equity firm focused on investments in energy, financial services, industrial companies and media. He specializes in complex and contrarian investment themes arising out of major corporate dislocations or restructurings. Volpert started his career at Goldman Sachs, where he was a partner and a co-founder and chief operating officer of the global private equity business. Following the Goldman IPO, Volpert launched Crestview in 2004 with a group of former Goldman partners to continue to implement his strategy at an independent investment firm.

Volpert received a JD from Harvard Law School, where he was an editor of the Law Review; an MBA from Harvard Business School, where he was a Baker Scholar; and an AB from Amherst College, where he was elected to Phi Beta Kappa. After graduating from Amherst, he was a Luce Scholar in Singapore working for the Straits Times. Volpert is a member of the Dean's Advisory Board at Harvard Law School and a board director of Robert F. Kennedy Human Rights. Volpert and his wife Teri are avid supporters of higher education, Jewish philanthropy and medical research, with various board and committee and honoree roles over the years. They are the proud parents of four children: Michael (26), Steven (26), Lauren (24) and Jack (16).

8:35 AM

KEYNOTE FIRESIDE CHAT WITH GRAIN MANAGEMENT

David Grain, Founder and Chief Executive Officer, Grain Management



David Grain is the founder and CEO of Grain Management. He brings over 25 years of experience in industry and 15 years in private equity. He founded Grain in 2007, having formerly worked as a communications industry operator, private equity operating partner, and investment banking executive. Prior to Grain, he served from 2002 to 2006 as president of Global Signal, Inc. (formerly NYSE: GSL), the largest communication tower owner and operator at the time. Grain has also served as senior vice president at AT&T Broadband's New England region and was an executive director in the high-yield finance department at Morgan Stanley, where his focus was

TMT. He also served as an operating advisor to General Catalyst. Grain received a BA in English from the College of the Holy Cross and an MBA from the Amos Tuck School of Business Administration at Dartmouth College.



INTERVIEWER: Robert Atkinson, President, Information Technology and Innovation Foundation

Dr. Robert D. Atkinson is one of the country's foremost thinkers on innovation economics. He has conducted ground-breaking research on technology and innovation and authored three books, including *Big is Beautiful: Debunking the Mythology of Small Business* (MIT Press, 2018). Atkinson is a sought-after speaker and valued adviser to state, national, and international policymakers on topics ranging from tax policy to advanced manufacturing, productivity, and global competitiveness. As founder and president of the Information Technology and Innovation Foundation (ITIF), recognized as the world's top think tank for science and technology policy, Atkinson leads a prolific team of policy analysts and fellows that is successfully shaping the debate and setting the agenda on a host of critical issues at the intersection of technological innovation and public policy. Before founding ITIF, Atkinson was vice president of the Progressive Policy Institute (PPI) and director of PPI's Technology & New Economy Project. He received his master's in urban and regional planning from the University of Oregon and was named a distinguished alumnus in 2014. He received his PhD in city and regional planning from the University of North Carolina at Chapel Hill in 1989.

9:20 AM

**BUSINESS AND HUMAN RIGHTS INTERACTIVE WORKSHOP –
AMAZON CASE STUDY**



FACILITATOR: Michael Posner, Co-Director and Professor of Business and Society, Center for Business and Human Rights, New York University Stern School of Business

Michael Posner is the Jerome Kohlberg professor of ethics and finance at NYU Stern School of Business and director of the Center for Business and Human Rights. Posner served in the Obama administration from September 2009 until March 2013, as the Assistant Secretary of State for Democracy, Human Rights and Labor. Prior to that Posner was the longtime executive director and president of Human Rights First, a U.S.-based human rights advocacy organization. He was also a visiting lecturer at Yale and Columbia law schools. Posner has played a major role in shaping U.S. policy from inside and outside of government on issues ranging from refugee and asylum law and policy, to national security and human rights, to Internet freedom, and most recently on a range of business and human rights issues. He chairs the board of the Fair Labor Association, which addresses supply chain labor issues in the apparel, athletic footwear and agriculture sectors.

10:45 AM

KEYNOTE FIRESIDE CHAT WITH INSIGHT PARTNERS



Deven Parekh, Managing Director, Insight Partners

Deven Parekh is a managing director at Insight Partners and joined the firm in 2000. He manages investments in application software, data and consumer internet businesses globally. Notable previous companies in Parekh's portfolio have included Buddy Media (acquired by Salesforce, NASDAQ: CRM), Chegg (IPO), Football Fanatics (acquired by GSI Commerce, later acquired by eBay), Media Mind (IPO and subsequent sale to DG Fast Channel), Procuri (acquired by Ariba, NASDAQ: ARBA), ECI Solution (sold to Carlyle), Russian Trading System (merged with MICEX), Tumblr (acquired by Yahoo!), Hayneedle (sale to Jet.com), Syncsort (sale to Clearlake Capital), Alibaba (IPO), Twitter (IPO), JD.com (IPO), Website Pros (IPO), Yext (IPO), Drilling Info (sale to Genstar Capital), eVestment (sale to NASDAQ). Parekh is a global investor, having actively worked with investments in China, Latin America, Europe and Russia.

Parekh currently serves as board chair for Turnitin, Community Brands, Bullhorn, Appriss, Episerver, and EveryAction. He is a member of the board of directors for Fanatics, Diligent, 1stdibs, Vela, Chrono24, Wallapop, Campaign Monitor, and Property Brands. He represents the firm's interests in Despagar, Automattic (Wordpress), SkyTap and Zenefits. Parekh was previously a principal at Berenson Minella & Company, a New York-based merchant banking firm where he served on the firm's M&A Committee. Prior to Berenson Minella, Parekh was with The Blackstone Group, where he was involved in both M&A advisory and principal activities. He is a member of the technical advisory council of the Federal Communications Commission (FCC) which assists the Commission with developing informed technology policies supporting America's competitiveness and job creation in the global economy. During the period 2010–2012, Parekh served as a member of the advisory board of the U.S. Export-Import Bank which is the official export credit agent of the United States. He was nominated by President Obama and confirmed by the U.S. Senate in 2016 to be on the Overseas Private Investment Corporation Board. In 2006, Parekh was named a Henry Crown Fellow of the Aspen Institute, which seeks to develop the next generation of community spirited leaders.

He is chairman emeritus of the board of Publicolor (which he chaired from 2007–2012), a New York City based nonprofit organization that focuses on inner city schools. He is a member of the board of the Tisch New York MS Research Center. He has also served on the board of trustees and executive committee of the Ethical Culture Fieldston School. He serves on the Mayor's Fund to Advance New York City Board of Advisors. Parekh serves on the board of Overseers of NYU Langone. Parekh is also a member of the Council on Foreign Relations as well as the Economic Club of New York.

INTERVIEWER: David Fann, President and Chief Executive Officer, TorreyCove Capital Partners



David Fann is president, CEO and a founder of TorreyCove Capital Partners and is a member of the firm's board of directors and executive and investment committees. Fann has led investment organizations that have invested/committed over \$50 billion in private equity investments. With over 30 years of experience in the private equity industry, he has invested in 26 leveraged buyout, private equity and venture capital investments as a lead investor or co-investor, of which ten became publicly traded through successful initial public offerings and a number were acquired by Fortune 500 companies. Prior to co-founding TorreyCove, Fann was the president and CEO of PCG Asset Management, LLC. Previously, he was a managing director of US Trust and vice president of Citicorp Venture Capital. Fann has served on the board of directors of eleven companies, as a board observer for seven, as chairman of the board of directors

for two. He currently serves on the advisory boards of the Association of Asian American Investment Managers and the Robert H. Toigo Foundation. He holds dual bachelor's degrees in industrial engineering and economics from Stanford University.

11:25 AM

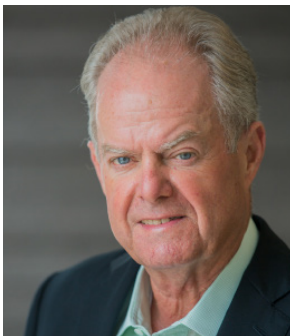
IN CONVERSATION: HOW SHOULD WE ADDRESS THE BIG TECH GOVERNANCE GAP?

MODERATOR: Paul Barrett, Deputy Director, Center for Business and Human Rights, New York University Stern School of Business



Paul Barrett joined the Center as deputy director in September 2017 after spending more than three decades as a journalist and author focusing on the intersection of business, law, and society. Most recently, Barrett worked for 12 years for Bloomberg Businessweek magazine, where he served at different times as the editor of an award-winning investigative team and a writer covering topics such as energy and the environment, military procurement, and the civilian firearm industry. From 1986 to 2005, he wrote for The Wall Street Journal, serving as the newspaper's Supreme Court correspondent and later as the page one special projects editor. He is the author of four critically acclaimed nonfiction books, the most recent of which are GLOCK: The Rise of America's Gun (2012), a New York Times Bestseller, and LAW OF THE JUNGLE: The \$19 Billion Legal Battle Over Oil in the Rain Forest and the Lawyer Who'd Stop at Nothing to Win (2014). Both of those books have been optioned for Hollywood movies. Since 2008, he has served as an adjunct professor at New York University School of Law. He co-teaches a seminar called "Law, Economics, and Journalism," in which students learn to analyze social issues with the tools of those three professions. Barrett has a JD from Harvard Law School and an AB from Harvard College.

Manuel "Manny" Medina, Chairman and Chief Executive Officer, Cyxtera



Manuel D. Medina is chairman and CEO of Cyxtera Technologies, bringing together a set of modern, software-defined cybersecurity capabilities with a global data center platform to deliver secure infrastructure solutions to enterprises and government agencies. Medina was the founder, chairman of the board and CEO of Terremark, a publicly traded company on NASDAQ until April of 2011, when Terremark was acquired by Verizon for an enterprise value of \$2 billion. At Terremark, he brought his vision to deliver a comprehensive set of best-of-breed IT infrastructure services from world-class data center facilities to fruition. Under his leadership, Terremark distinguished itself as a leading global provider of enterprise cloud computing, data center and cybersecurity services for Fortune 1,000 enterprises and federal government agencies. Following the sale of Terremark, he founded Medina Capital, a private equity firm with a focus on emerging cybersecurity technologies, in 2012 and currently serves as managing partner. He is also the founder and chairman of the board of eMerge Americas, the premier technology event connecting the U.S., Latin America and Europe. He has been recognized with accolades from many business and community organizations for his leadership and community service. He is a frequent speaker on topics ranging from technology trends and global business to entrepreneurship and has served as a panelist and keynote speaker at large conferences and IT industry trade shows. He also delivers inspiring commencement addresses to students at colleges and universities. He received his BA in accounting from Florida Atlantic University.



Vivienne Ming, Co-Founder and Executive Chair, Socos Labs

Dr. Vivienne Ming is a theoretical neuroscientist, entrepreneur, and author frequently featured for her research and inventions in The Financial Times, The Atlantic, Quartz and the New York Times. She co-founded Socos Labs, her fifth company, an independent think tank exploring the future of human potential. Ming launched Socos Labs to combine her varied work with that of other creative experts and expand their impact on global policy issues, both inside companies and throughout our communities. Previously, she was a visiting scholar at UC Berkeley's Redwood Center for Theoretical Neuroscience, pursuing her research in cognitive neuroprosthetics. In her free time, Ming has invented AI systems to help treat her diabetic son, predict manic episodes in bipolar sufferers weeks in advance, and reunited orphan refugees with extended family members. She sits on the boards of numerous companies and nonprofits including StartOut, The Palm Center, Cornerstone Capital, Platypus Institute, Shiftgig, Zoic Capital, and SmartStones. Ming also speaks frequently on her AI-driven research into inclusion and gender in business. For relaxation, she is a wife and mother of two.

12:10 PM

PANEL: THE DYNAMICS OF THE PRIVATE CREDIT MARKET TODAY

MODERATOR: Michael Manning, Managing Partner, NEPC



Mike Manning began his investment career in 1993 and joined NEPC in 1997. Manning became president of NEPC, LLC in 2003 and managing partner in April 2011. Manning works with a broad array of clients, covering Taft-Hartley, Public, Corporate, Private Wealth and Endowment and Foundation Investment Programs. He is a member of NEPC's Alternative Assets Committee. In addition, he is a frequent speaker at national industry conferences and seminars. Prior to joining NEPC, Manning worked in a money management division of Prudential Insurance Company of America focusing on private debt investing. Prior to Prudential, he worked at Putnam Investments and Fidelity Investments. Manning earned his MBA, with honors, from the University of Chicago Graduate School of Business, with concentrations in finance and accounting. At the University of Chicago, he served as a member of the school's admission's committee. He received his BA from the University of Notre Dame. Manning is a member of the Boston Security Analyst Society and the CFA Institute. Manning is a CFA charterholder and he also became a chartered alternative investment analyst (CAIA) designee in 2005.

Mark Attanasio, Co-Founder and Managing Partner, Crescent Capital Group



Mark Attanasio is the co-founder and managing partner of Crescent Capital Group, as well as chairman and principal owner of the Milwaukee Brewers. Founded in 1991, Crescent is an employee-owned alternative asset manager and SEC-registered investment advisor with approximately \$25 billion in assets under management and over 160 employees. Attanasio holds positions on several nonprofit boards, including Heal the Bay, the Los Angeles County Museum of Art (LACMA), and Harvard-Westlake School. In addition, Attanasio served on the President's Leadership Council at Brown University for a decade. He is currently chairman of the Major League Baseball (MLB) Investment Committee, as well as a member of the executive council and labor and revenue sharing definition committees. He received an AB from Brown University and a JD from Columbia University School of Law.



Maria Boyazny, Founder & Chief Executive Officer, MB Global Partners

Maria Boyazny is the founder and CEO of MB Global Partners, a New York-based private equity firm focused on credit and special situations investing. MB Global runs capital on behalf of Fortune 100 companies, foundations, pension funds, insurance companies and family offices. Boyazny has been named as one of the Top Five Most Influential Women in Alternative Investing, among other recognitions. She is the author of several publications, a frequent conference speaker and media commentator for the Wall Street Journal, Fox Business, CNN, Bloomberg TV, among others. Previously, Boyazny was a managing director and portfolio manager at Siguler Guff & Co. overseeing its flagship Distressed Opportunities Funds I, II, III and IV from inception to assets of \$4.5 billion over 10 years. Over the years, she has served on advisory boards of many leading asset management firms investing in the U.S., Asia and Europe. She earned her BS in economics and minor in mathematics from the Wharton School and an MBA from Columbia University.



David Flannery, President, Vista Credit Partners

David Flannery joined Vista Credit Partners in 2018. As president of Vista Credit Partners, Flannery is responsible for the strategic direction of the platform and oversees all transactions. Prior to joining Vista, Flannery served as senior managing director and co-head of capital solutions strategy at GSO Capital Partners, Blackstone's global credit investment platform, where he focused on distressed strategies in both private and public markets. Before his time with Blackstone, Flannery worked at Anchorage Capital Group, where he focused on illiquid credit opportunities and CLOs. Prior to Anchorage Capital Group, Flannery worked at Bank of America Merrill Lynch, where he most recently served as chief risk officer of global banking & markets. Before his time with Bank of America, Flannery held several roles at Deutsche Bank Securities.



Raelan Lambert, Global Leader, Private Debt, Mercer

Raelan Lambert is a managing director on the private markets team of Pavilion Alternatives Group based in Sacramento, California. Lambert has more than 14 years of private markets experience and 21 years of relevant financial services experience. She provides private markets advisory services to a variety of clients in North America and internationally. Lambert is a member of the firm's investment committee and oversees private debt investment opportunities for the firm globally. Prior to joining the firm, Lambert was based in New York City, where she spent a year at DoubleClick, a division of Google, developing new relationships with financial institutions. Prior to that, she was a consultant in American Express' Strategic Technology Relationships Advisory Group, which worked with all divisions of the firm and its top technology partners. Lambert started her career at Goldman Sachs in the finance and wealth management divisions, including assignments in Tokyo and Hong Kong. She received a BA in French language and literature, with honors, from the University of Virginia. Outside of work, Lambert enjoys time with her husband and two sons, cycling, dinners with friends, reading and sipping on fine European wines.



David Miller, Managing Director and Global Head of Private Credit and Equity, Morgan Stanley Investment Management

David Miller is the global head of private credit and equity and a member of Morgan Stanley Investment Management's Management Committee. Miller joined Morgan Stanley in 2016 and has over 21 years of investing experience. Prior to joining Morgan Stanley, he was the CEO of Silver Bay Realty Trust Corp., a publicly traded real estate investment trust he co-founded in 2011 to capitalize on the significant dislocation in the residential housing market. Prior to Silver Bay, Miller was a managing director at Pine River Capital Management and Two Harbors Investment Corp. where he focused on investment strategy and new business development.

During the global financial crisis (2008–2011), Miller served in various roles at the U.S. Department of Treasury, including the CIO of the Troubled Asset Relief Program (TARP), where he created complex crisis response investment programs and managed the \$700 billion portfolio. Prior to the U.S. Department of Treasury, he held various investment roles, including as a portfolio manager at HBK Investments and in the Special Situations Group at Goldman Sachs & Co, where he focused on opportunistic investments in public and private debt and equity. Miller received an MBA from Harvard Business School and a BA magna cum laude in economics from Dartmouth College where he was elected to Phi Beta Kappa.

1:25 PM

NETWORKING LUNCH WITH J. TODD MORLEY

INTRODUCTION: Matt Kennedy, Founder and Managing Partner, Converge

Matt Kennedy is the founder and managing partner of Converge. Previously, Kennedy served in senior roles in the Obama Administration at the Department of Commerce, Department of the Treasury, and the White House. As the director of the Office of Strategic Partnerships at Commerce, he worked closely with the Overseas Private Investment Corporation and Export-Import Bank of the United States to develop innovative public-private partnerships with leading trade organizations and several Fortune 500 businesses. Kennedy graduated from Stanford University with a BS in management science and engineering and holds an MBA from Harvard University. He sits on the board of the Robert F. Kennedy Human Rights and John F. Kennedy Presidential Library Foundation.



J. Todd Morley, Co-Founder of DIATOMS and Y2x and Co-Founder and Chairman of G2 Investment Group, and former Co-Founder of Guggenheim Partners

J. Todd Morley co-founded the investment firm Guggenheim Partners in 1999, which now has over \$310 billion in assets under management. He served on the Guggenheim board as well as on its executive committee. Prior to founding Y2x, Morley co-founded G2 Investment Group which aggressively endorsed moving away from funds and into permanent capital vehicles, as well as i(x) investments, the first investment platform dedicated to social impact. More recently, Morley co-founded Y2x, a blockchain centric merchant bank, as well as DIATOMS, Inc., a company organized to finance, build and own infrastructure companies focused on securitizing waste streams and developing technologies at scale in order to solve some of mother earth's most pressing challenges. Previously, Morley was CEO of Links Holdings LLC, a company he founded in 1996 to originate, trade and manage all forms of mortgage assets.

Prior to that, Morley founded Mortgages Plc, a London-based sub-prime mortgage lender, as a joint venture between Merrill Lynch and The Mortgage Operation. Additionally, Morley was a managing director in mortgage sales at Donaldson, Lufkin & Jenrette and he was a vice president in Lehman Brothers' Taxable Fixed-Income Department. Morley is a lead investor and sits on the advisory board of a variety of e-commerce, blockchain, AI, infrastructure, biotech and media companies. He is a board member and architect of enterprises including Delaware Life, Rising Holdings, Forbes Private Capital Group, and the Newport Development Company, an organization focused on resilient infrastructure. Morley is the author of several op-ed articles and academic white papers focused on structured finance, technology and "Peopleism," and he is planning to publish his first book in 2019, based on his new theory of financial return.



ROBERT F. KENNEDY HUMAN RIGHTS COMPASS

DINNER SPEAKERS

TUESDAY, JUNE 25, 2019

7:30 PM

RFKCOMPASS NETWORKING DINNER

WELCOME REMARKS: Christopher "Chris" Kennedy, Sr., Chairman, Joseph P. Kennedy Enterprises



Christopher G. Kennedy is chairman of Joseph P. Kennedy Enterprises, which is the investment firm of the Kennedy family. As chairman, Kennedy is responsible for the development of the Kennedy family's real estate holdings in Chicago known as Wolf Point. He is also the founder of Top Box Foods, a nonprofit, hunger-relief organization that addresses societal issues of hunger through the delivery of high-quality and affordable meats, fruits, vegetables and other food products throughout the Chicagoland area and which has additional operations in New England and the Gulf Coast.

Kennedy is a member of the board of trustees for Ariel Investments Mutual Fund, where he serves as chair of the Audit Committee. He is on the board of directors for Interface, Inc., where he serves as lead independent director and chair of the nominating and governance committee. Kennedy is also on the board for Knoll, where he serves as chair of the compensation committee. He serves on the Global Advisory Board at Northwestern University's Kellogg School of Management and at the University of Chicago, he serves as a trustee of the Marine Biological Laboratory. Kennedy earned a bachelor's degree in political science from Boston College in 1986 and a master's in management from the J.L. Kellogg Graduate School of Management of Northwestern University in 1994. He is the son of Robert and Ethel Kennedy and is the eighth of their eleven children. He and his wife, Sheila Berner Kennedy, have four children, Katherine, Christopher Jr., Sarah and Clare, and reside in suburban Chicago.

FIRESIDE CHAT WITH CLEARLAKE CAPITAL GROUP

José Feliciano, Co-founder and Chief Executive Officer, Clearlake Capital Group



José E. Feliciano is co-founder and managing partner of Clearlake Capital Group, a leading private investment firm founded in 2006. In addition to Feliciano's investing responsibilities, he is responsible for the day-to-day management of the firm. With a sector-focused approach, the firm seeks to partner with world-class management teams by providing patient, long-term capital to dynamic businesses that can benefit from Clearlake's operational improvement approach, O.P.S.® The firm's core target sectors are software and technology-enabled services; industrials and energy; and

consumer. Clearlake has managed approximately \$10 billion of institutional capital since inception and its senior investment principals have led or co-led over 100 investments.

Prior to co-founding Clearlake, he was a partner and member of the investment committee at Tennenbaum, a private investment firm focused on distressed and other special situations investments. Before joining Tennenbaum, he served as CFO of govWorks, Inc., a payments and other services provider to the public sector, where he managed the finance, corporate development and human resource functions. Prior to govWorks, Inc., he worked in investment banking in the M&A and corporate finance groups at Goldman, Sachs & Co. He has also been a private equity investor in the Latin America Enterprise Fund. He currently serves on the board of directors of several Clearlake portfolio companies.

He also co-founded the SUPERCHARGED Initiative, a philanthropic grantmaking and impact investment organization, in 2014 with his wife, Kwanza Jones. The Initiative invests in both nonprofit and for-profit ventures that advance the Initiative's goal of making a lasting impact across four key priorities: education, entrepreneurship, equal opportunity and empowerment. In addition, he serves on the board of directors of Robert F. Kennedy Human Rights and the Robert Toigo Foundation, a nonprofit organization dedicated to fostering the career advancement and increased leadership of underrepresented talent. He is the 2019 recipient of SEO Alternative Investments' Reginald F. Lewis Achievement Award. He graduated with high honors from Princeton University, where he received a BS in mechanical & aerospace engineering. He received his MBA from the Graduate School of Business at Stanford University.



INTERVIEWER: Marvin Rosen, Shareholder, Greenberg Traurig

Marvin Rosen is a senior partner at the international law firm of Greenberg Traurig, LLC. Rosen co-founded Fusion Telecommunications International, Inc. in 1997 and currently serves as the chairman of Fusion Telecommunications International, Inc. He was the director of Terremark Worldwide Inc. from April 2000 until it was sold to Verizon in 2011. He presently serves as a director on the board of Nikko Asset Management Americas, Inc. Rosen has been a board member of Robert F. Kennedy Human Rights since 1995. He currently serves as a board member of the Howard Gilman Foundation and Roundabout Theatre Group. He served as budget and finance chairman for the Summit of the Americas and chairman of the Florida Housing Finance Agency. Rosen served as Finance chairman for the Democratic National Committee from September 1995 to January 1997.

ROBERT F. KENNEDY HUMAN RIGHTS COMPASS

CONFERENCE SPEAKERS

WEDNESDAY, JUNE 26, 2019

8:00 AM

MORNING REMARKS

Sancia Dalley, Senior Vice President, Robert F. Kennedy Human Rights

Sancia Dalley leads private sector engagement and business development, while leading the RFKCompass Investor Program, a network of 250 institutional investors and fund managers who are committed to seeking superior risk-adjusted returns while considering human rights and the "S" in ESG. Dalley has over fifteen years of experience in corporate social responsibility, philanthropy, public-private partnership building and management, and global affairs.

Before joining Robert F. Kennedy Human Rights, she served under Ambassador Richard Holbrooke, the former U.S. Ambassador to the United Nations, and Ray Chambers, the former United Nations Special Envoy on Health Financing, where she led private-sector partnerships and financing in Africa and Latin America. Concurrently, she served as the private sector liaison to the Roll Back Malaria Global Partnership, the Board of the Global Fund to Fight HIV, Tuberculosis and Malaria, and the Corporate Alliance on Malaria in Africa. Dalley earned her AB in International Relations and French at Wesleyan College in Macon, Georgia. She is the founder of Redlake Global LLC, a boutique strategic philanthropy advisory group, and sits on the boards of Center for Active Design (CfAD) in New York and Boardwalk Village Foundation in Negril, Jamaica.



8:05 AM

PANEL: THE EVOLVING HEALTHCARE SECTOR – CREATING FINANCIAL SUSTAINABILITY WHILE DELIVERY QUALITY AND AFFORDABLE CARE

MODERATOR: Stephen DeCherney, Clinical Professor of Medicine, University of North Carolina - Chapel Hill

Stephen DeCherney, MD, MPH is a professor of medicine, and former professor (adjunct) in the Kenan-Flagler School of Business, UNC-Chapel Hill. Prior to joining the faculty at UNC, DeCherney worked at Quintiles Transnational Corporation. DeCherney held two executive roles there: president of global clinical research organization and chief innovation officer. DeCherney's divisions included approximately 10,000 staff spread among 50 countries.



DeCherney is a director of Health Decisions, Inc, and a senior advisor to Anagenesis Capital Partners, Inc. He was an independent director of Theorem Clinical Research Company, on which he sat on the audit committee. From 2008-2010, he was a member of the board of Symyx Corporation, as an independent director on the audit committee. In October 2008, he was elected as a trustee of the William Harvey Research Institute, Queen Mary Medical College, St .Barts and the London Hospitals, University of London. He was only one of two American senior advisors of the London School of Hygiene and Tropical Medicine, University of London and a senior advisor to the London Genetics Company. He serves as chair of the University of Delaware Research Foundation, a trustee of the Christiana Care Health System, Delaware, and was a member of the Board of Trustees of Farmer Food Share and chairman of the finance subcommittee.

A research physician, named to the Best Doctors in America, who is board certified in internal medicine and endocrinology/diabetes/metabolism, DeCherney's research background includes four and a half years at the National Institutes of Health (NIH), followed by 11 years in various management roles in the Christiana Care Health System in Wilmington, Delaware. While there, he was the principal investigator for more than 100 clinical trials. During the same period, he also served as an associate professor at both the University of Delaware and Thomas Jefferson University. He left Christiana Care Health System to become EVP of Global Clinical Operations at PRA International, where he remained until joining Quintiles. DeCherney is author or co-author of over 100 publications.

DeCherney is a graduate of Columbia University in New York City where he received a BA in biology. He was awarded the Columbia College Alumni Achievement Award granted to the senior adjudged most outstanding in qualities of mind, character, and service to the college. He received his medical degree from Temple University in Philadelphia, and completed his internal medicine residency at the Graduate Hospital of the University of Pennsylvania. DeCherney received his endocrinology training at Vanderbilt University and earned an MPH, healthcare management, from Columbia University School of Public Health.



Ryan Bailey, Head of Investments, Children's Health System of Texas

Ryan Bailey is the head of investments at Children's Health System of Texas, where he oversees \$1.7 billion in assets. Bailey and his team are responsible for creating and managing the investment strategy for the hospital's pension, foundation, operating cash, and long term pools. As the hospital's inaugural investment officer, he established the department, designing and implementing the systems, processes, and governance structures required in the formation of a top tier endowment office. Prior to Children's Health, Bailey served as investment officer and interim CIO of the Meadows Foundation. In this capacity, he drove the due diligence process, aided the development of strategic asset allocation, and constructed and implemented investment strategy to achieve competitive performance. In 2000, he founded a trading company located at the World Trade Center One and later, after surviving the events on 9/11, relocated to Dallas, Texas. Bailey currently serves as a director on the board of Blue Dolphin Energy (BDCO), board member for the Texas Hedge Fund and is an angel for the Texas Wall Street Women. He graduated from Yale University with a BA in economics and holds a number of certifications including: chartered financial analyst (CFA), financial risk manager (FRM), chartered alternative investment analyst designation (CAIA), and chartered market technician (CMT) designations.



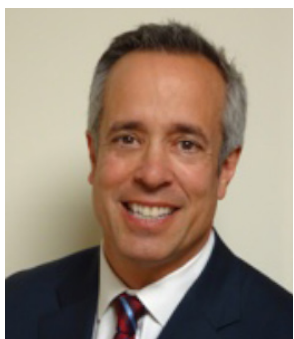
Charles Boorady, Founding Managing Director, Health Catalyst Capital

Leveraging over 30 years of experience with publicly-traded and private healthcare company investment and information technology business reengineering activity, Charles Boorady leads a firm that invests in entrepreneurial teams building high growth healthcare information technology, InsureTech and technology-enabled healthcare service businesses that improve the human condition and value. Past firms include Credit Suisse, Goldman Sachs, Citi and Accenture. Prior achievements include lead analyst on the Anthem demutualization and IPO and No. 1 ranking by Institutional Investor Magazine for his coverage of managed care. HCC is independent and not affiliated with a consultancy or investment bank. Investors in HCC include institutional investors and leading healthcare corporations with strategic interest in market-leading and disruptive businesses. Boorady was a founding advisory board member of The Oliver Wyman Health Innovation Center which evolved into the Leaders' Alliance.



Matthew "Matt" Holt, Managing Director and Head of Private Equity, New Mountain Capital

Matthew Holt, managing director, joined New Mountain in 2001. He serves as the deputy head of private equity and focuses on growth buyouts across a range of industries including healthcare products, health technology, materials and infrastructure. He previously worked in the mergers and acquisitions group at Lehman Brothers from 1999 to 2001. He serves as the lead director or chairman of Avantor, Inc., CIOX Health, Signify Health, Convey Health Solutions, Inc., Cytel, Equian LLC, Revint Solutions and Zep, Inc. He also serves as a director of Topix Pharmaceuticals, Gelest, and TRC Companies. Holt has previously served as lead director of Bellerophon Therapeutics, Inc., Ikaria, Inc., Nusil Technology LLC, and director of MailSouth. Holt holds an AB with honors in English and American literature and language from Harvard College.



Mike Mogul, President and Managing Director, HealthpointCapital

Mike Mogul was last president, chief executive officer and director of DJO Global, a \$1 billion firm in the orthopedic sector owned by Blackstone, and market leading in non-operative segments including bracing and physical therapy equipment. DJO was also the fastest growing firm in total joint implants and consumer sports medicine under his leadership. Prior to joining DJO, Mogul served as group president for the orthopaedics department, for Stryker Corp. managing Stryker's global orthopaedic businesses, which represented approximately \$3 billion in revenue. Additionally, in his 22 years in the musculoskeletal space at Stryker, Mogul served as managing director of all of Stryker's divisional segments in Germany, Austria and Switzerland. Mogul received a BS from the University of Colorado and has attended the advanced management program at the Harvard Business School.

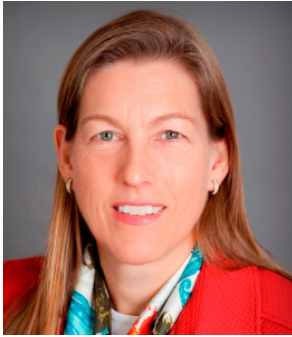


Janice Topp, Partner, HOOPP Capital Partners

Janice Topp has been a partner on the HOOPP Capital Partners (HCP) team since 2014 and is integrally involved in all aspects of the HCP business. As a team member she is responsible for leading acquisition analysis, due diligence, transaction negotiation and documentation as well as assisting investee companies when requested by them. Prior to joining HCP, Topp gained 7 years of experience in direct mid-market private equity investing as senior vice-president of a Canadian private equity firm. Topp has held positions of chief financial officer and treasurer in two multibillion-dollar companies since 1996; one being a wealth management company with assets in excess of \$30 billion at the time of its sale in 2005 and the second being a leading Canadian property investment and real estate merchant banking operation that was traded on the TSX. Topp spends her free time curling, attending hockey games (Leafs) and at the cottage with family and friends in the summer.

9:00 AM

PANEL: IN PURSUIT OF THE DEAL - PERSPECTIVES FROM GPS DEAL-MAKING STRATEGIES



MODERATOR: Nina Streeter, Director of Asset Management, Abbot Downing

Nina Streeter is a director of asset management in Abbot Downing's Boston Office and a member of the group's illiquid assets team. She focuses on all facets of sourcing, researching, selecting for approval and monitoring private capital (including the full range of private equity, private debt and special situations) and illiquid real assets (including real estate, energy, timber and farmland) fund investments for Abbot Downing clients. She is also engaged in asset allocation and portfolio construction within these sectors. Streeter has worked in the financial services industry for over 20 years serving both taxable and tax-exempt clients. She earned her MS from the MIT Sloan School and a BA from Harvard College. Her non-family, non-work interests include rowing, being outside, nature, and birdwatching, all of which you can do from a rowing shell.



Robert Fitzsimmons, Managing Partner, High Road Capital Partners

Robert J. Fitzsimmons is co-founder and managing partner of High Road Capital Partners, a private equity firm formed in 2007 with \$470 million of funds under management. High Road is focused on buying and building niche-leading companies at the smaller end of the middle market, and today owns 12 companies with over \$500 million of aggregate revenues. As managing partner, he oversees all aspects of the firm's activities. Previously, Fitzsimmons served as a managing partner with The Riverside Company, as an investment professional with Citicorp Venture Capital, and as an audit and tax accountant with Price Waterhouse. He has executed over \$2.5 billion worth of transactions over the course of a twenty five year career in private equity. He holds a BS in accounting from the University of Pennsylvania and an MBA in finance from the University of Chicago.



Aaron Gershenberg, Founder and Managing Partner, Silicon Valley Bank Capital

Aaron Gershenberg is a founder of Silicon Valley Bank (SVB) Capital's fund of funds and direct funds, SVB Capital. Gershenberg joined SVB in 1999 and has been part of the venture capital industry since 1996. Under his leadership, the group has over \$4.5 billion under management across fund of funds, direct funds and separate accounts. His expertise is evaluating venture capital funds globally while building a unique value proposition for institutional investors seeking to access the innovation economy. He has published numerous articles on the future of venture capital and is frequently invited to speak and moderate panels at conferences in the U.S. and overseas. Prior to joining SVB, Gershenberg opened FirstCorp's Northern California office, a venture leasing group focused on early stage companies. In this capacity, he was responsible for providing venture financing to more than 50 startup technology companies. Previously, Gershenberg was part of the Union Bank of California's Investment Banking Group and Deloitte & Touche's Real Estate Consulting Practice.

Gershenberg earned a bachelor's degree in economics and African studies from Wesleyan University and a master's degree in finance and public policy from the John F. Kennedy School of Government at Harvard University. Gershenberg combines his passion for philanthropy with his love of the outdoors. In 1984 he joined 50 students biking from Boston to Los Angeles, raising money for Oxfam America. In 2003, Gershenberg was a founder of the Hearst Castle Best Buddies ride, a 100-mile ride from Carmel to the Hearst Castle benefiting the intellectually and developmentally disabled. He has raised over \$3M to date for Best Buddies, serves on the 25

international board of 1st Move, and is board observer on Play Magnus — making chess part of the second and third grade curriculum to promote STEM education. Gershenberg is an accomplished kite boarder and loves kiting on waves and the snow. As an ambassador for the sport, Gershenberg has helped numerous entrepreneurs and investors become kite boarders.



Samuel Katz, Founder and Managing Partner, TZP Group

Samuel Katz is the founder and managing partner of TZP Group, a New York-based private equity firm with \$1.4 billion in capital under management. Katz began his career in 1986 as a financial analyst at Drexel Burnham Lambert. From 1988 to 1992, he was an associate and vice president at The Blackstone Group, where he worked on numerous private equity transactions, including the initial LBOs of several hotel franchise brands, which created the predecessor to Cendant Corporation. From 1992 to 1995, he invested in private and public equity as co-chairman of Saber Capital, Inc and vice president of Dickstein Partners Inc. Katz joined Cendant in 1996 and through 2005 led the execution of numerous transactions as Cendant's most senior corporate and strategic development executive. He also served on Cendant's Investment Committee and held various operating and management roles, including CEO of Cendant Internet Group (2000), chairman and CEO of Travelport Limited (2001-2005), co-chairman of Affinion Group Inc (2003-2005), and chairman and CEO of Cendant's Financial Services division (2003). After Cendant, Katz joined MacAndrews & Forbes Acquisition Holdings Inc (2006-2007) as CEO.

Katz serves as a member of the board of directors of Water Cooler Group LLC, BQ Resorts LLC, Cloud5 LLC, Lift Brands Inc, Global Employment Solutions Inc, BigName Holdings LLC d/b/a Envelopes.com, Family Entertainment Group LLC, University Furnishings LLC, HomeRiver Group Holdings LLC, Pyramid Management Holdings LLC, Hylan Holdings LLC, Triangle Home Fashions Holdings LLC, Whitestone Home Furnishings LLC (d/b/a The Saatva Company), and Dwellworks Investors LLC. He also serves as a member of each of TZP's Investment Committees. Katz received his BA magna cum laude in economics from Columbia College in 1986.



Scott Spielvogel, Managing Partner and Co-Founder, One Rock Capital Partners

R. Scott Spielvogel is a managing partner and co-founder of One Rock Capital Partners, LLC. Prior to founding One Rock, Spielvogel was a managing director at Ripplewood Holdings. He joined Ripplewood in 2005 and was responsible for investments in the business services and telecommunications sectors. Prior to joining Ripplewood, Spielvogel worked at Windward Capital Partners, a private equity firm based in New York, which he joined in 1998. Prior to Windward, he was with CIBC Oppenheimer's High Yield and Merchant Banking Group (formerly known as The Argosy Group), working on a wide variety of mergers and acquisitions, restructuring, and financing transactions. Spielvogel earned an AB in economics from Harvard College and serves as treasurer of the Harvard Club of New York Foundation.

9:55 AM

IN CONVERSATION – A DISCUSSION ON VENEZUELA AND THE STATE OF HUMAN SECURITY AND ECONOMIC OUTLOOK



MODERATOR: Pedro Torres-Mackie, Founder and Managing Partner, Quotidian Ventures

Pedro Torres-Mackie is the founder and managing director of Quotidian Ventures, and the co-chair of the board at the New York City Foundation for Computer Science Education (CS4All). Quotidian is an early-stage Venture Capital firm based in New York City, with a portfolio of 65+ software companies that have achieved over \$1.7 billion in realized exits to date, and created over \$20 billion in enterprise value. Torres-Mackie has been recognized as part of Forbes' 30 Under 30 in Venture Capital, and Crain's New York Business' 40 Under 40. Outside his work at Quotidian and CS4All, Torres-Mackie is a member of the advisory board for the Bronx Academy for Software Engineering (BASE), and a member of the board of directors at Run for Something and Robert F. Kennedy Human Rights.



Angelita Baeyens, Program Director, Advocacy and Litigation, Robert F. Kennedy Human Rights

Angelita Baeyens joined Robert F. Kennedy Human Rights as programs director of advocacy and litigation in June 2014. Baeyens is the lead attorney in over a dozen cases before the Inter-American system of human rights, including cases on freedom of expression, enforced disappearance of human rights defenders, and violence against women in the Americas. She previously served at the United Nations as the political affairs officer in the Americas division of the UN Department of Political Affairs in New York from March 2012 to May 2014. Baeyens also worked as a human rights officer in the Inter-American Commission on Human Rights (IACHR) in Washington DC since 2006. In 2008, she became the special assistant to the executive secretary, and starting in 2009, she also served as the coordinator of the Office of the Rapporteur on Human Rights Defenders of the IACHR. Baeyens has served as an adjunct professor of law at Georgetown University Law Center since 2012. A dual Belgian and Colombian citizen, she holds a law degree from the University of Ibagué (Colombia) and an LLM in international human rights law from the University of Notre Dame. Baeyens is fluent in Spanish, French and English.



Ricardo Hausmann, Professor of the Practice of Economic Development and Director, Center for International Development, Harvard Kennedy School of Government

Dr. Ricardo Hausmann is director of Harvard's Center for International Development and professor of the Practice of Economic Development at the Kennedy School of Government. Previously, he served as the first chief economist of the Inter-American Development Bank (1994-2000), where he created the research department. He has served as Minister of Planning of Venezuela (1992-1993) and as a member of the board of the Central Bank of Venezuela. He also served as chair of the IMF-World Bank Development Committee. He was professor of economics at the Instituto de Estudios Superiores de Administración (IESA) (1985-1991) in Caracas, where he founded the Center for Public Policy. His research interests include issues of growth, macroeconomic stability, international finance, and the social dimensions of development. He holds a PhD in economics from Cornell University.

10:40 AM

PANEL: OPPORTUNITIES AND CHALLENGES FACING BOTH PUBLIC AND PRIVATE INVESTMENTS IN EMERGING MARKETS

MODERATOR: Kristin Giral, Principal and Head of Global Equity, Prime Buchholz



Kristin Giral joined Prime Buchholz, an investment consulting firm, in 2005. She has more than 19 years of experience in the investment industry, with a focus on foreign equity. Giral serves as chair of the firm's Global Equity Asset Class Committee and as a member of the investment committee. Previously, she was in corporate development at Putnam Investments, and was an investment banker at Legg Mason Wood Walker, Inc. She currently serves as president of the board of directors of Rye Education Foundation. Giral holds a BS in business administration with a concentration in finance from Villanova University.

Milton Berlinski, Managing Partner, Reverence Capital Partners



Milton Berlinski co-founded Reverence Capital in June 2013 after concluding a 26-year career at Goldman Sachs, which he joined in 1986 and where he served as a founding member of the financial institutions group in investment banking, focusing on banks, consumer and commercial finance companies, asset management, insurance and capital markets. He also served as head of strategy and corporate development in the period after Goldman Sachs' IPO, assisting the executive office and division leaders to create and execute a strategy to build out Goldman Sachs' global footprint. For the final 10 years of his Goldman Sachs tenure, Berlinski had global responsibility for coverage of the firm's financial sponsor and hedge fund clients, overseeing a dramatic increase in revenue from the business and working alongside Goldman Sachs' merchant banking team on co-investment opportunities in transactions involving the firm's clients. Berlinski has led or executed over 130 transactions in financial services across all sectors, including numerous strategic acquisitions by Goldman Sachs itself. Berlinski was also a member of the operating committee and the compensation committee during his time at the firm. He received a BA in engineering from California State University, Northridge and an MBA from Wharton. Berlinski serves on the board of directors for Victory Capital, Kabbage, Russell Investments, Diamond Resorts, and Venerable Holdings (HoldCo).

Brian Gimotty, Managing Director, Investment Office, UAW Retiree Medical Benefits Trust



Brian Gimotty is a director of the UAW Retiree Medical Benefits Trust. The Trust provides post-retirement medical benefits for more than 800,000 retirees of GM, Ford and Chrysler. The Trust has over \$55 billion in investment assets. At the Trust, Gimotty is responsible for private equity. Prior to joining the Trust, Gimotty was senior advisor at Strength Capital Partners (SCP) from 2012-2013. Strength Capital Partners is a mid-market private equity manager based in the Midwest. He was responsible for leading a successful portfolio restructuring with two blue chip institutional investors. Prior to SCP, Gimotty was managing director at Trinity Equity Investors from 2010-2012 where he was responsible for sourcing and due diligence of private equity special situations and fund restructurings in emerging markets.

Before joining Trinity, he was a senior advisor to Paul Capital Partners based in London from 2005-2010. Paul Capital is a global secondary investor with more than \$5 billion AUM, and Gimotty was responsible for sourcing transactions, supported the investment team in due diligence/structuring, and participated in the investment committee. Prior to joining Paul Capital, Gimotty was president of Growth Capital Group (GCP) International from 2004. GCP was a Poland based advisory company he helped found that provided consulting and managed private equity investments on behalf of high net worth individuals. Gimotty has also managed microfinance and disaster relief projects in Africa and Asia. Gimotty earned his MBA with distinction



from University of Michigan and his AB from Harvard with a dual concentration in government and French language and civilization. Gimotty is a native English speaker and speaks French, Polish, and has a basic knowledge of Russian and Spanish.

Sharmila Kassam, Senior Consultant, Funston Advisory Services

Sharmila Kassam is senior consultant at Funston Advisory Services. She was formerly the deputy CIO at the Employees Retirement System of Texas (ERS). As a member of ERS's investments division, she worked closely with the CIO, managing investments in all asset classes to develop internal best practices, analyze asset allocation, oversee external management and pursue new initiatives. Kassam was a voting member of the private equity and infrastructure investment committees for the \$29 billion ERS Retirement Trust Fund and actively works with the \$2.9 billion Texa\$aver 401(k) / 457 Program, a voluntary defined contribution plan. Prior to her the ERS, she served as an assistant general counsel at ERS for five years during the initial stages of its private equity program, leading legal negotiations with multiple fund sponsors and later working closely with the private real estate and hedge fund teams as they developed their programs and negotiated venture transactions.

Before joining ERS, Kassam was an associate at Wilson, Sonsini, Goodrich and Rosati, focusing on securities, mergers and acquisitions and corporate governance. She also worked at multiple start-ups and technology companies in financial and management roles prior to entering the legal profession. She began her career as an audit associate at Coopers & Lybrand (now PriceWaterhouseCoopers). Kassam is a licensed certified public accountant and also licensed to practice law in California and Texas. She holds a bachelor of business administration in accounting, with honors, and a JD from The University of Texas at Austin.

11:25 AM

PANEL: OPPORTUNITIES IN REAL ESTATE AND REAL ASSETS

MODERATOR: John Haggerty, Managing Principal and Director of Private Markets, Meketa Investment Group



John A. Haggerty joined Meketa Investment Group in 1996 and has been in the financial services industry since 1993. Haggerty carries consulting, management, and research responsibilities. He chairs the firm's private markets investment committee (PMIC), which has overseen the deployment of over \$35 billion in client commitments since 2000. The PMIC governs client portfolio management, commitment pacing, strategic policy, and approval of individual investments. Haggerty is also a member of the firm's private equity, private debt, real estate, and real assets investment committees. In addition, he founded and co-chairs the firm's ESG committee. Haggerty became a CFA in 1998 and is a member of the CFA Institute and the CFA Society Boston. He serves on the advisory board of numerous buyout and venture capital limited partnerships. Haggerty held previous positions at IBC/Financial Data and The Boston Company. He is a graduate of Cornell University. He is also a member of the board for Friends of Caritas Cubana.

Matthew Freedman, Chief Investment Officer, Louisiana School Employees' Retirement System



Matt Freedman joined Louisiana School Employees' Retirement System (LSERS) as chief investment officer in 2017, where he is responsible for managing the system's \$2 billion investment portfolio. Prior to LSERS, Freedman worked at Landseer Advisors, a New York-based investment office that serves endowments and foundations. At Landseer, he was one of three investment professionals responsible for sourcing, evaluating, and monitoring public and private market investments across the capital

structure and globally. Freedman began his career at State Street in 2007 advising the bank's largest clients on topics including asset allocation, manager selection, and portfolio risk management. He holds an MS in finance from Boston College and a BA in political science and government from Washington University in St. Louis, and is a chartered alternative investment analyst (CAIA) charterholder.



Phil Greenberg, Managing Director, Real Assets, Pennsylvania State Employees Retirement System

Phil Greenberg is the managing director of real estate at the Pennsylvania State Employees' Retirement System (SERS), where his principal responsibilities include providing investment decisions and oversight for SERS' \$2 billion real estate and real assets portfolio. Greenberg was previously a senior managing director for C-III Capital Partners in NYC, where he was responsible for capital raising and investor relations. Before his time at C-III, he was a director with Cornell University's Investment Office, where his main responsibilities were to provide oversight of the real estate portfolio for the \$5 billion Cornell Long Term Investment Pool, including the university's endowment. Greenberg has also taught at the graduate level at both Cornell University and Ithaca College. His previous professional experience includes real estate consulting, acquisitions, dispositions, development and asset management.

Greenberg was also a submariner in the United States Navy. Greenberg graduated magna cum laude from Arizona State University with a BS in finance and earned his MBA at Cornell University's Johnson Graduate School of Management. He was awarded the chartered financial analyst designation in 2001. Greenberg is married with two boys and is currently a board member of the Finger Lakes Land Trust, whose mission is to conserve forever the lands and waters of the Finger Lakes region, ensuring scenic vistas, local foods, clean water and wild places are protected. His additional hobbies and interests include cooking and edible wild mushroom hunting.



Jeff Krasnoff, Chief Executive Officer, Rialto Capital

Jeff Krasnoff is CEO of Rialto Capital Management, which he formed in 2007 to capitalize on investment opportunities in the commercial real estate sector. Today, Rialto is a vertically 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 private equity vehicles and has overseen investments with other partners, including pension funds, endowments, insurance companies, family offices, financial institutions, sovereigns and the U.S. Department of Treasury. With over 40 years of experience in commercial and residential real estate investment, finance and management, Krasnoff has been involved in the evaluation or oversight of hundreds of billions of dollars of real estate assets around the world.

Krasnoff is also the co-founder of LNR Property Corporation, and was its president since its spinoff from Lennar as a separate public company in 1997, as well as its CEO from 2002 to 2007. He was instrumental in taking the company private in a \$4 billion transaction in early 2005. Krasnoff joined Lennar in 1986 and from 1990 until LNR spun off from Lennar, he was responsible for the growth of Lennar's commercial real estate and joint venture businesses, as well as the formation of LNR Partners and its loan workout and special servicing operations. LNR became the world's largest CMBS special servicer under his leadership. Prior to LNR and Lennar, Krasnoff spent ten years with KPMG, LLC (formerly Peat Marwick) in New York and Miami specializing in real estate and mergers and acquisitions. Krasnoff is a graduate of Duke University.

12:05 PM

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