

CONFERENCE AGENDA



TUESDAY, JUNE 13

AFTERNOON PROGRAM | CHATHAM BARS INN

- 12:00 PM** **MEETING OF ROBERT F. KENNEDY HUMAN RIGHTS' BOARD OF DIRECTORS**
Harbour View Room, Main Inn
- 12:00 PM** **CONFERENCE REGISTRATION OPENS**
South Lawn
Registration opens at the tent on the South Lawn of Chatham Bars Inn
- 2:30 PM** **WELCOME REMARKS FROM CONFERENCE CO-CHAIR**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights; Co-Chair, RFK Compass Investors Conference
- 2:40 PM** **DEEP DIVE: THE EVOLVING CAPITAL MARKETS AND GEOPOLITICAL THREATS**
- PART ONE: THE EVOLVING CAPITAL MARKETS**
Lupin Rahman, Executive Vice President and Portfolio Manager, PIMCO
Peggy Roberts, Managing Partner, Riverside Capital Appreciation Fund, Riverside Company
Anastasia Titarchuk, Chief Investment Officer, New York State Common Retirement Fund
Moderator: **Marvin S. Rosen**, Shareholder, Greenberg Traurig; Co-Chair, RFK Compass Investors Conference
- PART TWO: RUSSIA'S WAR IN UKRAINE | PREPARING FOR UKRAINE'S RECOVERY – WHY NOW?**
Introduction by **Kerry Kennedy**, President, Robert F. Kennedy Human Rights
Natalie Jaresko, Managing Director, Turnaround and Restructuring Strategy, EY-Parthenon; Former Minister of Finance, Ukraine
Lenna Koszarny, Founding Partner and Chief Executive Officer, Horizon Capital
Ambassador William "Bill" Taylor, Former United States Ambassador to Ukraine
Kateryna Yushchenko, Former First Lady of Ukraine
- 4:10 PM** **SPOTLIGHT WITH MARIA GIRALDO**, Managing Director, Macroeconomics and Investment Research, Guggenheim Partners

TUESDAY, JUNE 13

AFTERNOON PROGRAM | CHATHAM BARS INN

- 4:25 PM** **INTERACTIVE WORKSHOP ON HUMAN RIGHTS RISKS FOR INVESTORS**
Facilitated by **Michael Posner**, Professor of Business & Society and Director, Center for Business & Human Rights, NYU Stern School of Business
- 5:25 PM** **DAY ONE WRAP-UP**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights; Co-Chair, RFK Compass Investors Conference
- 5:30 PM** **NETWORKING RECEPTION**
South Lawn, Outside the Tent
- 7:00 PM** **OPENING DINNER**
South Lawn Tent - *Seating is pre-assigned.*
Greetings from **Kerry Kennedy**, President, Robert F. Kennedy Human Rights
- FIRESIDE CHAT: CREATING IMPACT AND RETURNS IN A DIVIDED WORLD**
A conversation with **Brad Lander**, Comptroller, New York City and **Michael Fisch**, Founder and Chief Executive Officer, American Securities
- 9:30 PM** *Shuttles will depart from Chatham Bars Inn to return guests to Chatham Wayside Inn and Queen Anne Inn.*



A special thank you to the Kwanza Jones & José E. Feliciano Initiative for their generous support of the RFK Compass Investors program in their ongoing efforts to convene, educate, and catalyze the investment world for social good, mobilizing leaders to seed collective actions in support of human rights.

WEDNESDAY, JUNE 14

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

7:15 AM

Breakfast will be available inside the conference tent on the South Lawn.

8:00 AM

MORNING REMARKS

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

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

8:10 AM

INVESTING IN ROCKY TIMES — THE GAINS, LOSSES AND OPPORTUNITIES

Tom Burger, Co-Founder and Managing Partner, Gridiron Capital

Matthew Jones, Co-Managing Partner, North American and European Secondaries, TPG

Stefan Kaluzny, Founder and Managing Director, Sycamore Partners

Ulrich Smith, Co-Managing Partner, FSN Capital

Moderator: **Matthew Coyne**, Managing Director, Portfolio Advisory, Aksia

9:00 AM

DEEP DIVE: EQUITY IN ACTION — USING DATA FOR BETTER DECISION-MAKING

PART ONE | CONTEXTUALIZING DEIA DATA IN ASSET MANAGEMENT

A special presentation by **Jason Lamin**, Founder and Chief Executive Officer, Lenox Park Solutions



PART TWO | IN CONVERSATION WITH ALLOCATORS: USING DATA FOR DECISION-MAKING

Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference

Bailey DeVries, Associate Administrator, Office of Investment and Innovation and Acting Associate Administrator, Office of Capital Access, U.S. Small Business Administration

David Gurtz, Deputy Chief Investment Officer, Massachusetts Pension Reserves Investment Management Board

Reginald Saunders, Director of Investments, Kellogg Foundation

Moderator: **Amber Kizilbash**, Chief Operating Officer, Lenox Park Solutions

10:05 AM

KEYNOTE FIRESIDE: INVESTORS ROLE IN SUPPORTING SOCIO-ECONOMIC PROGRESS

A conversation with **Thomas P. DiNapoli**, Comptroller, State of New York and **Brooke Lierman**, Comptroller, State of Maryland. Interviewed by **Kerry Kennedy**, President, Robert F. Kennedy Human Rights

WEDNESDAY, JUNE 14

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 10:35 AM** Networking Break
- 10:45 AM** **IN CONVERSATION: THE EVOLUTION OF THE EMERGING MANAGER**
Taffi Ayodele, Director, Diversity, Equity and Inclusion and Emerging Manager Strategy, New York City Retirement System
Joe Benavides, Co-Founder and Managing Partner, OceanSound Partners
Jason Mundt, Managing Director, Siguler Guff
Michael “A.B.” Orr, Managing Director and Chief Investment Officer, Xponance Alternatives
Charles Pippen, Principal, Real Estate Investments, GCM Grosvenor
Patrick K. Sherwood, Principal, GroveStreet
Bharath Srikrishnan, Founder and Managing Partner, BharCap Partners
Facilitators: **Katie Moore**, Managing Director, Head of Emerging and Diverse-Led Investments, Hamilton Lane and **Pamela Pavkov**, Partner and Managing Director, TPG Next
- 11:50 AM** **SPOTLIGHT: ENERGY SECURITY AND THE ENERGY TRANSITION**
Bill Montgomery, Senior Partner, Quantum Capital Group
- 12:15 PM** **OPPORTUNITIES FOR PRIVATE EQUITY INVESTORS**
Steve Rodgers, Managing Director, Head of Healthcare Investing, Morgan Stanley Capital Partners
Ricardo Rodriguez, Managing Director, Grain Management
Scott Spielvogel, Co-Founder and Managing Partner, One Rock Capital Partners
Eric Taylor, Founder, Chief Executive Officer, and Chief Investment Officer, Trident
Moderator: **David Fann**, Senior Managing Director and Vice Chairman, Apogem Capital
- 1:05 PM** *Lunch Buffet opens*
- 1:30 PM** **LUNCH FIRESIDE: VALUE CREATION IN A DYNAMIC MARKET ENVIRONMENT**
Martin Taylor, Senior Managing Director, Co-Head of Foundation Fund, Vista Equity Partners. Interviewed by **Jesse Beck**, Investment Director, Mercer Alternatives
- 3:00 PM** *Shuttles will depart from the South Lawn Tent to take all guests to the Kennedy Compound for the afternoon programming and dinner.*

WEDNESDAY, JUNE 14

AFTERNOON PROGRAM | SOUTH LAWN, CHATHAM BARS INN

4:15 PM

WELCOME TO THE KENNEDY COMPOUND

The Home of Ted & Kiki Kennedy

Introduction by Kerry Kennedy, President, Robert F. Kennedy Human Rights

KEYNOTE FIRESIDE

A fireside conversation with **Kenneth Chenault**, Chairman and Managing Director, General Catalyst Partners. Interviewed by **David Grain**, Founder and Chief Executive Officer, Grain Management

4:50 PM

REMARKS from Joseph P. Kennedy III, United States Special Envoy to Northern Ireland for Economic Affairs

HAPPY HOUR WITH THE KENNEDY FAMILY

Join the Kennedy Family for happy hour and a tour of the historic Kennedy Compound, graciously hosted by Ted Kennedy, Jr. and his wife, Kiki Kennedy.

6:00 PM

WELCOME DINNER

Seating is pre-assigned. Dinner is generously sponsored by Patient Square Capital and Grain Management.



6:15 PM

PRESIDENT'S REMARKS

Kerry Kennedy, President, Robert F. Kennedy Human Rights

DINNER FIRESIDE

Dr. Laura Furmanski, Partner and Head of Patient Square Insights, Patient Square Capital. Interviewed by **R. Matthew Doherty**, Managing Director and Head of Alternative Capital Markets, Americas, Goldman Sachs.

8:30 PM

Shuttles will depart the Kennedy Compound to return guests to Chatham Bars Inn, Chatham Wayside Inn, and Queen Anne Inn.

9:30 PM

AFTER-DINNER PARTY HOSTED BY VISTA EQUITY PARTNERS

South Lounge, Chatham Bars Inn

Shuttles will be available for guests staying at Chatham Wayside Inn and Queen Anne Inn.



THURSDAY, JUNE 15

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 8:00 AM** *Breakfast will be available inside the Conference tent on the South Lawn.*
- 9:00 AM** **MORNING REMARKS**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights; Co-Chair, RFK Compass Investors Conference
- 9:05 AM** **DEEP DIVE: DIFFERENTIATING IN A CROWDED MARKET**
- PART ONE | FIRESIDE: BUILDING A NEW FUND IN TODAY'S ENVIRONMENT**
 A conversation with **David Perez**, Co-Founder and Managing Partner, Avance Investment Management. Interviewed by **Katie Moore**, Managing Director, Head of Emerging and Diverse-Led Investments, Hamilton Lane
- PART TWO | POSITIONING COMPANIES FOR GROWTH IN A TOUGH ECONOMY**
Jonathan Bilzin, Co-Chief Executive Officer, Towerbrook
Nazar Massouh, Chief Executive Officer and Co-Managing Partner, OIC
Roman Regelman, Chief Executive Officer, Securities Services and Digital, BNY Mellon
Willie Woods, Founder, President and Chief Executive Officer, IVC Partners
Gordon Woodward, Partner and Chief Investment Officer, Kohlberg & Co.
Moderator: Clodagh Coghlan, Principal, StepStone Group
- 10:25 AM** **THE FUTURE OF SECONDARIES AND GP-LED FUNDS**
Vincent Gombault, Managing Partner, Clipway
Steve Moseley, Managing Director, Wafra
Michael Zeleniuch, Managing Director, Private Equity Secondaries, Apogem Capital
Moderator: Mina Pacheco Nazemi, Head, Diversified Alternative Equity, Barings
- 11:10 AM** Networking Transition
- 11:30 AM** **INTERACTIVE SESSION WITH LIMITED PARTNERS**
 Facilitated by **Sancia Dalley**, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights; Co-Chair, RFK Compass Investors Conference

THURSDAY, JUNE 15

AFTERNOON PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 12:35 PM** **CLOSING REFLECTIONS**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights; Co-Chair, RFK Compass Investors Conference
- 12:45 PM** **NETWORKING LUNCH**
- 2:30 PM** *Shuttles will depart for networking excursions.*
- 3:00 PM** **NETWORKING EXCURSIONS**
Attendees can opt for Sailing with The Kennedys or Tour of the John F. Kennedy Museum – *pre-registration is required for both.*
- 5:00 PM** *Shuttles will return guests from excursion sites to Chatham Bars Inn, Chatham Wayside Inn, and Queen Anne Inn.*
- 6:30 PM** **COCKTAILS AND DINNER**
Casual networking, dinner, and music.
- 9:00 PM** *Shuttles will depart from Chatham Bars Inn to return guests staying at Chatham Wayside Inn and Queen Anne Inn.*

FRIDAY, JUNE 16

BOAT HOUSE, CHATHAM BARS INN

- 8:00 AM** **GUEST DEPARTURES**
A continental breakfast will be available inside the Boat House.