

RFK COMPASS SUMMER INVESTORS CONFERENCE

CHATHAM BARS INN AND
KENNEDY FAMILY COMPOUND

JUNE 13-15, 2022

ROBERT F.
KENNEDY
HUMAN
RIGHTS

COMPASS
INVESTORS



AGENDA



MONDAY, JUNE 13

PRE-CONFERENCE | CHATHAM BARS INN

1:00 PM **MEETING OF THE BOARD OF DIRECTORS ROBERT F. KENNEDY HUMAN RIGHTS**
Boat House

3:00 PM **CONFERENCE REGISTRATION OPENS**
Main Inn
Registration opens at Chatham Bars Inn for early arrivals.

5:30 PM *For guests staying at Ocean Edge Resort, shuttles will depart from Ocean Edge to bring you to Chatham Bars Inn.*

6:00 PM **PRE-CONFERENCE COCKTAILS**
SPONSORED BY KSL CAPITAL PARTNERS
South Lawn Tent



7:00 PM **PRE-CONFERENCE DINNER**
South Lawn Tent
Greetings from **Kerry Kennedy**, President, Robert F. Kennedy Human Rights
Remarks by **Marvin S. Rosen**, Shareholder, Greenberg Traurig and Board Member, Robert F. Kennedy Human Rights
Remarks by **Eric Resnick**, Chief Executive Officer, KSL Capital Partners

REDEFINING THE ROLE OF TREASURER IN TODAY’S SOCIOECONOMIC ENVIRONMENT

A Fireside Chat with **Tobias Read**, Treasurer, State of Oregon and **Shawn T. Wooden**, Treasurer, State of Connecticut. Interviewed by **John Studzinski**, Vice Chairman and Managing Director, PIMCO

9:30 PM *Shuttles will depart from Chatbars in to return guests staying at Ocean Edge Resort.*

TUESDAY, JUNE 14

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 6:30 AM** *For guests staying at Ocean Edge Resort, shuttles will depart from Ocean Edge to bring you to Chatham Bars Inn.*
- 7:15 AM** Breakfast will be available inside the Conference tent on the South Lawn
- 8:00 AM** **WELCOME REMARKS FROM CONFERENCE CO-CHAIRS**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights
Marvin S. Rosen, Shareholder, Greenberg Traurig and Board Member, Robert F. Kennedy Human Rights
- 8:20 AM** **BOARD CO-CHAIR REMARKS**
Frank Baker, Co-Founder & Managing Partner, Siris Capital and Co-Chair, Robert F. Kennedy Human Rights Board of Directors
- 8:30 AM** **OPENING FIRESIDE CHAT**
Gary Gensler, Chair, U.S. Securities and Exchange Commission. Interviewed by **Bob Pisani**, Senior Markets Correspondent, CNBC
- 9:05 AM** **MACRO OUTLOOK ON GLOBAL CAPITAL MARKETS AND ITS IMPACT ON PRIVATE EQUITY**
Tom Burger, Co-Founder and Managing Partner, Gridiron Capital
Stefan Kaluzny, Co-Founder and Managing Director, Sycamore Partners
Neil Randall, Managing Director, Head of Private Equity, Teacher Retirement System (TRS) of Texas
Eric Resnick, Co-Founder and Chief Executive Officer, KSL Capital Partners
Anastasia Titarchuk, Chief Investment Officer, New York State Common Retirement Fund

*Moderator: **John Haggerty**, Managing Principal and Director of Private Market Investments, Meketa Investment Group*
- 9:50 AM** **THE BOOM OF HEALTHCARE INVESTING – HOW INVESTORS BALANCE RETURNS, HEALTH EQUITY, ACCESS AND THE DIGITAL DIVIDE**
Alex Albert, Founding Partner, Patient Square Capital
Adam Blumenthal, Managing Partner and Chairman, Blue Wolf Capital
Adam Weinstein, Managing Director, New Mountain Capital

*Moderator: **Clifford H. Friedman**, Chair, Investment Committee, Northwell Health*

- 10:35 AM** **SPOTLIGHT: THE CHANGING WORLD ORDER OF GLOBAL ENERGY MARKETS**
Wil VanLoh, Founder and Chief Executive Officer, Quantum Energy Partners
- 10:55 AM** *Tea Break*
- 11:15 AM** **INTERACTIVE SESSION ON BUSINESS & HUMAN RIGHTS**
Facilitated by **Michael Posner**, Professor of Business & Society and Director, Center for Business & Human Rights, Stern School of Business, New York University
- 12:20 PM** **STRATEGIES FOR ALPHA: GAINING THE BEST RETURNS IN TODAY'S PRIVATE MARKETS**
Damien Dwin, Chief Executive Officer, Lafayette Square
Russell Gannaway, Managing Director and Portfolio Manager, PIMCO
Tony Lee, Co-Founder and Managing Partner, One Rock Capital Partners
Tagar Olson, Founder, Integrum Holdings
Jonathan Popielarski, Director, Private Assets, Employees' Retirement System of Rhode Island

Moderator: Michelle Davidson, Partner, Co-Head Advisory Americas, Aksia
- 1:05 PM** *Transition to Lunch and Fireside – seating is pre-assigned*
- 1:30 PM** **LUNCHEON KEYNOTE FIRESIDE CHAT**
Michael Fosnaugh, Co-Head of Flagship Fund, Vista Equity Partners.
Interviewed by **Michael Elio**, Partner, Private Equity, StepStone Group.
- 3:00 PM** *Shuttles will depart from the Main Inn at Chatham Bars Inn to take all guests to the Kennedy Compound for the afternoon programming and dinner.*

TUESDAY, JUNE 14

AFTERNOON PROGRAM | THE KENNEDY COMPOUND

4:00 PM **CREATING AN INCLUSIVE AND EQUITABLE ECONOMY FOR THE DIGNITY OF WORKERS**

Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights

FROM THE FRONTLINES: A WORKER'S PERSPECTIVE

Restaurant Worker

PANEL DISCUSSION

Thomas P. DiNapoli, Comptroller, State of New York

Saru Jayaraman, Founder, One Fair Wage and Director, Food Labor Research Center at University of California Berkeley

Brad S. Lander, Comptroller, City of New York

Moderator: Patrick Temple-West, Governance Reporter, Financial Times

5:45 PM **COCKTAIL RECEPTION**

The Home of Ted & Kiki Kennedy

Guests are invited to the cocktail reception to network with their fellow attendees and join Ted Kennedy, Jr. for a tour of The Kennedy Compound.

7:00 PM *Transition to Dinner – seating is pre-assigned*

7:15 PM **PRESIDENT'S REMARKS**

Kerry Kennedy, President, Robert F. Kennedy Human Rights

FIRESIDE CHAT: THE ROLE OF A.I IN SOCIETY

Lonne Jaffe, Managing Director, Insight. In conversation with **Vivienne Ming**, Co-Founder & Executive Chair, Socos Labs and Board Member, Robert F. Kennedy Human Rights

FIRESIDE CHAT: INVESTING WITH ETHICS AND ALPHA IN MIND

Valerie Jarrett, Chief Executive Officer, The Obama Foundation. In Conversation with **David Grain**, Founder and Chief Executive Officer, Grain Management.

10:00 PM *Shuttles will depart the Kennedy Compound to return guests to Chatham Bars Inn or to Ocean Edge Resort.*

11:00 PM **AFTER-DINNER PARTY HOSTED BY VISTA EQUITY PARTNERS**

Sacred Cod Tavern, Chatham Bars Inn

Shuttles will be available for guests staying at Ocean Edge Resort.





In June 2021, Robert F. Kennedy Human Rights and Red Lésbica Cattrachas won the historic case of Vicky Hernández et. al v. Honduras before the Inter-American Court of Human Rights, setting sweeping new protections for trans people across Latin America.

ROBERT F.
KENNEDY
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Scan this code to learn more



In September 2021, Robert F. Kennedy Human Rights and the Haitian Bridge Alliance provided emergency legal support to thousands of Haitian immigrants barred from seeking asylum and trapped in a militarized encampment in Del Rio, Texas. Six months later, we released a report describing the full scope of the human rights abuses that occurred and recommendations to ensure they are not repeated. Our advocacy to restore the right to seek asylum continues.

ROBERT F.
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WEDNESDAY, JUNE 15

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 7:00 AM** *For guests staying at Ocean Edge Resort, shuttles will depart from Ocean Edge to bring you to Chatham Bars Inn.*
- 8:00 AM** Breakfast will be available inside the Conference tent on the South Lawn
- 8:20 AM** **REMARKS**
Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights
Kerry Kennedy, President, Robert F. Kennedy Human Rights
- 8:40 AM** **FIRESIDE CHAT: NAVIGATING ECONOMIC AND POLITICAL RISKS**
A Conversation with **Saker Nusseibeh**, CBE, Chief Executive Officer, Federated Hermes and **Beth Van Schaack**, U.S. Ambassador-at-Large for Global Criminal Justice, U.S. Department of State

Moderator: Patrick Temple-West, Governance Reporter, Financial Times
- 9:15 AM** **INVESTMENT PERSPECTIVES ACROSS DIFFERENT SECTORS AND CAPITAL STRUCTURE**
Isela Bahena, Managing Director, Private Equity Infrastructure, TIAA/Nuveen
William "Bill" Costigan, Managing Director - Portfolio Management, Guggenheim Partners
Joe Dawson, Director of Private Equity, New York State Common Retirement Fund
Gabriel de Alba, Co-Founder and Managing Partner, GDA Luma
Manuel "Manny" D. Medina, Founder and Managing Partner, Medina Capital

Moderator: Clodagh Coghlan, Principal, Private Equity, StepStone Group
- 10:00 AM** **THE IMPACT OF INTEREST RATES AND INFLATION ACROSS PRIVATE EQUITY**
Aaron Gershenberg, Co-Founder and Managing Partner, SVB Capital
Jeff Krasnoff, Chief Executive Officer, Rialto Capital Management
Ashwin Krishnan, Managing Director and Co-Head, North America Private Credit, Morgan Stanley

Moderator: Christopher Smart, Chief Global Strategist and Head of Investment Institute, Barings

WEDNESDAY, JUNE 15

MORNING PROGRAM | SOUTH LAWN, CHATHAM BARS INN

10:45 AM

Tea Break

11:05 AM

BUILDING A FIRM IN A PANDEMIC - HOW EMERGING MANAGERS ARE FARING ON DUE DILIGENCE, FUNDRAISING AND OPERATIONS

Nicholas Antoine, Co-Founder and Managing Partner, Red Arts Capital
Georgia Clarke, Senior Manager, Pension Investments, Raytheon Technologies
Marc F. McMorris, Co-Chief Executive Officer & Co-Chair Investment Committee, Carrick Capital Partners
Jim Rutherford, Partner, BharCap Partners
Troy Williams, Managing Director, Achieve Partners

Moderator: **Katie Moore**, Managing Director and Head of Emerging & Diverse Manager Investing, Hamilton Lane

11:50 AM

GETTING SELECTIVE ON CO-INVESTMENTS, SECONDARIES AND CONTINUATION FUNDS – WHERE TO FIND VALUE AND HOW TO MITIGATE RISKS?

David Belluck, General Partner, Riverside Partners
Elizabeth Caldas, Investment Officer, Private Equity, United Nations Joint Staff Pension Fund
Michael Conley, Managing Director, Blue Owl Capital
Susanne Forsingdal, Managing Director, Head of the Americas, Allianz Capital Partners
Marcelia Freeman, Investor Relations and Product Management, Clearlake Capital

Moderator: **Mina Pacheco Nazemi**, Managing Director and Co-Head, Funds and Co-Investments, Barings

12:35 PM

ACHIEVING PROFIT AND IMPACT - CAN PRIVATE MARKETS DO BOTH?

Joe Aguilar, Chief Investment Officer, Illinois State Treasurer's Office
Vivianne Akriche, Managing Director, Eurazeo North America
Neha Champaneria Markle, Managing Director and Head of AIP Private Markets Solutions, Morgan Stanley
Nazar Massouh, Chief Executive Officer, Orion Infrastructure Capital
Candace Shaw, Senior Managing Director and Deputy Chief Investment Officer, Sun Life Capital Management

Moderator: **Michael Elio**, Partner, Private Equity, StepStone Group

WEDNESDAY, JUNE 15

AFTERNOON PROGRAM | SOUTH LAWN, CHATHAM BARS INN

- 1:20 PM** *Transition to Luncheon Keynote*
- 1:35 PM** **LUNCH AND KEYNOTE FIRESIDE CHAT**
 A conversation with **Yup S. Kim**, Head of Investments, CalPERS Private Equity and **David Gurtz**, Deputy Chief Investment Officer, Massachusetts Pension Reserves Investment Management (MassPRIM).

 Interviewed by **Barry Volpert**, Co-Founder and Chief Executive Officer, Crestview Partners; Board Member, Robert F. Kennedy Human Rights
- 2:30 PM** *Shuttles will depart for both 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 required.
- 5:00 PM** *Shuttles will return guests from excursion sites to both Chatham Bars Inn and the Ocean Edge Resort.*
- 6:30 PM** **NETWORKING COCKTAILS**
- 7:00 PM** **CLOSING DINNER**
- 9:00 PM** *Shuttles will depart from Chatham Bars Inn to return guests staying at Ocean Edge Resort.*

THURSDAY, JUNE 16

BEACH HOUSE GRILL, CHATHAM BARS INN

- 8:00 AM** **GUEST DEPARTURES**
 Breakfast sandwiches will be available inside the Beach House Grill.

SESSION SPEAKERS



MONDAY, JUNE 13

WELCOME REMARKS

7:00 PM | MONDAY, JUNE 13 | SOUTH LAWN, CHATHAM BARS INN



Kerry Kennedy
President,
Robert F. Kennedy
Human Rights

The seventh of Ethel and Robert F. Kennedy's eleven children, **Kerry Kennedy** has devoted more than 40 years to the pursuit of equal justice, the promotion and protection of basic rights, and the preservation of the rule of law. She works on a range of issues, including child labor, women's rights, disappearances, indigenous land rights, judicial independence, freedom of expression, ethnic violence, criminal justice reform, immigration, impunity, and environmental justice.

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.

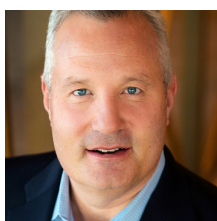
She is the proud mother of three daughters, Cara, Mariah, and Michaela. A human rights activist and lawyer, she authored New York Times best seller *Being Catholic Now*, as well as *Speak Truth to Power* and *Robert F. Kennedy: Ripples of Hope*.



Marvin S. Rosen
Shareholder,
Greenberg Traurig;
Board Member,
Robert F. Kennedy
Human Rights

Marvin S. Rosen practices in the area of corporate and securities law, advising private equity firms, hedge funds, and activist and distressed investors on special strategies. Rosen serves on the board of directors of Robert F. Kennedy Human Rights, the Howard Gilman Foundation, Roundabout Theatre Group, and Nikko Asset Management Americas, and he is on the board of Fusion Connect. He served as the budget and finance chairman for the Summit of the Americas, was the chairman of the Florida Housing Finance Agency, and was the finance chairman for the Democratic National Committee under President Bill Clinton. He served as a director of Terremark Worldwide Inc., until it was sold to

Verizon. Rosen received his B.S. in commerce from the University of Virginia, his L.L.B. from Dickinson School of Law, and his L.L.M. from New York University Law School.



Eric Resnick
Chief Executive Officer,
KSL Capital Partners

Eric Resnick is co-founder and CEO of KSL Capital Partners, a leading global private equity investment manager specializing in the travel and leisure industry. Since 2005, KSL has raised approximately \$18 billion of capital across dedicated equity, debt, and tactical opportunities funds.

KSL is deeply rooted in travel and leisure dating back to its predecessor company, KSL Recreation Corp., a portfolio company of KKR formed to make investments in hospitality, which Resnick joined in 2001 as CFO. Following the sale of KSL Recreation Corp. in 2004, Resnick co-founded KSL Resorts, a resort management company, which has managed some of the preeminent resort properties in the U.S. In 2005, he co-founded KSL Capital Partners with the vision to become the world's most successful and respected investor in the travel and leisure space. Resnick has since been involved in all facets of KSL's growth and development.

Resnick first merged his passion for outdoor adventure and travel with his profession when he joined Vail Resorts in 1996, serving as vice president, strategic planning and investor relations, and treasurer through 2001. Previously, he had served as a consultant for McKinsey & Company.

Resnick is a member of the Industry Real Estate Financing Advisory Council, the World Travel and Tourism Council, and Real Estate Roundtable. He holds a B.A. with distinction in mathematics and economics, Phi Beta Kappa, from Cornell University. Resnick, his wife, Sara, and their three children reside in Denver and Vail, Colo., where they enjoy an active outdoor lifestyle and are deeply embedded in local philanthropic initiatives and the ski community. His daughters are members of the U.S. Ski Team and compete internationally.

FIRESIDE CHAT: REDEFINING THE ROLE OF TREASURER IN TODAY'S SOCIOECONOMIC ENVIRONMENT

Interviewed by **John Studzinski**, Vice Chairman and Managing Director, PIMCO

7:10 PM | MONDAY, JUNE 13 | SOUTH LAWN, CHATHAM BARS INN



Tobias Read
Treasurer,
State of Oregon

Elected Oregon's 29th state treasurer in 2016, **Tobias Read** oversees the state's diversified institutional portfolio, which totaled \$118 billion at the end of December 2020. This portfolio consists of several funds and trust funds, including the Oregon Public Employee Retirement Fund, the State Accident Insurance Fund, the Oregon Common School Fund, the Oregon Short Term Fund, and smaller funds on behalf of agencies and universities.

A collaborative problem-solver who draws upon his management, political, and finance policy experience, Read was elected to the Oregon House of Representatives in 2006, where he served for a decade. He championed legislation to invest in public education, improve state financial management, finance critical infrastructure improvements, and 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 of the House Committee on Higher Education, Innovation, and Workforce Development. He also served on the House Revenue Committee in multiple legislative sessions and was a member of the Joint Committee on Ways and Means, the primary budget-writing body for the legislature.

While a house member, Read pushed to strengthen the state's rainy-day fund, which was a

key factor that helped the state 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 its kids. Read led efforts to promote infrastructure projects using innovative public-private partnerships, and he was a chief sponsor of the Oregon Investment Act, which streamlined lottery investments in promising Oregon startups. In 2015, he 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 it will allow hundreds of thousands more Oregonians to retire with dignity after a lifetime of work.

Read earned his bachelor's degree from Willamette University and his MBA from the Michael G. Foster School of Business at the University of Washington. He has been a volunteer for Start Making a Reader Today (SMART), a youth sports coach, a member of the Willamette University Athletic Director's Advisory Board, and a founding board member of Hoopla, Oregon's largest three-on-three charity basketball tournament. He lives in Beaverton with his wife, Heidi Eggert, and their two children.



John Studzinski
Vice Chairman and
Managing Director,
PIMCO

John Studzinski is the vice chairman and managing director of PIMCO, where he helps advance PIMCO's global strategy and serves as a key strategic advisor to many clients around the world. Prior to joining PIMCO in 2018, he was vice chairman, investor relations and business development, and a senior managing director at Blackstone, overseeing sovereign and institutional investor relationships and advising large family offices. Studzinski was previously head of European investment banking at Morgan Stanley and deputy chairman of Morgan Stanley International.

Studzinski is the co-founder of the Arise Foundation, which partners with local networks to stop human trafficking, and he is a board member of Robert F. Kennedy Human Rights and vice chair emeritus of Human Rights Watch. He is also founder and chairman of the Genesis Foundation, a U.K.-based charity that supports young artists. He has 33 years of investment experience and holds an MBA from the University of Chicago and a bachelor's degree from Bowdoin College. In 2008, the Queen's New Year's Honors List named him Commander of the British Empire (CBE) for services to the arts and charity.



Shawn T. Wooden
Treasurer, State of
Connecticut

Shawn T. Wooden was sworn in as Connecticut's state treasurer on January 9, 2019, following his successful 21-year career as an investment attorney and public service as president of the Hartford City Council. He is currently president of the National Association of State Treasurers, the bipartisan organization of state treasurers and public finance officials across the United States, and the nation's foremost authority on responsible state treasury programs and related financial practices, policies, and education. Wooden is the sole trustee of the \$47 billion Connecticut Retirement Plans and Trust Funds, administers a \$26 billion debt management program, and manages over \$259 billion in annual cash transactions. He has a seat on 25 quasi-governmental authorities, boards, and commissions related to housing, finance, student loans, air and water sports, venture capital, the lottery, private sector retirement security, and other key policy areas.

Born and raised in Hartford, Wooden participated in a desegregation busing program to attend public school. Graduating with honors, he earned a four-year academic scholarship to Trinity College. He later attended New York University School of Law before moving back to his hometown to begin his legal career at Day Pitney. Wooden has been a fierce advocate for closing the wealth gap,

improving financial literacy, reducing gun violence, protecting workers, and advancing diversity, equity, and inclusion in the financial services industry.

In September 2020, moved by the murder of George Floyd and the reaction to his widely published op-ed calling on corporate America to get off the sidelines, Wooden launched the Corporate Call to Action: Coalition for Equity & Opportunity (CCA) in partnership with the Ford Foundation. The coalition now consists of 18 of the leading financial institutions in the United States, representing more than 725,000 employees and \$26 trillion in assets under management. The mission of the CCA is to address racial economic inequality within the financial services industry as well as in communities of color that have historically been underbanked, underrecognized, and underfunded. During the 2021 legislative session, Wooden proposed and championed the passage of a first-in-the-nation CT Baby Bonds law. CT Baby Bonds is an anti-generational poverty, racial equity, and economic growth program inspired by Professor Darrick Hamilton of the New School's Institute on Race, Power and Political Economy.

Wooden is the only Black elected state treasurer in the country and the only Black elected official serving statewide in New England.

TUESDAY, JUNE 14

CONFERENCE CO-CHAIRS WELCOME

8:00 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Sancia Dalley
Senior Vice President,
Investor Engagement
and Strategic
Partnerships,
Robert F. Kennedy
Human Rights

Sancia Dalley is senior vice president of investor engagement and strategic partnerships at Robert F. Kennedy Human Rights, where she leads the RFK Compass Investors Program, a network of 400 institutional investors, asset managers, and investment consultants who collectively control close to \$7 trillion in assets under management in private markets and who are committed to ESG, DEI and capital allocation, supporting worker rights, and defending democracy.

Dalley has over 15 years of experience working with and representing the private sector in global and regional forums. She was an early employee with a startup impact nonprofit created by former U.S. Ambassador to the United Nations Richard Holbrooke as a private sector call to action in the heights of the HIV/AIDS and malaria pandemics. Working directly with Fortune 500 CEOs, Dalley mobilized companies and leaders to deploy their collective financial resources, products, core competencies, and influence in hard-hit areas of Africa, the Caribbean, and Asia to provide lifesaving health products and services during a time when

corporate social responsibility, impact investing, and ESG efforts were not mainstream. Her international development experience includes helping to broker a landmark public-private partnership investment of \$30 million from Chevron Corporation to the Global Fund to Fight HIV/AIDS, Tuberculosis and Malaria; overseeing the private sector delegation to the Roll Back Malaria Partnership and Global Fund, and launching many advocacy initiatives including the Emmy Award-winning “Get Tested” public service announcement with the Kaiser Family Foundation and the National Basketball Association.

A thought leader on the role of the private sector to positively impact and influence society, Dalley’s articles have appeared in major platforms including CNN Opinion, the Washington Post, Pensions & Investments, and the New York Times Dealbook. Dalley has a bachelor’s degree in international relations, French, and photography from Wesleyan College in Macon, Ga., and serves on multiple boards including the Center for Active Design in New York, Casoro Group Education Fund in Austin, Texas, and the Boardwalk Village Foundation in Jamaica.



Marvin S. Rosen
Shareholder,
Greenberg Traurig;
Board Member,
Robert F. Kennedy
Human Rights

Marvin S. Rosen practices in the area of corporate and securities law, advising private equity firms, hedge funds, and activist and distressed investors on special strategies. Rosen serves on the board of directors of Robert F. Kennedy Human Rights, the Howard Gilman Foundation, Roundabout Theatre Group, and Nikko Asset Management Americas, and he is on the board of Fusion Connect. He served as the budget and finance chairman for the Summit of the Americas, was the chairman of the Florida Housing Finance Agency, and was the finance chairman for the Democratic National Committee under President Bill Clinton. He served as a director

of Terremark Worldwide Inc., until it was sold to Verizon. Rosen received his B.S. in commerce from the University of Virginia, his L.L.B. from Dickinson School of Law, and his L.L.M. from New York University Law School.

BOARD CO-CHAIR REMARKS

8:20 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN

SESSIONS



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

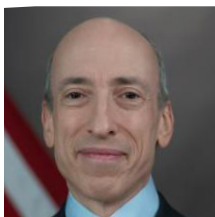
Frank Baker is a co-founder and managing partner of Siris Capital Group, a middle-market private equity firm focused on deep value, control-equity investments around special situations in the telecom, technology, and technology-enabled business service sectors. Together with Peter Berger and Jeffrey Hendren, he launched Siris in 2011 and helped establish the firm's investment strategy, which focuses on driving value creation in mature technology companies with mission-critical products and services that are facing industry changes or other significant transitions. Since its founding, Siris has raised more than \$5.9 billion of cumulative capital commitments over three institutional funds, and Baker has helped oversee the firm's platform equity investments and non-control investments.

Prior to forming Siris, Baker was a managing director at Ripplewood Holding, a global private equity firm. He started his career in investment banking at Goldman Sachs in the mergers and acquisitions group. Baker has an MBA from Harvard Business School and a B.A. from the University of Chicago. He is a trustee of the University of Chicago, and he has been a major supporter of the university's New Leaders Odyssey Scholarships. Baker is also co-chairman of Robert F. Kennedy Human Rights and a board member of Sponsors for Educational Opportunity.

FIRESIDE CHAT: GARY GENSLER, CHAIR, U.S. SECURITIES AND EXCHANGE COMMISSION

Interviewed by **Bob Pisani**, Senior Markets Correspondent, CNBC

8:30 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Gary Gensler
Chair, U.S. Securities
and Exchange
Commission

Gary Gensler was nominated by President Joseph R. Biden to Chair the U.S. Securities and Exchange Commission on February 3, 2021, confirmed by the U.S. Senate on April 14, 2021, and sworn into office on April 17, 2021.

Before joining the SEC, Gensler was professor of the Practice of Global Economics and Management at the MIT Sloan School of Management, co-director of MIT's Fintech@CSAIL, and senior advisor to the MIT Media Lab Digital Currency Initiative. From 2017-2019, he served as chair of the Maryland Financial Consumer Protection Commission.

Gensler was formerly chair of the U.S. Commodity Futures Trading Commission, leading the Obama Administration's reform of the \$400 trillion swaps market. He also was senior advisor to U.S. Senator Paul Sarbanes in writing the Sarbanes-Oxley Act (2002), and was undersecretary of the

Treasury for Domestic Finance and assistant secretary of the Treasury from 1997-2001. In recognition for his service, he was awarded the Alexander Hamilton Award, the U.S. Treasury's highest honor. He is a recipient of the 2014 Frankel Fiduciary Prize.

Prior to his public service, Gensler worked at Goldman Sachs, where he became a partner in the Mergers and Acquisitions Department, headed the firm's Media Group, led fixed income and currency trading in Asia, and was co-head of finance, responsible for the firm's worldwide controllers and treasury efforts. A native of Baltimore, Gensler earned his undergraduate degree in economics in 1978 and his MBA in 1979 from the Wharton School of the University of Pennsylvania. He has three daughters.



Bob Pisani
Senior Markets
Correspondent, CNBC

A CNBC reporter since 1990, **Bob Pisani** has covered Wall Street and the stock market for 24 years. Pisani covered the real estate market for CNBC from 1990 to 1995, then moved on to cover corporate management issues before becoming on-air stocks editor in 1997. In addition to covering the global stock market, he also covers initial public offerings (IPOs), exchange-traded funds (ETFs), and financial market structure for CNBC.

In 2017, Pisani was honored with a lifetime achievement award from the Security Traders Association of New York for "dedication to the Association and the Industry." In 2013, he won third place in the National Headliner Awards in the business and consumer reporting category for

his documentary on the diamond business, *The Diamond Rush*. In 2014, Pisani was recognized by the Market Technicians Association with an award for "steadfast efforts to integrate technical analysis into financial decision making, journalism, and reporting." In 2010, he was designated a Webby Award honoree by the International Academy of Digital Arts and Sciences for best business blog.

Prior to joining CNBC, Pisani learned the real estate business from his father, Ralph Pisani, a retired real estate developer. They co-authored *Investing in Land: How to Be a Successful Developer* and together taught a course in real estate development at the Wharton School of the University of Pennsylvania from 1987 to 1992.

MACRO OUTLOOK ON GLOBAL CAPITAL MARKETS AND ITS IMPACT ON PRIVATE EQUITY

Moderated by **John Haggerty**, Managing Principal and Director of Private Market Investments, Meketa Investments Group
9:05 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Tom Burger
Co-Founder and
Managing Director,
Gridiron Capital

Tom Burger is co-founder and managing director of Gridiron Capital. In addition to his leadership and management responsibilities, Burger is a member of the Investment Committee and focuses on new investment opportunities, due diligence, and value creation at current portfolio companies. He serves on the boards of AML RightSource, Class Valuation, Erie, Foundation Wellness, Jacent Strategic Merchandising, Leaf Home, The Service Companies, Travel Nurse Across America, and Vertical Supply Group. Burger previously served on the boards of multiple Gridiron Capital partners, including Dent Wizard, Electronic Systems Protection, Engage2Excel, Legality, McKenzie Sports Products, Motion Recruitment Partners, PAS Technologies, Performance Health, Quality Solutions, and Rough Country.

Burger has over 33 years of relevant experience, with 28 years of acquiring and building middle-market companies. He spent five years in manufacturing operations, marketing, project management, cost benchmarking, strategy, and management consulting. Prior to co-founding Gridiron Capital, he was a managing director of RFE Investment Partners and Butler Capital Corporation,

where he acquired and built middle-market companies in the services, specialty consumer, and manufacturing markets. Previously, Burger worked as a consultant and project manager with the Boston Consulting Group out of its Chicago office. Prior to BCG, Burger was with General Electric as a manufacturing and marketing manager, a technology project consultant, and a global sourcing manager in GE's Manufacturing Management Program. Burger began his career working in his family's manufacturing business.

Burger received a B.S.E. in mechanical engineering and materials science from Duke University, where he played varsity football and was a member of the Atlantic Coast Conference Academic Honor Roll. He was president of the Duke chapter of the NCAA Volunteers for Youth, a big brothers/big sisters program matching Duke athletes with Durham children in need. He holds an MBA from the Wharton School of the University of Pennsylvania. Originally from central Pennsylvania, Burger resides with his family in New Canaan, Conn.



John A. Haggerty
Managing Principal
and Director of Private
Market Investments,
Meketa Investments
Group

John A. Haggerty is the managing principal and director of private market investments at Meketa, an independent, full-service investment consulting and advisory firm. In this position, Haggerty manages senior teams, consults with clients, conducts macro- and investment-level research, and serves on limited partner advisory boards. He is chair of Meketa's Private Markets Policy Committee and Private Markets Research Committee as well as a member of the firm's ESG Investing Committee and board of directors. Haggerty holds a B.A. from Cornell University and is a CFA charterholder.



Stefan Kaluzny
Co-Founder and
Managing Director,
Sycamore Partners

Stefan Kaluzny is a co-founder and managing director of Sycamore Partners, a New York-based private equity firm specializing in consumer, distribution, and retail-related investments. The firm has approximately \$10 billion in aggregate committed capital from an investor base composed of leading endowments, financial institutions, family offices, pension plans, and sovereign wealth funds.

Before joining Sycamore Partners, Kaluzny was a managing director at Golden Gate Capital, which he was with from its inception in 2000 until January

2011. Prior to that, Kaluzny was co-founder and CEO of Delray Farms, a Hispanic specialty food company, and he has held positions at consulting firms Bain & Company and LEK.

Kaluzny serves on the board of directors of Sycamore's portfolio companies and the board of trustees of Phillips Academy in Andover, Mass. He served as a member of the Investment Committee for Yale University's endowment from 2009 to 2015. He has an MBA from Harvard Business School (Baker Scholar) and a B.A. in history from Yale.



Neil Randall
Managing Director,
Head of Private Equity,
Teacher Retirement
System of Texas

Neil Randall is the managing director of the private equity team at the Teacher Retirement System (TRS) of Texas. In this role, he has primary responsibility for a \$30 billion private equity portfolio, is the chair of the Private Equity Investment Committee, and serves on the TRS-wide Management Committee. Randall was a member of the ILPA Board of Directors from 2014 to 2021, serving as chair from 2019 to 2021.

Before joining TRS in 2007, Randall was at Convergent Investors, an early-stage venture capital firm. At Convergent, he focused on evaluating new investments as well as portfolio management, which included acting as the director of business development for one of its portfolio companies, TeraVista Technologies. Previously, he worked in the Enterprise Systems Group at Dell. Randall holds a B.B.A. and an M.S. in finance from Texas A&M University.



Eric Resnick
Chief Executive Officer,
KSL Capital Partners

Eric Resnick is co-founder and CEO of KSL Capital Partners, a leading global private equity investment manager specializing in the travel and leisure industry. Since 2005, KSL has raised approximately \$18 billion of capital across dedicated equity, debt, and tactical opportunities funds.

KSL is deeply rooted in travel and leisure dating back to its predecessor company, KSL Recreation Corp., a portfolio company of KKR formed to make investments in hospitality, which Resnick joined in 2001 as CFO. Following the sale of KSL Recreation Corp. in 2004, Resnick co-founded KSL Resorts, a resort management company, which has managed some of the preeminent resort properties in the U.S. In 2005, he co-founded KSL Capital Partners with the vision to become the world's most successful and respected investor in the travel and leisure space. Resnick has since been involved in all facets of KSL's growth and development.

Resnick first merged his passion for outdoor adventure and travel with his profession when he joined Vail Resorts in 1996, serving as vice president, strategic planning and investor relations, and treasurer through 2001. Previously, he had served as a consultant for McKinsey & Company.

Resnick is a member of the Industry Real Estate Financing Advisory Council, the World Travel and Tourism Council, and Real Estate Roundtable. He holds a B.A. with distinction in mathematics and economics, Phi Beta Kappa, from Cornell University. Resnick, his wife, Sara, and their three children reside in Denver and Vail, Colo., where they enjoy an active outdoor lifestyle and are deeply embedded in local philanthropic initiatives and the ski community. His daughters are members of the U.S. Ski Team and compete internationally.



Anastasia Titarchuk
Chief Investment
Officer, New York
State Common
Retirement Fund

Anastasia Titarchuk is the chief investment officer for New York State's Common Retirement Fund, valued at \$258.1 billion as of March 2021, which holds assets in trust for more than 1 million employees and retirees from the state and local authorities. Before Titarchuk's appointment in 2018, she had served as deputy CIO since 2015. Under the direction of State Comptroller Thomas P. DiNapoli, Titarchuk is responsible for developing and implementing investment strategies to ensure that the fund remains one of the best-funded and best-managed public pension plans in the country.

Titarchuk started her career on Wall Street in 1998. Prior to joining the fund, she worked in a variety of leadership roles at Bank of America, Barclays Capital and Lehman Brothers, and JP Morgan. Titarchuk was born in Moscow and moved to the U.S. as a teenager. She graduated summa cum laude from Yale University with a B.S. in applied mathematics. Titarchuk currently resides in Connecticut with her husband and 3-year-old daughter Ella.

THE BOOM OF HEALTHCARE INVESTING – HOW INVESTORS BALANCE RETURNS, HEALTH EQUITY, ACCESS AND THE DIGITAL DIVIDE

Moderated by **Clifford H. Friedman**, Chair, Investment Committee, Northwell Health

9:50 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Alex Albert
Founding Partner,
Patient Square Capital

Alex Albert is a founding partner of Patient Square Capital. Albert has over 15 years of investment and acquisition experience. Prior to joining Patient Square, he was a partner at Ares Management, where he served as the co-head of health care within the Private Equity Group. Prior to joining Ares in 2014, Albert was a vice president at FFL Partners. Earlier in his career, he was an associate in private equity at KKR, where he worked on the health care industry team. In addition, Albert was an analyst in the Investment Banking Division at Goldman Sachs from 2005 to 2007.

Albert is currently a board member and on the executive committee of the Healthcare Private Equity Association. Most recently, Albert served on the board of directors of the parent entities of DuPage Medical Group, National Veterinary Associates, Ob Hospitalist Group, and Unified Women's Healthcare. Albert holds a B.A. in economics, magna cum laude, from Vanderbilt University, an M.A. in quantitative methods from Columbia University, and an M.Phil. in economics from Oxford University. Albert is a CFA charterholder.



Adam Blumenthal
Managing Partner and
Chairman, Blue Wolf
Capital Partners

Adam Blumenthal is founder, managing partner and chairman at Blue Wolf Capital Partners. 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, Twin Rivers Paper Company, Elara Caring, Fox Rehabilitation, ClearSky Health, RHA Health Services, KDB, and Colson Group.

From 2011 through 2017, Blumenthal was an independent trustee and chair of the investment committee of the UAW Retiree Medical Benefits Trust. This \$60 billion fund pays retiree health benefits for over 700,000 UAW employees of Ford, Chrysler, and General Motors.

Prior to founding Blue Wolf, Blumenthal served as first deputy comptroller and chief financial officer from 2002 to 2005, with oversight of the city's pension system. During his tenure, the city's pension assets increased from \$65 billion to \$85 billion, primarily as a result of strong investment

gains. Prior to that, from 1989 to 2002, Blumenthal built and managed American Capital Ltd., a publicly-traded buyout and mezzanine fund (NASDAQ: ACAS). During that time, Blumenthal played a central role in building the company from an unfunded start-up into a publicly-traded company with over \$1 billion invested in 63 middle-market companies at the time of his departure.

Blumenthal received a B.A., magna cum laude, from Harvard College and an MBA from the Yale School of Management. 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 and a lecturer in the Practice of Management at the Yale School of Management (SOM). 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.



Clifford H. Friedman
Chair, Investment
Committee,
Northwell Health

Clifford H. Friedman is the co-founder, chairman, and CEO of ShareNett. Friedman has a history of 40 years of private equity, venture capital, investment management, financial, and various senior operational roles with a focus on media, communications, technology, and fintech. He has served on over 30 private and public corporate boards, raised capital, and supported strategic negotiations in the United States, the U.K., Italy, Spain, Japan, Sweden, Germany, France, Brazil, Mexico, and seven Gulf Cooperation Council countries. Friedman is particularly skilled in value creation through a systematic process of working with management teams, board members, and customers, creating and negotiating strategic partnerships globally to drive revenue and profitability that positions companies for successful liquidity events for all stakeholders.

From 2014 to 2020, Friedman was a managing director and member of the management committee of Raptor Group Holdings, a private investment company backed by the Family Office of Jim Pallotta, the former vice chairman of Tudor Investments. Prior to this role, Friedman was managing director and founding partner at Highbridge Principal Strategies, Constellation Growth Capital. Friedman also served as a senior vice president of Universal Studios, where he was responsible for the creation and development of the studio's New Media Group.

Before joining Universal Studios, Friedman served as vice president for strategic development at NBC, leveraging existing franchises to create new business opportunities. While at NBC, he helped form the joint venture between NBC and Microsoft (MSNBC) and formulated NBC's Latin American strategy.

Currently, Friedman is the chairman of Huntington Hospital; director of the board of trustees and community advisory board of Northwell Health System; member of the System Investment Committee; and chairman of the Private Equity Committee. As chairman Friedman is responsible for allocating \$300 million annually into various private equity funds and, more recently, direct co-investments, with AUM expected to cross over \$1 billion within the next several years.

Friedman earned a B.S. in electrical engineering and computer science and an M.S. in electrophysics from NYU Tandon School of Engineering (Polytechnic University), and an MBA in finance and investments from Adelphi University. He has been awarded two patents in the field of communications and has been published in various international technical and financial journals. He is also a co-inventor of patent-pending systems and methods for trading, clearing, and settling securities transactions using blockchain technology. Additionally, he taught several undergraduate and graduate engineering classes as an adjunct professor



Adam Weinstein
Managing Director, New
Mountain Capital

Adam Weinstein is the managing director of New Mountain, which he joined in 2005. He serves as the head of firm operations and chief financial officer and helps oversee and manage the firm overall with the founder/CEO. On a day-to-day basis, he helps drive strategy and investment process, oversee the team, and steer the firm overall. In addition, Weinstein helps to oversee all non-investment team members including finance, operations, compliance, human resources, legal, and administration across the firm and its business lines. He is involved with portfolio company oversight and business development/marketing, spending significant time with the firm's investors. He also serves as an executive vice president and is on the board of

directors of New Mountain Finance Corporation, a publicly traded business development company and two private equity portfolio companies: Western Dental and Citrin Cooperman. He previously worked at Deloitte & Touche in that firm's merger and acquisition and private equity investor services areas, with clients that included large and small blue-chip private equity and venture capital firms.

Weinstein is a New York State certified public accountant and received his B.S., summa cum laude, from Binghamton University. He is involved with and sits on the boards of various professional and philanthropic organizations.

THE CHANGING WORLD ORDER OF GLOBAL ENERGY MARKETS

A Spotlight Talk by **Wil VanLoh**, Founder and CEO, Quantum Energy Partners
10:35 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Wil VanLoh
Founder, CEO and
Chairman, Quantum

Wil VanLoh founded Quantum Energy Partners in 1995 and now serves as CEO and chairman of its Investment Committee and Operating Committee. He also is a member of QLCP's Investment Committee. Prior to founding Quantum, VanLoh founded Windrock Capital, an energy investment banking firm specializing in raising private equity for and providing merger, acquisition, and divestiture advice to private energy companies. Early in his career, VanLoh worked in the energy investment banking groups of Kidder, Peabody & Co. and NationsBank.

VanLoh is an active civic leader, currently serving on the board of trustees of Baylor College of Medicine, the board of visitors of the MD Anderson Cancer Center, and the board of directors of Family Legacy, and as chairman of the investment committee of the Kingdom Giving Fund. VanLoh holds a B.B.A. in finance from Texas Christian University.

INTERACTIVE SESSION ON BUSINESS & HUMAN RIGHTS

Facilitated by **Michael Posner**, Professor of Business & Society and Director, Center for Business & Human Rights, Stern School of Business, New York University
11:15 AM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Michael H. Posner,
Professor of Business
& Society and Director,
Center for Business &
Human Rights, Stern
School of Business,
New York University

Michael H. Posner is a professor of business and society at NYU's Stern School of Business, where he is working to launch the first center on business and human rights at a business school. Prior to joining NYU Stern, Posner served in the Obama administration as assistant secretary of state for the Bureau of Democracy, Human Rights, and Labor at the State Department from 2009 to 2013. Prior to his appointment, he led Human Rights First, a New York-based human rights advocacy organization. Posner is recognized as a leader and expert in advancing a rights-based approach to national security, challenging the practice of torture, combating discrimination, and advocating for refugee protection.

Throughout his career, Posner has been a prominent voice in support of human rights protections in global business operations in the manufacturing supply chain, the extractives industry, and the information and communications technology sector. As a member of the White House Apparel Industry Partnership Task Force in the mid-1990s, Posner helped found the Fair Labor Association, which brings together corporations, local leaders, universities, and nongovernmental

organizations to promote corporate accountability for working conditions in the apparel industry. He was a founding member of the multistakeholder Global Network Initiative, aimed at promoting free expression and privacy rights on the internet, and he has spoken widely on the issue of internet freedom.

Posner spearheaded the U.S. government's efforts to enhance the effectiveness of the Voluntary Principles on Security and Human Rights, which works to improve human rights around oil, gas, and mining operations. Posner also played a key role in developing the first U.S. law providing for political asylum, which became part of the Refugee Act of 1980, as well as the Torture Victim Protection Act, adopted in 1992. In 1998, he led the Human Rights First delegation to the Rome conference at which the statute of the International Criminal Court was adopted. Before joining Human Rights First, Posner was a lawyer with Sonnenschein Nath & Rosenthal in Chicago. A member of the California and Illinois bars, he received a B.A. with distinction and honors in history from the University of Michigan and a J.D. from the University of California, Berkeley Law School.

STRATEGIES FOR ALPHA: GAINING THE BEST RETURNS IN TODAY'S PRIVATE MARKETS

SESSIONS

Moderated by **Michelle Davidson**, Partner, Co-Head, Advisory Americas, Aksia
12:20 PM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Michelle Davidson,
Partner, Co-Head,
Advisory Americas,
Aksia

Michelle Davidson is co-head of Advisory Americas at Aksia and has over 34 years of financial services experience, with more than 29 years focused exclusively on private equity. She helps oversee the firm's North America Portfolio Advisory team, focusing on program governance, strategy allocation, and portfolio construction, in addition to supporting the ongoing management of alternative investment programs. Davidson has extensive experience in all aspects of private equity investment, including portfolio management, strategic program development, and being a member of partnership-advisory committees

Davidson was a co-founder of TorreyCove Capital Partners, which Aksia later acquired, where she worked in a similar capacity and managed the firm's client advisory activities. Prior to that, Davidson was a managing director at Pacific Corporate Group. During her 12-year tenure, she was strategically involved in the construction of CalPERS's first private equity program, including both partnership and direct investments, and represented Pacific Corporate Group on the Private Equity Steering Committee for the UN Principles for Responsible Investment.



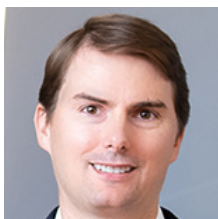
Damien Dwin
Chief Executive Officer,
Lafayette Square

Damien Dwin is the chief executive officer of Lafayette Square. He founded Lafayette in November 2020 as a model investment platform that deploys services-backed capital to local communities, independent businesses, and diverse investors. Lafayette Square is built for inclusion—here to change the financing paradigm and investing in an American economy worth believing in. Lafayette Square provides a wide range of financial products that create positive impact alongside financial returns. In 2010, Dwin co-founded Brightwood Capital Advisors and served as its co-CEO until October 2020.

the North American Special Opportunities business until 2010. At Credit Suisse, Dwin served on the Vice President Selection Committee and led the Fixed Income Division Credit Training Program.

Dwin began his career as a trader with Goldman Sachs, New York and London, where he earned the Michael P. Mortara Award for Innovation. He further developed his investment expertise working for Credit Suisse, where he was co-founder and head of

Dwin is an active thought leader on mass incarceration, economic inclusion, racial justice and representation, and the use of purpose and profit for good. He has written for Entrepreneur and Inc.com. A committed philanthropist, Dwin currently serves as chair of the board of trustees for Vera Institute of Justice. He also serves on the nonprofit boards of the Children's Hospital of Philadelphia, the Studio Museum in Harlem, the National Trust for Historic Preservation, Woodberry Forest School, and the Boys' Club of New York. Dwin received a B.S./B.A. from Georgetown University, where he later served two terms on the board of regents.



Russell Gannaway
Managing Director
and Portfolio Manager,
PIMCO

Russell Gannaway is a managing director and portfolio manager in the New York office of PIMCO. He is a senior member of the tactical opportunities portfolio management team and a member of various investment committees across PIMCO's alternative credit and private strategies platform. Prior to joining PIMCO in 2009, he served as an associate

with JER Partners in New York. He has specialized in commercial real estate and commercial mortgage-backed securities (CMBS), including mezzanine loans, B notes, and CMBS B pieces. Gannaway has 18 years of investment experience and holds an undergraduate degree in business administration from the University of Georgia.



Tony Lee
Co-Founder and
Managing Partner, One
Rock Capital Partners

Tony Lee is a co-founder and managing partner of One Rock Capital Partners. Previously, Lee was a managing director at Ripplewood Holdings, which he joined in 1997, and was responsible for Ripplewood's efforts in the global chemicals and industrial sectors. Prior to that, Lee worked in the mergers and acquisitions group at Salomon Brothers in New York. Lee earned an A.B. in economics from Harvard College and serves on the Board of the National Association of Investment Companies.



Tagar Olson,
Founder, Integrum
Holdings

Tagar Olson is a founder of Integrum and co-chair of its Investment Committee. Olson has over 20 years of investment and acquisition experience, most recently during an 18-year career at KKR, where he was involved in numerous transactions valued at more than \$50 billion in the aggregate.

Olson joined KKR in 2002 and was promoted to lead the financial services team for the Americas Private Equity platform in 2011. At KKR, he participated as a member of the firm's Investment Committee and Portfolio Management Committee within its Americas Private Equity business. He also served as a member of KKR's Inclusion and Diversity Committee and its Investments, Markets, and Distribution Committee, KKR's most senior governance body. During his time leading the financial services practice, KKR was one of the most active private equity acquirers of large financial services and business services companies in the

world. Olson was involved in KKR investments, including Alliant Insurance Services, First Data (now Fiserv), Focus Financial, Mr. Cooper, Latitude Financial Services, Nephila, PURE, Resolution, Sedgwick, and USI Insurance Services. Olson also led KKR's hospitality and leisure sector, where he was involved with KKR's investments in Apple Leisure Group, KSL Recreation, Hotel del Coronado, and La Costa Resort and Spa.

Prior to joining KKR, Olson was with Evercore Partners, where he was involved in a number of private equity transactions and mergers and acquisitions. He is a member of the board of overseers at NYU Langone Medical Center and is co-founder of the DHPS Foundation, a charitable organization dedicated to the research and treatment of rare genetic diseases. He holds a B.S. and a bachelor of applied science, summa cum laude, from the University of Pennsylvania.



Jonathan Popielarski
Director of Private
Assets, Employees
Retirement System of
Rhode Island

Jon Popielarski is the director of private assets at the Employee's Retirement System of the State of Rhode Island (ERSRI), a \$10.4 billion defined benefit plan. The private asset portfolios include private equity, private credit, and private real assets. Prior to joining ERSRI in 2013, he worked as a business development associate at Hastings Equity Partners, a lower middle market industrial focused private equity fund.

LUNCHEON FIRESIDE WITH MICHAEL FOSNAUGH, CO-HEAD OF FLAGSHIP FUND, VISTA EQUITY PARTNERS

Interviewed by **Michael Elio**, Partner, Private Equity, StepStone Group
1:30 PM | TUESDAY, JUNE 14 | SOUTH LAWN, CHATHAM BARS INN



Michael Fosnaugh
 Co-Head of Flagship Fund, Vista Equity Partners

Michael Fosnaugh joined Vista Equity Partners in 2005 and is co-head of the Chicago office. He is co-head of the Flagship Fund and sits on its Investment Committee. Additionally, Fosnaugh serves as a member of Vista's Executive Committee, the firm's governing and decision-making body for matters affecting its overall management and strategic direction, and Vista's Private Equity Management Committee, the firm's decision-making body for matters affecting Vista's overall private equity platform. He sits on the boards of Acquia, Alegeus, Applause, CentralSquare, EAB, Greenway Health, Integral Ad Science, Jamf, Ping Identity, PlanSource, SmartBear, Stats Perform, and TripleLift. He was also actively involved in the firm's

investments in Advicent, Forcepoint, Mediaocean, MRI Software, Numerator, SirsiDynix, Sunquest Information Systems, Websense, and Zywave.

Prior to joining Vista, Fosnaugh worked in the Technology, Media, and Telecommunications Group at SG Cowen & Co., where he focused on the software, services, and financial technology sectors and advised clients on buy-side and sell-side transactions, public and private equity financings, and other strategic advisory initiatives. Fosnaugh earned his A.B. in economics cum laude from Harvard University.



Michael Elio
 Partner, Private Equity, StepStone Group

Michael Elio is a research partner based in New York and is co-head of the middle/large market buyout team and head of the secondaries funds sector teams at StepStone. He is also responsible for portfolio construction and management for many of the firm's largest advisory clients, SMA clients, and high-net-worth distribution platforms.

Prior to StepStone, Elio was a managing director at Institutional Limited Partners Association, where he led programs around research, standards, and industry strategic priorities. Prior to that, 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.

CREATING AN INCLUSIVE AND EQUITABLE ECONOMY FOR THE DIGNITY OF WORKERS

Introduction by **Sancia Dalley**, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights

Moderated by **Patrick Temple-West**, Governance Reporter, Financial Times

4:30 PM | TUESDAY, JUNE 14 | THE KENNEDY COMPOUND



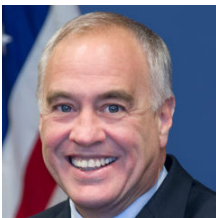
Sancia Dalley
Senior Vice President,
Investor Engagement
and Strategic
Partnerships,
Robert F. Kennedy
Human Rights

Sancia Dalley is senior vice president of investor engagement and strategic partnerships at Robert F. Kennedy Human Rights, where she leads the RFK Compass Investors Program, a network of 400 institutional investors, asset managers, and investment consultants who collectively control close to \$7 trillion in assets under management in private markets and who are committed to ESG, DEI and capital allocation, supporting worker rights, and defending democracy.

Dalley has over 15 years of experience working with and representing the private sector in global and regional forums. She was an early employee with a startup impact nonprofit created by former U.S. Ambassador to the United Nations Richard Holbrooke as a private sector call to action in the heights of the HIV/AIDS and malaria pandemics. Working directly with Fortune 500 CEOs, Dalley mobilized companies and leaders to deploy their collective financial resources, products, core competencies, and influence in hard-hit areas of Africa, the Caribbean, and Asia to provide lifesaving health products and services during a time when

corporate social responsibility, impact investing, and ESG efforts were not mainstream. Her international development experience includes helping to broker a landmark public-private partnership investment of \$30 million from Chevron Corporation to the Global Fund to Fight HIV/AIDS, Tuberculosis and Malaria; overseeing the private sector delegation to the Roll Back Malaria Partnership and Global Fund, and launching many advocacy initiatives including the Emmy Award-winning “Get Tested” public service announcement with the Kaiser Family Foundation and the National Basketball Association.

A thought leader on the role of the private sector to positively impact and influence society, Dalley’s articles have appeared in major platforms including CNN Opinion, the Washington Post, Pensions & Investments, and the New York Times Dealbook. Dalley has a bachelor’s degree in international relations, French, and photography from Wesleyan College in Macon, Ga., and serves on multiple boards including the Center for Active Design in New York, Casoro Group Education Fund in Austin, Texas, and the Boardwalk Village Foundation in Jamaica.



Thomas P. DiNapoli
Comptroller,
State of New York

Thomas P. DiNapoli is the 54th comptroller of the State of New York. In 1972, he 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. He attended Hofstra University, graduating magna cum laude with a bachelor’s degree in history in 1976. He worked in the telecommunications industry for 10 years, and went to night classes and earned a master’s degree from the New School University’s Graduate School of Management and Urban Professions.

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. DiNapoli was elected state comptroller in 2007 by a bipartisan majority of the state legislature. He was elected comptroller by New York’s voters in 2010, 2014, and 2018. DiNapoli is known for his integrity, independence and even-keeled leadership. A lifelong Long Islander, he 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.

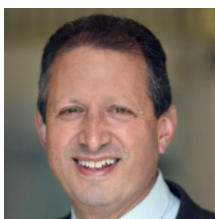


Saru Jayaraman,
Founder, One Fair Wage and Director, Food Labor Research Center at University of California Berkeley

Saru Jayaraman is the president of One Fair Wage and director of the Food Labor Research Center at the University of California, Berkeley. After 9/11, together with displaced World Trade Center workers, she co-founded the Restaurant Opportunities Center, which grew into a national movement of restaurant workers, employers, and consumers. She then launched One Fair Wage as a national campaign to end all subminimum wages in the United States.

Jayaraman was listed among CNN's top 10 visionary women and recognized as a champion of change by the White House in 2014, won a James Beard Foundation Leadership Award in 2015, and was named visionary of the year by the San

Francisco Chronicle in 2019. She is the author of the forthcoming *One Fair Wage: Ending All Subminimum Pay in America* as well as *Behind the Kitchen Door*, *Forked: A New Standard for American Dining*, and *Bite Back: People Taking on Corporate Food and Winning*. She has appeared on MSNBC, HBO, PBS, CBS, and CNN, and she attended the Golden Globes in January 2018 with Amy Poehler as part of the Time's Up action to address sexual harassment. Jayaraman is a graduate of Yale Law School and the Harvard Kennedy School of Government.



Brad Lander
Comptroller of the City of New York

New York City comptroller **Brad S. Lander** was elected to serve as the city's budget watchdog and chief accountability officer in November 2021. Lander's background in community organizing and urban planning informs his work to make government work better for all New Yorkers. First elected to the New York City Council in 2009, Lander co-founded the council's Progressive Caucus, and he has a strong track record of partnering with community advocates to win transformative change for a more just and equitable city.

In the city council, Lander spearheaded efforts to protect workers and build a more equitable economy, working closely with labor advocates to push for groundbreaking laws to end unfair firings and establish a fair workweek for fast-food workers, protect freelancers from wage theft, ban discriminatory credit checks for employment, and guarantee a living wage for app-based drivers and delivery workers.

Lander's hard-hitting reports and campaigns have led to better bus service and to air conditioning for all New York City school classrooms, and have restored hundreds of millions of dollars for affordable housing. He helped lead a successful

grassroots effort to desegregate the middle schools of Community School District 15 (which serves students from Carroll Gardens, Park Slope, Red Hook, and Sunset Park) and partnered with advocates and legislators to combat discriminatory stop-and-frisk policing.

A longtime champion of inclusive and transparent government, Lander helped bring participatory budgeting to the city to give residents a voice in how city government invests in their neighborhoods. Throughout his work, Lander has taken an innovative, data-driven, and collaborative approach to tackling some of the city's biggest challenges, from reckless driving to infrastructure investments.

Lander was one of the founders of Local Progress, now a 1,000-member network of local elected officials advancing a racial and economic justice agenda through all levels of local government. Prior to holding public office, Lander spent 15 years in the nonprofit sector as the director of the Fifth Avenue Committee and the Pratt Center for Community Development. He lives in Brooklyn with his wife, Meg Barnette, president and CEO of NonProfit New York, and their children, Marek and Rosa.



Patrick Temple-West
Governance Reporter, Financial Times

Patrick Temple-West is a journalist at the Financial Times in New York covering environmental, social, and governance (ESG) and sustainability issues. He has written recently about asset managers, rulemakers in the ESG sector, such as the Sustainable Accounting Standards Board, and sustainable investing deals involving biofuels and recyclable coffee cups.

Before joining the Financial Times, Temple-West covered financial regulations in Washington, D.C., and he reported from Brazil, Nigeria, Taiwan, and Turkey. Earlier in his career, he was a correspondent for Reuters.

WELCOME DINNER

7:15 PM | TUESDAY, JUNE 14 | THE KENNEDY COMPOUND



Kerry Kennedy
President,
Robert F. Kennedy
Human Rights

The seventh of Ethel and Robert F. Kennedy's eleven children, **Kerry Kennedy** has devoted more than 40 years to the pursuit of equal justice, the promotion and protection of basic rights, and the preservation of the rule of law. She works on a range of issues, including child labor, women's rights, disappearances, indigenous land rights, judicial independence, freedom of expression, ethnic violence, criminal justice reform, immigration, impunity, and environmental justice.

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.

She is the proud mother of three daughters, Cara, Mariah, and Michaela. A human rights activist and lawyer, she authored New York Times best seller *Being Catholic Now*, as well as *Speak Truth to Power* and Robert F. Kennedy: *Ripples of Hope*.

IN CONVERSATION: THE ROLE OF A.I IN SOCIETY



Lonne Jaffe
Managing Director,
Insight Partners

Lonne Jaffe is a managing director at Insight Partners, a global software investor partnering with high-growth technology, software, and internet startup and scale-up companies that are driving transformative change in their industries. Insight Partners has invested in more than 600 companies worldwide and has seen over 55 portfolio companies achieve an IPO. Headquartered in New York City, with offices in London, Tel Aviv, and Palo Alto, Insight's mission is to find, fund, and work successfully with visionary executives, providing them with practical, hands-on software expertise to foster long-term success.

Jaffe was previously the CEO of Insight portfolio company Syncsort (now part of Precisely), which he joined in 2013 after serving as the senior vice president for corporate strategy at CA Technologies. Prior to CA, Jaffe spent over a decade at IBM, where he led a number of sizable software acquisitions and held various technology strategy and operating executive roles. Jaffe received undergraduate and master's degrees from Harvard University.



Vivienne Ming
Co-Founder & Chief
Executive Officer,
Socos Labs

Vivienne Ming explores maximizing human capacity as a theoretical neuroscientist, delusional inventor, and demented author. Over her career she's founded six startups and been chief scientist at two others, and she launched the "mad science incubator" at Socos Labs, where she explores seemingly intractable problems—from a lone child's disability to global economic inclusion—for free. As the co-founder and chief scientist of Dionysus Health, she applies machine learning to lessen the corrosive health effects of chronic stress in communities. She also develops tools for learning at home and in school and TBI, models of bias in hiring and

promotion, and neurotechnologies to treat dementia, an outgrowth of her research at UC Berkeley's Redwood Center for Theoretical Neuroscience. In her free time, Ming designs AI systems to treat her son's diabetes, predict manic episodes in bipolar sufferers, and reunite orphan refugees with extended family members. For relaxation, she writes science fiction and spends time with her wife and children. Ming was named one of 10 women to watch in tech by Inc. and one of the BBC's 100 Women in 2017. She is featured frequently for her research and inventions in the Financial Times, The Atlantic, Quartz, and the New York Times.

FIRESIDE CHAT: INVESTING WITH ETHICS AND ALPHA IN MIND



Valerie Jarrett
Chief Executive Officer,
The Barack Obama
Foundation

Valerie Jarrett is chief executive officer and a member of the board of directors of the Barack Obama Foundation, as well as a senior distinguished fellow at The University of Chicago Law School. From 2009 to 2017, Jarrett was the senior advisor to President Barack Obama, making her the longest serving senior advisor to a president in history. In this position, she oversaw the Offices of Public Engagement and Intergovernmental Affairs and Chaired the White House Council on Women and Girls. Jarrett has a background in both the public and private sectors. She served as the chief executive officer of The Habitat Company in Chicago, the commissioner of Planning and Development for the city of Chicago, deputy chief of staff for Chicago Mayor Richard M. Daley, and she practiced law for ten years in the private and public sector. Jarrett also served as the director of numerous corporate and not-for-profit boards including leadership roles as chairman of the Board of the Chicago Stock

Exchange, chairman of the University of Chicago Medical Center Board of Trustees, vice chairman of the University of Chicago Board of Trustees, director of the Federal Reserve Bank of Chicago and chair of Chicago Transit Board.

Jarrett is the author of the New York Times best-selling book *Finding My Voice: My Journey to the West Wing and the Path Forward*, published in April 2019. Currently, she serves as chairman of the board of Civic Nation and co-chair of The United State of Women. Jarrett is also on the boards of Walgreens Boot Alliance, Inc., Ralph Lauren Corporation, Lyft, Inc., Sweetgreen, Ariel Investments, The John F. Kennedy Center for Performing Arts, The Innocence Project, Sesame Street Workshop and the Economic Club of Chicago. Jarrett is a member of Goldman Sachs' One Million Black Women Advisory Board and is a senior advisor to ATTN. She received her B.A. from Stanford University and her J.D. from the University of Michigan Law School.



David Grain
Founder and Chief
Executive Officer,
Grain Management

David Grain is the CEO of Grain Management, the sector-focused private equity firm he founded. Established in 2006 and headquartered in Washington, D.C., Grain Management invests globally in the communications industry. The firm serves some of the nation's largest institutional investors and has consistently generated top-quartile returns through a data-driven investment process and innovative financial structures that have transformed the communications industry, including the first asset-backed securitizations of cellular communication towers and radio frequency spectrum licenses.

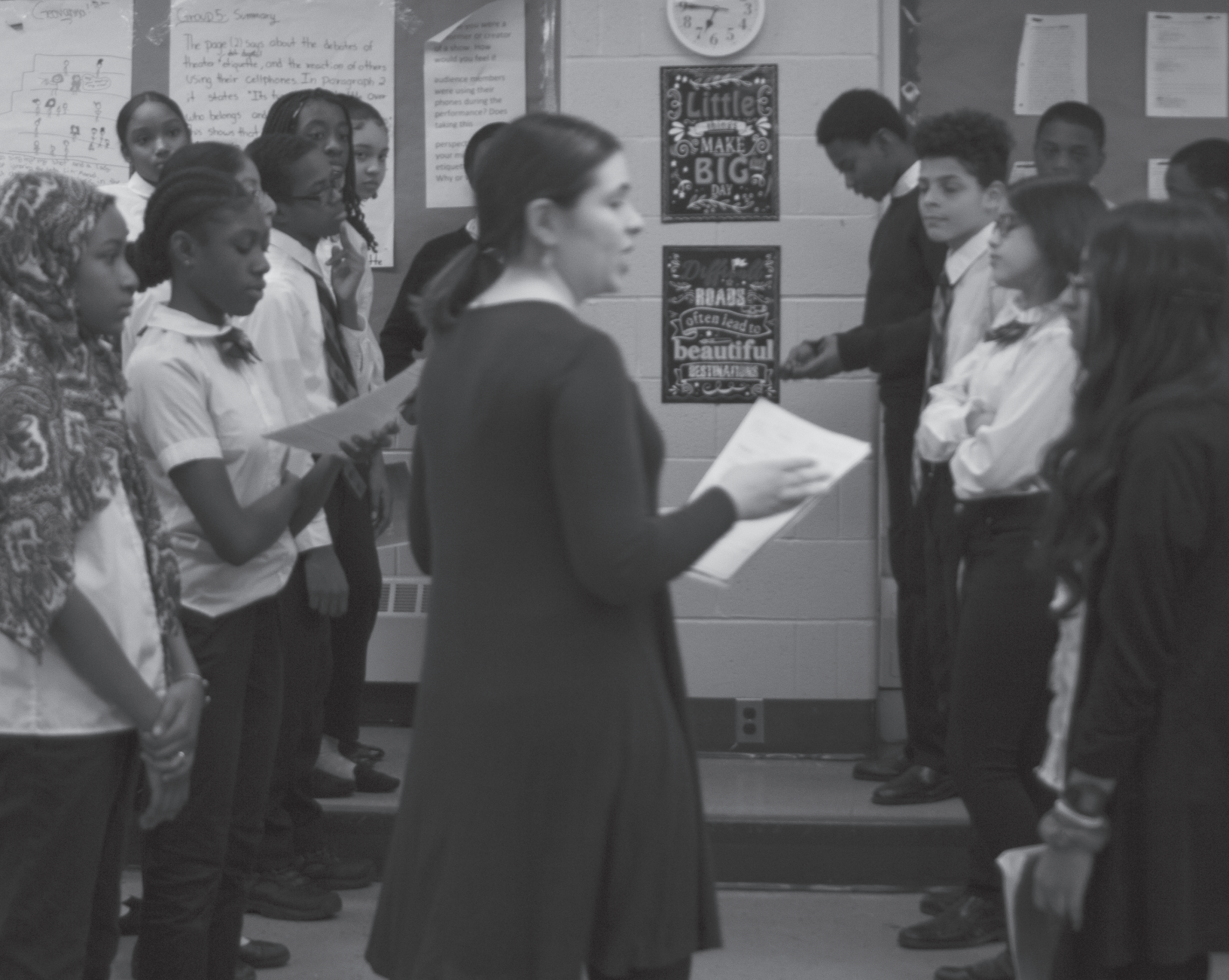
From 2002 to 2005, Grain led Pinnacle Towers (later renamed Global Signal) from bankruptcy to a successful IPO, transforming it into one of the largest independent wireless communication tower companies in the world. As president of Global Signal, Grain grew the organization's footprint to a total of 13,000 sites covering all 50 states, Canada, and the United Kingdom. In 2006, GSL was sold to Crown Castle International for \$5.7 billion. This transaction delivered a capital return of more than 15 times to private equity investors and more than three and a half times to IPO investors.

Prior to joining Global Signal, Grain served as senior vice president of AT&T Broadband's New England region and was an executive director in the High Yield Finance Department at Morgan Stanley in New York, where he focused primarily on global telecommunications, media, and technology companies. Grain was appointed to the board of directors of Southern Company in 2012, where

he is chair of the Finance Committee and serves on the Compensation Committee. He became a director of New Fortress Energy in 2019 and of Dell Technologies in 2021. Grain is a trustee of the Brookings Institution, a member of the advisory council of the National Museum of African American History and Culture, and a member of the board of the Martha's Vineyard Museum.

As an active participant in civic affairs, Grain received a presidential appointment to the National Infrastructure Advisory Council, where he chaired the Critical Infrastructure Security and Resilience National R&D Plan. In September 2009, Florida's governor appointed Grain to the State Board of Administration's Investment Advisory Council, where he served as chairman. While in New England, Grain was named by the treasurer of Massachusetts to the state's Pension Reserves Investment Management Board, overseeing the state's employee pension fund, and he subsequently chaired the Investment Committee. He is a lifetime member of the Council on Foreign Relations and Business Executives for National Security and was recently inducted into the American Academy of Arts and Sciences.

Grain earned his MBA from the Amos Tuck School of Business at Dartmouth College, where he serves on the board of advisors. He also served for eight years as a trustee of College of the Holy Cross, where he received his B.A. Grain is an active philanthropist, particularly in the areas of education, social justice, and the arts. He shares two children, Chelsea and David Jr., with his wife of 29 years, Lisa.



Our Speak Truth to Power program engages former world leaders, like former first lady of Ukraine Kateryna Yushchenko, in a virtual speaker series where panelists discuss pressing global events and the need for international dialogue with high school students.

ROBERT F.
KENNEDY
HUMAN
RIGHTS



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Human rights don't end at the workplace door. Workplace Dignity reimagines how people should be valued and treated at work, equipping organizations and their leaders with strategies and tools that allow all workers to truly thrive, no matter the work they do or where they do it.

ROBERT F.
KENNEDY
HUMAN
RIGHTS



Scan this code to learn more

WEDNESDAY, JUNE 15

DAY 2 REMARKS

8:20 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



Sancia Dalley
Senior Vice President,
Investor Engagement
and Strategic
Partnerships,
Robert F. Kennedy
Human Rights

Sancia Dalley is senior vice president of investor engagement and strategic partnerships at Robert F. Kennedy Human Rights, where she leads the RFK Compass Investors Program, a network of 400 institutional investors, asset managers, and investment consultants who collectively control close to \$7 trillion in assets under management in private markets and who are committed to ESG, DEI and capital allocation, supporting worker rights, and defending democracy.

Dalley has over 15 years of experience working with and representing the private sector in global and regional forums. She was an early employee with a startup impact nonprofit created by former U.S. Ambassador to the United Nations Richard Holbrooke as a private sector call to action in the heights of the HIV/AIDS and malaria pandemics. Working directly with Fortune 500 CEOs, Dalley mobilized companies and leaders to deploy their collective financial resources, products, core competencies, and influence in hard-hit areas of Africa, the Caribbean, and Asia to provide lifesaving health products and services during a time when

corporate social responsibility, impact investing, and ESG efforts were not mainstream. Her international development experience includes helping to broker a landmark public-private partnership investment of \$30 million from Chevron Corporation to the Global Fund to Fight HIV/AIDS, Tuberculosis and Malaria; overseeing the private sector delegation to the Roll Back Malaria Partnership and Global Fund, and launching many advocacy initiatives including the Emmy Award-winning “Get Tested” public service announcement with the Kaiser Family Foundation and the National Basketball Association.

A thought leader on the role of the private sector to positively impact and influence society, Dalley’s articles have appeared in major platforms including CNN Opinion, the Washington Post, Pensions & Investments, and the New York Times Dealbook. Dalley has a bachelor’s degree in international relations, French, and photography from Wesleyan College in Macon, Ga., and serves on multiple boards including the Center for Active Design in New York, Casoro Group Education Fund in Austin, Texas, and the Boardwalk Village Foundation in Jamaica.



Kerry Kennedy
President,
Robert F. Kennedy
Human Rights

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FIRESIDE CHAT: NAVIGATING ECONOMIC AND POLITICAL RISKS

Moderated by **Patrick Temple-West**, Governance Reporter, Financial Times
8:40 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN

SESSIONS



Saker Nusseibeh
CBE; CEO,
Federated Hermes

Saker Nusseibeh is chief executive officer of Federated Hermes and a member of the Federated Hermes, Inc. executive team. He was appointed CEO in November 2011 after joining the firm in June 2009 as CIO. Prior to this, Nusseibeh was global head of equities at Fortis Investments, having initially been appointed to the firm as CIO Global Equities in 2005. Before this, he was CIO of Global Equities and head of marketing for SGAM UK. This role followed SGAM's acquisition of Trust Company of the West, where Nusseibeh was a managing director, running global and international strategies and managing TCW's London office. He started his career at Mercury Asset Management in 1987.

Nusseibeh is the founder of the 300 Club, a group of leading CIOs and investment professionals who seek to challenge investment orthodoxy. He was an inaugural member of the CFA Institute's Future of Finance Advisory Council from 2015 until 2019. He is a member of the Value Reporting Foundation Council, the International Finance Corporation, the FCA-PRA Climate Financial Risk Forum, the Institute for Fiscal Studies, and the UN Environmental Programme Financial Initiative

Steering Committee. He sits on the FSCB, formerly the Banking Standards Board, which was created as a result of a parliamentary inquiry to restore trust in the U.K. banking industry, and on the UN Business and Human Security Initiative Advisory Board. Nusseibeh also served on the U.K. National Advisory Board and became a founding member of the Impact Investing Institute on Impact Investing. He is a member of the Chancellor's Circle of St. Mary's University and is on the advisory board of the National Youth Orchestra.

Nusseibeh was named CEO of the year at the Global Investor Investment Excellence Awards in 2015, and CEO of the year at the Financial News Asset Management Europe Awards in 2018. More recently, Nusseibeh was named European personality of the year for 2020 at the Funds Europe Awards and was awarded a Commander of the Order of the British Empire (CBE) in the Queen's 2020 New Year's Honours list for services to responsible business and finance. He has a B.A. and Ph.D. in medieval history from King's College, University of London.



Beth Van Schaack
Ambassador-at-
Large for Global
Criminal Justice, U.S.
Department of State

Dr. Beth Van Schaack was sworn in as the State Department's sixth ambassador-at-large for global criminal justice (GCJ) on March 17, 2022. In this role, she advises the secretary of state and other department leadership on issues related to the prevention of and response to atrocity crimes, including war crimes, crimes against humanity, and genocide.

Van Schaack served as deputy to the ambassador-at-large in GCJ from 2012 to 2013. Prior to returning to public service in 2022, Van Schaack was the Leah Kaplan Visiting Professor in Human Rights at Stanford Law School, where she taught international criminal law, human rights, human trafficking, and a policy lab on legal and policy tools for preventing atrocities. In addition, she directed Stanford's International Human Rights and Conflict Resolution Clinic. Van Schaack began her academic career at Santa Clara University School of Law, where, in

addition to teaching and writing on international human rights issues, she served as the academic adviser to the U.S. interagency delegation to the International Criminal Court Review Conference in Kampala, Uganda. Earlier in her career, she was a practicing lawyer at Morrison & Foerster; the Center for Justice and Accountability, a human rights law firm; and the Office of the Prosecutor of the International Criminal Tribunals for Rwanda and the Former Yugoslavia in The Hague.

Van Schaack has published numerous articles and papers on international human rights and justice issues, including her 2020 thesis, "Imagining Justice for Syria" (Oxford University Press). From 2014 to 2022, she served as executive editor for Just Security, an online forum for the analysis of national security, foreign policy, and rights. She holds a B.A. from Stanford University, a J.D. from Yale University, and a Ph.D. from Leiden University.



Patrick Temple-West
Governance Reporter,
Financial Times

Patrick Temple-West is a journalist at the Financial Times in New York covering environmental, social, and governance (ESG) and sustainability issues. He has written recently about asset managers, rulemakers in the ESG sector, such as the Sustainable Accounting Standards Board, and sustainable investing deals involving biofuels and recyclable coffee cups.

Before joining the Financial Times, Temple-West covered financial regulations in Washington, D.C., and he reported from Brazil, Nigeria, Taiwan, and Turkey. Earlier in his career, he was a correspondent for Reuters.

INVESTMENT PERSPECTIVES ACROSS DIFFERENT SECTORS AND CAPITAL STRUCTURE

Moderated by **Clodagh Coghlan**, Principal, Private Equity, StepStone Group
9:15 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



Isela Bahena
Managing Director,
TIAA/Nuveen

Isela Bahena is the managing director of infrastructure investments at Nuveen, a TIAA Company. Bahena brings over 20 years of investment and portfolio management experience across a variety of sectors and asset classes. She leads deal teams that originate, structure, and invest across the infrastructure spectrum, including renewable, digital infrastructure, transportation, and energy transition assets. She led the infrastructure portfolio's largest transportation asset on behalf of TIAA and a consortium of international institutional investors. Bahena serves on several boards for investments in Europe and North America, including toll roads, digital communications, and energy infrastructure sectors, and she holds several LP advisory roles.

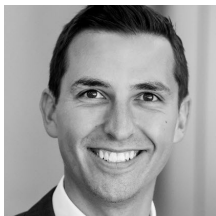
Bahena's previous experience includes investing across the capital structure and through various structures, which include private equity funds, co-investments, mezzanine, and private placement debt. Before joining TIAA-CREF in 2004, Bahena was responsible for public finance and general middle-market lending and underwriting at Bank of America. Bahena holds a B.S. in economics from the University of Illinois at Urbana-Champaign and an MBA from Duke University's Fuqua School of Business. Bahena, her husband, Michael, and their rescue dog Raisin love to hike, travel, and enjoy the cultural venues of New York City. They enjoy working with entrepreneurs, startups, and nonprofits in their spare time.



Clodagh Coghlan
Principal, Private Equity,
StepStone Group

Clodagh Coghlan is a principal on StepStone's private equity team, focusing on co-investment transactions and U.S.-based small-market managers. StepStone is a global private markets firm overseeing \$570 billion of capital allocations, including \$134 billion in assets under management. StepStone's strategy integrates fund, secondary, direct, and co-investments across private markets to create solutions that are customized according to the objectives of any private markets investment program.

Prior to joining StepStone, Coghlan worked in the Private Fund Group at Credit Suisse, focusing on secondary transactions across the private equity sector, as well as primary fundraising. Coghlan graduated with honors with a double major in French and international business from Georgetown University, where she was a starting member of the university's NCAA Division I varsity field hockey team.



William "Bill" Costigan
Managing Director -
Portfolio Management,
Guggenheim Partners

William "Bill" Costigan joined Guggenheim in 2013. He serves as a managing director of the Institutional Client Group. Previously, he was a senior member of the portfolio management team focused on active fixed income strategies, specifically core plus, multi-asset, and structured credit mandates. Costigan, a regular speaker at national investment conferences who has over 15 years of financial services experience, spent five years as an investment banker at KeyBank in New York and Seattle, focusing on the origination,

structuring, and syndication of leveraged buyouts. He then developed investment solutions for institutional investors at the Vanguard Investment Group prior to joining Guggenheim Partners. Costigan earned an M.B.A. from Loyola Marymount University and a B.S. in economics from John Carroll University.

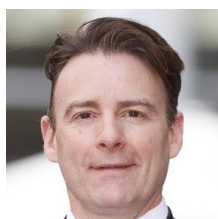


Joe T. Dawson
Director of Private
Equity, New York
Common Retirement
Fund

Joe Dawson is the director of private equity for the New York Common Retirement Fund (CRF). He is responsible for facilitating the management as well as strategic planning and development of the private equity portfolio across all sub-asset classes, including primary funds and co-investments. He has been instrumental in growing and expanding the private equity portfolio to become one of the largest in the industry, equating to approximately \$35 billion in total value. Dawson has overseen the introduction of new initiatives across the organization, including strategic partnerships and economic participation transactions. He held several roles within the CRF prior to being elevated to

director in 2021 and serves on the limited partner advisory boards for a number of private equity fund relationships.

Prior to joining the CRF, Dawson was a senior consultant for a startup entity that provided advisory services to small business enterprises throughout metropolitan New York. His prior experience also includes corporate finance and fixed income roles at Ernst & Young and Lehman Brothers, respectively. Dawson received a B.S. in business administration from Florida A&M University, and he holds an MBA from the Wharton School at the University of Pennsylvania.



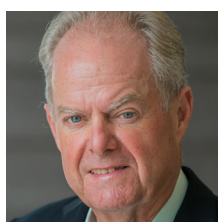
Gabriel de Alba
Co-Founder and
Managing Partner,
GDA Luma

Gabriel de Alba is the co-founder and managing partner of GDA Luma Special Opportunities Fund. De Alba has more than 25 years of experience in investing and in operating and leading corporate boards. He specializes in control and/or influence of investments in distressed and undervalued situations, formulating a strategy around recapitalization, cash flow generation, and ESG/digital transformation. He focuses on technology, hospitality, pharma/health care, media, telecom, and consumer discretionary sectors. Additionally, de Alba has raised five funds and managed over \$6 billion worth of assets.

De Alba serves as chairman of Cirque du Soleil, executive chairman of Gateway Casinos &

Entertainment Limited, and chairman of Frontera Energy Corporation. Recently, he also served as chairman of Geneva Properties, chairman and CEO of Cable Satisfaction International Inc./Cabovisão, and director of World Color.

De Alba was the recipient of the 2020 Leadership Achievement Award and 2018 Global Private Equity Growth Deal Maker of the Year in the leadership achievement category. He is fluent in five languages, holds a double B.S. in finance and economics from NYU Stern School of Business and an MBA from Columbia University, and has completed graduate courses in mathematics and computer science at Harvard University.



Manuel "Manny" D. Medina
Founder and Managing
Director, Medina Capital

Manuel "Manny" D. Medina, the founder and managing partner of Medina Capital, has more than 30 years of experience as a highly successful businessman with expertise in areas including technology, finance, international business, and government contracting. He has a track record of successfully raising funds across the entire capital structure during periods of rapid change in the macroeconomic environment, and he has raised over \$1 billion for companies, significantly increasing value and providing growth to enterprises through all types of economic climates.

Medina is also the founder and chairman of the board of eMerge Americas, the premier B2B 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 he 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. Medina's leadership in the IT industry and insightful analysis of market trends have resulted in appearances on CNBC, Bloomberg TV, and Fox Business as well as interviews with internationally recognized media outlets on topics such as the rising adoption of cloud computing, cybersecurity, and the dynamics driving key government IT initiatives.

Medina currently serves as chairman at Cyxtera Technologies and executive chairman of Appgate; both are Medina Capital portfolio companies.

THE IMPACT OF INTEREST RATES AND INFLATION ACROSS PRIVATE EQUITY

Moderator: **Christopher Smart**, Chief Global Strategist, Head of Investment Institute, Barings

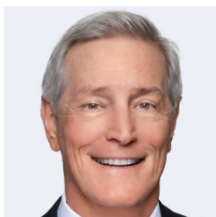
10:00 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



Aaron Gershenberg
Managing Partner and
Founder, SVB Capital

Aaron Gershenberg is a founder and managing partner of SVB Capital. Gershenberg joined SVB in 1999 and has been part of the venture capital ecosystem since 1996. Over the last 20 years, he has created 9 fund of funds, 4 direct funds, and 5 differentiated custom solutions as an extension of the company's limited partners' teams. Gershenberg's expertise is evaluating venture capital investments 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 US and Overseas. Prior to joining SVB, Gershenberg opened FirstCorp's Northern California office, a venture leasing group focused on early-stage companies, and was responsible for providing venture financing to more than 50 startup technology companies.

Gershenberg began combining his passion for cycling and philanthropy in 1984, cycling from Boston to Los Angeles and raising over \$200,000 for Oxfam America. He is a founder of the Hearst Castle Best Buddies ride, a 100-mile ride from Carmel to Hearst Castle benefiting the intellectually and developmentally disabled. Since 2003, he has led Team SVB and raised over \$3M for Best Buddies and serves on the International Board. Gershenberg has been an Ambassador for the sport of kiteboarding since 2000. He has introduced numerous entrepreneurs and investors to the sport, creating community around the globe. Gershenberg graduated from Wesleyan University with a B.S. in economics and African studies and earned a master's degree in finance and public policy from the John F. Kennedy School of Government at Harvard University. He currently resides in Park City, Utah.



Jeff Krasnoff
Chief Executive
Officer, Rialto
Management Group

Jeff Krasnoff is chief executive officer of Rialto Management Group, formed in 2007 to capitalize on investment opportunities in the commercial real estate sector. Today, Rialto is an integrated investment and asset management platform investing and managing throughout the capital structure in real estate properties, loans and securities. In addition to investing its own capital, Rialto manages a number of private equity vehicles and has overseen investments with other partners, including pension funds, endowments, insurance companies, family offices, financial institutions, sovereigns, and government agencies. With over 40 years of experience in commercial and residential real estate investment, finance, management and servicing, Mr. 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, serving as its president since its spin off from Lennar Corporation 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 2005. Krasnoff joined Lennar in 1986 and from 1990 until the spin off, he was responsible for the oversight of Lennar's commercial real estate 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.



Ashwin Krishnan
Managing Director,
Co-Head, North America
Private Credit,
Morgan Stanley

Ashwin Krishnan is a managing director of Morgan Stanley and the co-head of Morgan Stanley's North America private credit team, where he serves on the Investment Committee and is a co-portfolio manager of the opportunistic credit strategy. Krishnan has been a part of the private credit business of Morgan Stanley Investment Management since its inception in 2009 and has over 21 years of relevant industry experience. Krishnan joined Morgan Stanley's Fixed Income Division in 2003, where he spent time as a credit analyst in the high yield and distressed research group, and as a principal investor with

Morgan Stanley Principal Investments. Prior to joining Morgan Stanley, Krishnan was in the communications investment banking group at UBS. Krishnan earned a B.S. in industrial engineering from Bangalore University, India, and an M.S. in engineering from Columbia University.



Christopher Smart
Chief Global Strategist
and Head of
Investment Institute,
Barings

Christopher Smart is chief global strategist and head of the Barings Investment Institute, which undertakes proprietary research to help Barings' investment teams make the most of the firm's distinct perspectives in public and private markets around the world. The institute explores current macroeconomic and political dynamics as well as the forces that shape long-term investment and capital decisions. Smart has worked in the investment industry since 1995, managing international and emerging markets strategies, and has also served as a senior economic policy official at the U.S. Department of the Treasury and the White House.

Prior to joining the firm in 2018, Smart was a senior fellow at the Carnegie Endowment for International Peace and at the Harvard Kennedy School's Mossavar-Rahmani Center for Business and Government. From 2013 to 2015, he served as special assistant to the president at the National Economic

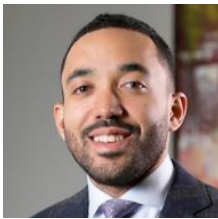
Council and the National Security Council, where he was principal advisor on trade, investment, and a wide range of global economic issues. Smart also spent four years as deputy assistant secretary of the treasury, where he led the response to the European financial crisis and designed U.S. engagement on financial policy across Europe, Russia, and Central Asia. Prior to his government service, he worked as the director of international investments at Pioneer Investments, where he managed top-performing emerging markets and international portfolios.

Earlier in his career, he was an advisor to the Russian Finance Ministry following the collapse of the Soviet Union and a journalist in Florida and France. Smart holds a B.A. in history from Yale University and a Ph.D. in international relations from Columbia University. Fluent in French and Russian, he is a member of the Council on Foreign Relations and holds the CFA designation.

BUILDING A FIRM IN A PANDEMIC - HOW EMERGING MANAGERS ARE FARING ON DUE DILIGENCE, FUNDRAISING AND OPERATIONS

Moderator: **Katie Moore**, Managing Director and Head of Emerging & Diverse Manager Investing, Hamilton Lane

11:05 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



Nick Antoine
Co-Founder and
Managing Partner,
Red Arts Capital

Nick Antoine is a co-founder and managing partner at Red Arts Capital, where he leads fundraising, research, and thesis development. Before forming Red Arts in 2015, Antoine served as special assistant to the chairman and CEO of Ariel Investments, a \$17 billion asset management firm. He began his career as an equity research analyst for Princeton Global Asset Management before moving to Chicago to join Ariel Investments as an equity research associate.

Antoine is the board director of Sunset Pacific Transportation and MME, two of the United States' largest transportation service providers. He is also a board trustee of WTTW Communications

(PBS Chicago), a member of the Economic Club of Chicago, and a member of Princeton University's Alumni Council Executive Committee. Antoine also serves on the chairmen's advisory council for the Big Shoulders Fund, a nonprofit that creates opportunities for inner-city children to attend Catholic schools. Antoine holds a B.A. from Princeton University.



Georgia Clarke
Senior Manager,
Pension Investments,
Raytheon Technologies

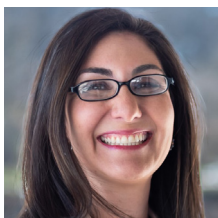
Georgia Clarke is a senior manager at Raytheon Technologies' pension fund, with oversight over private equity and real estate. She oversaw the creation of the first private equity emerging manager program at the pension fund. She previously worked at MassMutual Financial Group as a senior analyst in alternative investments. Clarke started her career as an auditor at PriceWaterhouseCoopers. She received an M.S. in accounting from Western New England University.



Marc F. McMorris,
Co-Chief Executive &
Co-Chair Investment
Committee, Carrick
Capital Partners

Marc F. McMorris is co-CEO and Investment Committee co-chair of Carrick Capital Partners, where he is directly involved in the identification, selection, and post-investment management of the firm's portfolio companies. McMorris works with the CEOs, executive teams, and boards of the firm's portfolio, leveraging his deep understanding of sales, finance, capital structures, and corporate governance. He assists these companies in navigating growth opportunities and in creating substantial long-term value. In addition to his board roles with various Carrick companies, McMorris is a member of the board of directors of the Fair Isaac Corporation and is the vice chairman of the University of Pennsylvania's endowment.

Prior to founding Carrick, McMorris was a managing director for General Atlantic, where he led the Palo Alto office. Previously, he was a vice president in Goldman Sachs' technology group and an associate at Morgan Stanley. He began his career at the Federal Reserve Bank of New York. McMorris earned a B.A. in economics from the University of Pennsylvania and an MBA with a concentration in finance from its Wharton School. He is actively involved with nonprofit organizations that support student development, including the Helix School and Scholars for Educational Opportunity. He lives in the Bay Area with his family. In his spare time, McMorris is a competitive sailor.



Katie Moore,
Managing Director,
and Head of Emerging
& Diverse Manager
Investing, Hamilton Lane

Katie Moore is a managing director at Hamilton Lane on the fund investment team, focused on leading the firm's emerging and diverse investment programs. Previously, Moore was a senior relationship manager to several of the firm's institutional clients, responsible for portfolio construction and strategic planning. She is currently a member of the firm's Responsible Investment Committee and co-chairs the firm's Diversity, Equity and Inclusion Council. Prior to joining the firm in 2007, she was a financial analyst at Murray Devine & Company, a Philadelphia-based valuation advisor to private equity and venture capital firms.

In 2021, Moore was recognized with the Think Advisors Luminaries award in the diversity and inclusion category. Moore was named to Chief Investment Officer magazine's 2020 knowledge brokers list acknowledging the world's most influential investment consultants, and named to Real Deals' 2020 "Future 40 Diversity and Inclusion Leaders" list. In addition to her work at Hamilton Lane, Moore is a member of the Private Equity Women's Investor Network, 100 Women in Finance, and the Forum of Executive Women. Moore received a B.S. in finance from Drexel University.



Jim Rutherford
Founding Partner
and Head of Investor
Relations, BharCap
Partners

Jim Rutherford is a founding partner and head of investor relations at BharCap Partners, a financial services-focused private equity firm based in Greenwich, CT. Prior to BharCap, Rutherford spent six years at Pine Brook as a partner and head of Pine Brook's investor relations team. He was also a member of the Pine Brook Investment Committee. Before Pine Brook, Rutherford was with 3i Group, where he was a partner responsible for fund investor relations and fundraising in the Americas, and with Veronis Suhler Stevenson (VSS), where he oversaw investor relations, fundraising and the firm's co-investment program for six years.

Prior to his 15+ year career in private equity, Rutherford spent 12 years in investment banking as a managing director at J.P. Morgan & Co. in the technology, media and telecom industry investment banking group and as a director at the First Boston Corporation (now Credit Suisse) Media Group. Rutherford began his career as a corporate and securities lawyer at the New York law firm Rogers & Wells (now Clifford Chance). Rutherford holds an A.B. in Near Eastern studies (summa cum laude) from Princeton University and a J.D. from the University of Virginia School of Law.



Troy Williams
Managing Director,
Achieve Partners

Troy Williams is a managing director at Achieve and University Ventures, leading both firms' investments in education technology companies, including AdmitHub, EverTrue, Examity, Motimatic, Packback, and Ready Education.

Prior to University Ventures, Williams was a senior executive at Macmillan, where he was CEO of Macmillan Enterprise Solutions and president of Macmillan New Ventures. Previously, Williams founded and served as CEO of Questia Media, an

early e-book company, and before that he worked in the mergers and acquisitions practice at Cravath, Swaine & Moore in New York.

Williams received his B.A. in history, Phi Beta Kappa, from Rice University and his law degree from Harvard Law School, where he was a member of the Harvard Law Review. He is on the advisory boards of the School of Humanities and the Center for Teaching Excellence at Rice University as well as the advisory board of Jones-Dilworth.

GETTING SELECTIVE ON CO-INVESTMENTS, SECONDARIES AND CONTINUATION FUNDS — WHERE TO FIND VALUE AND HOW TO MITIGATE RISKS?

Moderator: **Mina Pacheo Nazemi**, Managing Director and Co-Head, Funds and Co-Investments, Barings

11:50 AM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



David Belluck
General Partner,
Riverside Partners

David Belluck has been a general partner of Riverside Partners since 1992. He has 30 years of experience investing in and working with lower- and middle-market companies at Riverside Partners, which partners with management and founders in differentiated health care and technology businesses to build their businesses and accelerate growth.

Belluck is a vice chair of the Alliance for Business Leadership, a group of business leaders advancing corporate citizenship and advocating socially responsible economic growth and justice, and chair of the advisory board of American Forward. He sits on the National Advisory Board for Public Service

at Harvard College and on the board of advisors of the Tisch College for Civic Life at Tufts University. Belluck formerly served as chair of Cool Globes Boston and was a member of the Governor's Council of Economic Advisors. He served as the finance chair for U.S. Rep. Joe Kennedy III from 2012 to 2020. Belluck received his MBA with distinction from Harvard Business School and graduated magna cum laude from Harvard University with a B.A. in economics. He lives in Boston and has three children: Alex, Zoe, and Aaron.



Elizabeth Caldas
Investment Officer,
Private Equity, United
Nations Joint Staff
Pension Fund

Elizabeth Caldas is a private equity investment professional at the United Nations Joint Staff Pension Fund, where she co-manages an \$8 billion private equity portfolio. Prior to the UN, Caldas, who has worked in investments and economic development for 15 years, served as the director of private markets at the New York City Office of the Comptroller's Bureau of Asset Management, where she co-managed a private equity portfolio of more than \$14 billion. Prior to her tenure at the NYC comptroller's office, Caldas worked for New York City Mayor Michael Bloomberg's administration, first as deputy director of the New York Empowerment Zone and later as the founding executive director of the NYC Latin Media and Entertainment Commission.

Caldas launched her initial career in business strategy and economic development as a research consultant with the Monitor Company and later as an investment associate with the Upper Manhattan Empowerment Zone Development Corporation. She received her B.S. in economics from Northeastern University in Boston. Caldas is a part-time New Yorker and part-time New Englander—striking a perfect living balance between charging and recharging. She is an avid food lover and expects to earn her diploma in culinary arts by the end of 2002. Her specialty is studying and producing delightful cuisines with health-promoting and healing properties.



Michael Conley
Managing Director,
Blue Owl

Michael Conley is a managing director of Blue Owl and member of the Dyal Capital Partners Investment Team. Before joining Blue Owl, Conley was with Partners Group, where he was responsible for business development and investment origination. He started on the private equity team in Switzerland, sourcing and executing secondary investments for Partners Group in Europe. Conley began his career at Lord, Abbett & Co. within both strategy and business development. He received a B.S. in finance from Penn State University and an MBA from the Johnson School at Cornell University.



Susanne Forsingdal
Managing Director,
Head of the Americas,
Allianz Capital Partners

Susanne Forsingdal is head of the New York investment team at Allianz Capital Partners, a position she has held since January 2015. Prior to joining ACP, Forsingdal was a partner of ATP Private Equity Partners, which she joined in 2003. Previously, she worked in equity research, strategy, and investor relations with Copenhagen-based banks and insurance companies. Forsingdal represents ACP on the advisory boards of a number of private equity funds. She received an M.Sc. in finance and accounting from Copenhagen Business School.



Marcella Freeman
Investor Relations and
Product Management,
Clearlake Capital

Marcella Freeman joined Clearlake Capital Group, a Santa Monica, Calif.-based private equity firm investing in technology and industrials, in 2020 in investor relations and product management. Prior to Clearlake, Freeman, who has 15 years of experience in financial services, was a senior vice president of capital development at EIG Global Energy Partners, where she was responsible for developing relationships with investors globally and managing products across the platform. Prior to EIG, she was a director at Invesco. She began her career at JPMorgan in the private bank, managing strategic projects within the firm's Office of the Chairman.

Freeman serves on the boards of the Florida A&M University Foundation and the National Association of Securities Professionals, a trade organization advocating for diversity across financial services. She is a term member of the Council on Foreign Relations. Freeman received an MBA from Harvard Business School in 2010 and graduated with honors from Florida A&M University in 2005.



Mina Pacheco Nazemi
Managing Director and
Co-Head, Funds and
Co-Investments, Barings

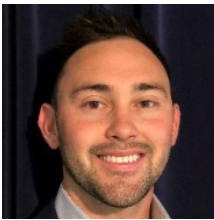
Mina Pacheco Nazemi is a managing director and co-head of the funds and co-investments team at Barings, an international investment management firm. Nazemi also serves on the firm's Investment Committee and Valuation Committee. She is responsible for originating, underwriting, and monitoring primary fund, direct/co-investments, and secondary fund opportunities for private equity and real assets. Nazemi has worked in the industry since 1998 as both a general partner and limited partner investor in private markets, and she has experience in underwriting direct/co-investment opportunities.

Prior to joining the firm in 2017 Nazemi held several leadership and investment positions, including co-founder and partner at Aldea Capital Partners and partner and Investment Committee member at GCM Grosvenor Customized Fund Investment Group (formerly Credit Suisse CFGI). She is an alumna of Sponsors for Education Opportunity and the Robert Toigo Foundation. She is also a board member of the Pan American Development Fund and serves on the Investment Committee for the City of Hope. Additionally, Nazemi is a current finance fellow for the Aspen Institute. Nazemi holds a B.A. with honors in economics and political science from

ACHIEVING PROFIT AND IMPACT — CAN PRIVATE MARKETS DO BOTH?

Moderator: **Michael Elio**, Partner, Private Equity, StepStone Group

12:35 PM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



Joe Aguilar,
Chief Investment
Officer, Illinois State
Treasurer

Joe Aguilar is the chief investment officer for Illinois State Treasurer Michael W. Frerichs. In his role, Aguilar directs seven investment portfolios spanning public and private market investments on behalf of the Illinois treasury's combined \$48 billion investment portfolio, including the Illinois Growth and Innovation Fund, a \$1 billion impact investment fund investing across venture, buyout, and private credit; two 529 college saving plans; the state's Achieving a Better Life Experience program; Student Innovation Investments; Infrastructure Development Account; and the Secure Choice Retirement Savings Program. Aguilar leads all aspects of investment implementation, including the development of processes and procedures, the office's sustainable investment strategy, and the selection of investment products and managers. He leads the investment team and stewards all investments and external

public and private market investment managers, including venture, private equity, and private credit managers invested through the office's platforms.

Aguilar was previously the director of investment analysis and due diligence with the Illinois State Treasury, leading due diligence efforts including the manager selection process, assessment, and monitoring of all investment managers and co-investments. Prior to joining the Illinois treasury, he worked for Fortaleza Asset Management. Aguilar holds a B.S. in finance and business and commerce from Aurora University and an M.S. in finance from the University of Miami's Herbert Business School. He serves as a board member and chair of the Investment Committee for the Field Foundation of Illinois and is an adjunct professor at Aurora University.



Vivianne Akriche,
Managing Director,
Eurazeo North America

Vivianne Akriche is a managing director, based in New York, at Eurazeo. She specializes in the consumer and business services sectors and has participated in the structuring and/or oversight of the investments in Rexel, Intercos, Moncler, Fonroche, Les Petits Chaperons Rouges, WordStrides, and Sommet Education. She was also involved in the strategic acquisition of Eurazeo PME. Before joining Eurazeo in 2004, Akriche was part of the investment banking team at Goldman Sachs in Paris. Akriche holds a master's degree from H.E.C. School of Management in Paris.

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.



Michael Elio
Partner, Private Equity,
StepStone Group

Michael Elio is a research partner based in New York and is co-head of the middle/large market buyout team and head of the secondaries funds sector teams at StepStone. He is also responsible for portfolio construction and management for many of the firm's largest advisory clients, SMA clients, and high-net-worth distribution platforms.

Prior to StepStone, Elio was a managing director at Institutional Limited Partners Association, where he led programs around research, standards, and industry strategic priorities. Prior to that, he was a partner and managing director at LP Capital



Neha Champaneria Markle

Managing Director and Head of AIP Private Markets Solutions, Morgan Stanley

Neha Champaneria Markle is a managing director and the head of AIP Private Markets Solutions at Morgan Stanley, the firm's private markets fund of funds team that has collectively committed over \$20 billion since inception to and alongside external private equity funds. Markle has over 20 years of relevant industry experience and, in 2020, was named to the Wall Street Journal's Women to Watch list. Prior to joining the firm, Markle served on investment teams at global private equity firms Apex

Partners and Pomona Capital. She also served on the management team for Springboard Enterprises, a nonprofit organization focused on improving female entrepreneurs' access to venture capital.

Markle started her career as part of the financial analyst program at Morgan Stanley. She received a B.S. magna cum laude in economics from the University of Pennsylvania and an MBA with honors from the Wharton School of the University of Pennsylvania.



Nazar Massouh

Chief Executive Officer, Orion Infrastructure Capital

Nazar Massouh is the co-founder, CEO, and managing partner of Orion Infrastructure Capital (OIC), as well as chair of the firm's investment and management committees. Prior to co-founding OIC, Massouh played a key role in establishing a credit investment strategy and served as portfolio manager of Energy Capital Partners' Mezzanine Opportunities Fund, an \$805 million private credit fund under the umbrella of ECP, the private equity firm. Before moving to private equity in 2011, Massouh spent seven years at Goldman Sachs developing and implementing fixed income and commodity financing solutions for a broad range of energy companies, most recently as managing director in their Fixed Income, Currency and Commodities Division.

Massouh started his career at NRG Energy in power plant development and project finance, participating in over \$6 billion of energy projects and rising to the position of assistant treasurer and head of project finance. Subsequently, at Beal Bank in Dallas, he originated and structured nearly \$1 billion in energy project finance mezzanine and debt investments. Massouh received a B.S. in international business and mathematics from Aquinas College, magna cum laude, and a master's degree in international management with distinction from the Thunderbird School of Global Management. Massouh and his wife, Jennifer, spend their free time with their children, Olivia and George.



Candace Shaw

Senior Managing Director and Deputy Chief Investment Officer, Sun Life Capital Management

Candace Shaw is senior managing director and deputy chief investment officer at Sun Life Capital Management, where she leads strategic initiatives for institutional market segments and asset classes. As a member of the SLC Management senior leadership team, she provides insight and partnership to help drive solutions across the business. Shaw also focuses on fostering and embedding a culture of diversity and inclusion within the organization and in the asset management industry, and on elevating efforts related to sustainable investment practices and processes.

Shaw has over three decades of experience at Sun Life and SLC Management in leadership roles encompassing private and public fixed income, portfolio management, and credit risk management. Prior to her promotion to her current role in 2020, Shaw was portfolio manager and head of Private Fixed Income. In that role, Shaw led an extensive team of professionals who manage one of the largest private fixed income portfolios in North America.

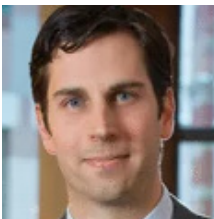
Shaw joined Sun Life in 1987 and quickly progressed through investment positions in the company's Canadian, U.K., and corporate operations. Her portfolio of work includes chief credit risk officer, where she played a critical role in the credit risk management of all credit assets, including private fixed income investments. Prior to becoming the chief credit risk officer, Shaw was senior managing director, portfolio management and international investments. In this dual role, Shaw was responsible for developing portfolio strategies and best practices for Sun Life's worldwide invested assets as well as overseeing the company's international investment operations outside North America.

Shaw holds a B.A. in mathematics, an honors B.S. in chemistry, and an MBA in finance from Queen's University. She received her CFA designation in 1991 and is a member of the Association of Investment Management and Research and the Toronto Society of Financial Analysts.

LUNCH AND KEYNOTE FIRESIDE CHAT

Moderator: **Barry Volpert**, Co-Founder and Chief Executive Officer, Crestview Partners

1:35 PM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN



David Gurtz
Deputy Chief
Investment Officer,
Pension Reserves
Investments Board of
Massachusetts

David Gurtz joined Pension Reserves Investments Board of Massachusetts (PRIM) in 2008 and serves as Deputy Chief Investment Officer. During his time at PRIM, Gurtz has held various senior roles including deputy chief investment officer - director of public markets, chief operating officer & chief financial officer. Prior to those roles, Gurtz served as deputy chief investment officer - director of risk management, and is largely responsible for building the risk management program at PRIM. Prior to joining the PRIM Board, he was a senior manager at KPMG, auditing clients such as hedge funds, private

equity and venture capital funds. Gurtz is a certified CPA and CFA, and has earned a B.S. in accounting from Bucknell University.

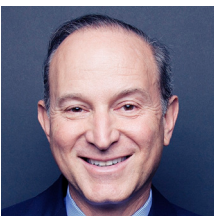


Yup S. Kim
Head of Investments,
CalPERS Private Equity

Yup S. Kim is the head of investments at CalPERS, California's \$450 billion pension fund. He serves on the private equity investment review committee and helps lead CalPERS' private equity program across all functions, including strategy, team management, and investment activities across primary, secondary, and co-investment opportunities globally.

Previously, he served as the senior portfolio manager at the Alaska Permanent Fund Corporation, an \$80 billion sovereign wealth fund, where he helped lead private investment activities. The private

equity and special opportunities portfolio generated 25% net of fee returns over the past decade. He has also held positions at DB Private Equity, where he served on the Investment Committee, Performance Equity, and Silver Point Capital, and he began his career at Citigroup in New York. Kim received his B.A. in economics from Yale University and speaks six languages.



Barry Volpert
Co-Founder and Chief
Executive Officer,
Crestview Partners;
Board Member;
Robert F. Kennedy
Human Rights

Barry Volpert is co-founder and CEO of Crestview, as well as chairman of the Investment Committee. He specializes in complex and contrarian investment themes arising out of major dislocations or restructurings. Volpert retired as a partner of Goldman Sachs in 2003, where he spent 18 years as a co-founder and ultimately co-COO of the global private equity business. Among his responsibilities at Goldman Sachs, Volpert led the international private equity business while based in London for six years and founded the mezzanine fund business. He is currently a director of Venerable Holdings and WOW!, and was previously a director of Industrial Media, Key Safety Systems, Lancashire, Oxbow Carbon and ValueOptions. He also serves as a

member of the Dean's Advisory Board at Harvard Law School, is a member of the Robert F. Kennedy Human Rights board of directors and an elected council member of the Sagaponack Village Erosion Control District.

Volpert received a J.D. 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 A.B. 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

NETWORKING EXCURSIONS

3:00 PM | WEDNESDAY, JUNE 15

Attendees can opt to sail with the Kennedys or join a tour of the John F. Kennedy Hyannis Museum. Pre-registration is required.



CLOSING RECEPTION AND DINNER

6:30 PM | WEDNESDAY, JUNE 15 | SOUTH LAWN, CHATHAM BARS INN

“Every time we turn our heads the other way when we see the law flouted—when we tolerate what we know to be wrong—when we close our eyes and ears to the corrupt because we are too busy, or too frightened—when we fail to speak up and speak out—we strike a blow against freedom and decency and justice.”

— Robert F. Kennedy, Chicago, Illinois, June 21, 1961

SPONSORS



UNDERWRITER



Insight Partners is a global software investor partnering with high-growth technology, software, and internet startup and ScaleUp companies that are driving transformative change in their industries. As of February 24, 2022, the closing of the firm's recent fundraise, Fund XII, brings Insight Partners regulatory assets under management to over \$90 billion. Insight Partners has invested in more than 600 companies worldwide and has seen over 55 portfolio companies achieve an IPO. Headquartered in New York City, Insight has offices in London, Tel Aviv, and Palo Alto. Insight's mission is to find, fund, and work successfully with visionary executives, providing them with practical, hands-on software expertise to foster long-term success. Insight Partners meets great software leaders where they are in their growth journey, from their first investment to IPO. For more information on Insight and all its investments, visit insightpartners.com or follow us on Twitter, @insightpartners.

PIONEER



Grain Management, LLC is a leading global investment firm that focuses on broadband infrastructure and technology companies that connect the world to the information economy. Founded in 2007 by David Grain, Grain invests exclusively in the global telecommunications sector, employing a rigorous, data-based process buoyed by deep industry expertise to identify investment opportunities in key areas of telecommunications infrastructure, including fiber networks, wireless spectrum and cell towers.

As a former operator with two decades of experience, David Grain envisioned an investment management firm that would create value through focus, expansive sector knowledge, rigorous analytics, and a dedicated team of financial professionals. Grain has realized this vision by assembling the best investment minds in the industry, using sophisticated data analysis and a disciplined process to uncover and assess opportunities.

The Firm is passionate about both telecommunications investing and effecting positive change in local communities that depend on essential broadband services. We are committed to our management teams, our partners, and to operational excellence. Through this vision and its execution, Grain has managed over \$7 billion of capital, consistently generating outsized returns for leading global institutions, including endowments, foundations, and pension plans. For more information, visit www.graingp.com.



VISTA is a leading global investment firm with more than \$96 billion in assets under management as of March 31, 2022. The firm exclusively invests in enterprise software, data, and technology-enabled organizations across private equity, permanent capital, credit, and public equity strategies, bringing an approach that prioritizes creating enduring market value for the benefit of its global ecosystem of investors, companies, customers, and employees. Vista's investments are anchored by a sizable long-term capital base, experience in structuring technology-oriented transactions, and proven, flexible management techniques that drive sustainable growth. Vista believes the transformative power of technology is the key to an even better future—a healthier planet, a smarter economy, a diverse and inclusive community, and a broader path to prosperity. Further information is available at vistaequitypartners.com. Follow Vista on LinkedIn, @Vista Equity Partners, and on Twitter, @Vista_Equity.

EXECUTIVE



Ariel Investments is a global value-based asset management firm founded in 1983. Ariel uses the market's short-term focus to uncover mispriced companies whose true value will be realized over time. The firm is headquartered in Chicago, with offices in New York City, San Francisco, and Sydney. Ariel serves individual and institutional investors through five no-load mutual funds and nine separate account strategies. For more information, please visit Ariel's website at arielinvestments.com.



Founded in 2006, **Clearlake Capital Group, L.P.** is an investment firm operating integrated businesses across private equity, credit, and other related strategies. With a sector-focused approach, the firm seeks to partner with experienced 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 technology, industrials, and consumer. Clearlake currently has over \$72 billion of assets under management, and its senior investment principals have led or co-led over 300 investments. The firm is headquartered in Santa Monica, Calif., with affiliates in Dallas, London, and Dublin.

Clearlake is led by José E. Feliciano and Behdad Eghbali, who have together built a team of investment professionals with a blend of sector and product capabilities through a history of long-term strategic partnerships with management to transform and grow companies. The team has approximately 200 years of collective experience with a focus on complex situations in small and medium-sized companies.



Founded in 2004, **Crestview Partners** is a New York-based value-oriented private equity firm focused on the middle market that manages funds with approximately \$10 billion of aggregate capital commitments. It is led by a group of partners who have complementary experience and distinguished backgrounds in private equity, finance, operations, and management. Crestview has senior investment professionals focused on sourcing and managing investments in each of the specialty areas of the firm: media, financial services, and industrials.

EURAZEO

Eurazeo is a leading European private equity firm with €31 billion in assets under management. Throughout its 130-plus year history, the firm has invested in over 500 companies across its strategies in private equity, private debt, and real assets. Eurazeo seeks to be the partner of choice for middle-market companies looking to unlock growth potential on a global basis. With deep sector expertise in technology, health care, financial services, and consumer, Eurazeo brings a long-term commitment and focus on sustainable, responsible growth as a leader in ESG enhancements. Further information about Eurazeo can be found at www.eurazeo.com/en.

EXECUTIVE



Federated Hermes is guided by the conviction that responsible investing is the best way to create long-term wealth. We provide specialized capabilities across equity, fixed income, and private markets, in addition to multi-asset strategies and proven liquidity-management solutions. Through our world-leading stewardship services, we engage companies on strategic and sustainability concerns to promote investors' long-term performance and fiduciary interests. Our goals are to help individuals invest and retire better, to help clients achieve better risk-adjusted returns, and to contribute to positive outcomes in the wider world. Federated Hermes has \$631.1 billion in assets under management and \$1,598.3 billion in assets under advice. The firm employs more than 1,950 employees in 14 offices in North America, Europe, and Asia. We offer specialized investment capabilities in public and private markets, and these pioneering stewardship services:

- Active equities: global and regional
- Fixed income: across regions, sectors and the yield curve
- Liquidity: solutions driven by four decades of experience
- Private markets: infrastructure, private equity and debt
- Stewardship: corporate engagement, proxy voting and policy advocacy

All activities previously carried out by Hermes Investment Management are now undertaken by Federated Hermes Limited (or one of its subsidiaries). We still offer the same distinct investment propositions and pioneering responsible investment and stewardship services for which we are renowned in addition to important strategies from the entire group.



Greenberg Traurig is an international law firm founded in Miami, Fla., in 1967. We represent venture capital firms, sponsors of private equity funds, registered investment companies, investment managers and advisors in capital formation, portfolio investment, asset management, capital raising, and related commercial activities. We have been recognized for philanthropic giving, diversity, and innovation, and are consistently among the largest firms in the U.S. on the Law360 400 and among the top 20 on the American Lawyer Global 100.



Guggenheim Investments is the global asset management and investment advisory division of Guggenheim Partners and manages assets across fixed-income, equity, and alternative strategies. Our investment professionals perform rigorous fundamental and quantitative research to understand market trends and identify undervalued opportunities. We have an extensive track record of delivering innovative solutions by focusing on the needs of institutional and retail clients across a broad range of investment products and strategies.



PIMCO is a global leader in active fixed income. With our launch in 1971 in Newport Beach, California, PIMCO introduced investors to a total return approach to fixed income investing. In the 50 plus years since, we have worked relentlessly to help millions of investors pursue their objectives – regardless of shifting market conditions. As active investors, our goal is not just to find opportunities, but to create them. To this end, we remain firmly committed to the pursuit of our mission: delivering superior investment returns, solutions and service to our clients.



Siris Capital is a leading leading private equity firm that invests primarily in mature technology and telecommunications companies with mission-critical products and services that are facing industry changes or other significant transitions. Siris' development of proprietary research to identify opportunities and its extensive collaboration with its executive partners and advisors are integral to its approach. Siris' executive partners and advisors are experienced senior operating executives who actively participate in key aspects of the transaction lifecycle to help identify opportunities and drive strategic and operational value. Siris is based in New York, Silicon Valley, and West Palm Beach, and has raised nearly \$6 billion in cumulative capital commitments. Find more information at www.siris.com.

INFLUENCER



ADW Capital Partners, L.P. is a value-driven investment fund founded by Adam Wyden in January 2011. The fund is looking to invest in “off the run” securities. It employs a concentrated, tax-sensitive, and long-term strategy.



Formed through the combination of Dyal Capital and Owl Rock, **Blue Owl Capital** offers attractive financing and capital solutions to investment management firms and their portfolio companies. As the firm continues to grow and expand our capabilities, we remain singularly focused on providing investors access to attractive risk-adjusted returns across strategies. As we move forward as one, Blue Owl will continue to rely on the strength of its human capital to deliver an innovative and comprehensive suite of financial solutions to both the broader alternative asset management industry and the investors that it serves.

Dyal has been an innovator in building diversified portfolios of minority equity investments in institutionalized alternative asset management firms across multiple strategies, geographies, and asset classes since 2010.

- An industry-leading capital provider with \$41.2 billion in assets under management.
- A proven track record, having completed over 65 equity and debt transactions.
- Deep and extensive relationships across the alternative asset management ecosystem.



Blue Wolf Capital Partners LLC is a private equity firm that makes transformational investments in middle-market companies. Founded in 2005, Blue Wolf manages \$2.9 billion in capital and builds strong businesses by combining operational, strategic and financial discipline with environmental, social, and governance (ESG) principles. Blue Wolf invests in health care and industrial companies, and combines deep networks with sector expertise to manage complex relationships between business, customers, employees, unions, and regulators to build sustainable value for stakeholders and investors.



Gridiron Capital is an investment firm focused on partnering with founders, entrepreneurs, and management teams and creating value by building middle-market companies into industry leaders in branded consumer, B2B and B2C services, and niche industrial segments in the United States and Canada. We help transform growing companies through hard work, partnerships grounded in shared values, and a unique culture that comes from hands-on experience building and running businesses. As a team led by former operators and entrepreneurs, we know what it takes to run successful businesses on a day-to-day basis.

With over \$6.1 billion in AUM, Gridiron has invested in over 100 companies, including 31 platform investments, over its 16-year history. Gridiron targets control, equity investments and takes a thematic approach to investing, known as Gridiron’s Thematic Areas of Expertise, by identifying target areas early where the firm has a particular expertise and formulating a viewpoint and strategy ahead of establishing new partnerships.



Kohlberg & Company is a leading U.S. private equity firm that has been investing successfully in the North American middle market since 1987. The firm has organized nine private equity funds, through which it has raised \$11 billion of committed equity capital. Over its 35-year history, Kohlberg has completed 90 platform investments and over 240 add-on acquisitions, with an aggregate transaction value of approximately \$35 billion. The firm utilizes a thesis-driven approach to investing in the middle market through its White Paper program focused on six core practice areas: pharmaceutical/medical products and services, infrastructure services, financial and information service, business services, health care service, and food and consumer.

INFLUENCER



KSL Capital Partners is dedicated to investing in travel and leisure businesses. For nearly 30 years, our team has leveraged its deep operational heritage to unlock unique opportunities for our partners, investors, and customers. We invest, lend, and partner across hospitality, resorts, recreation, clubs, real estate, and travel services. KSL's capabilities range from boutique asset management to globally branded platform development. Since its formation, KSL has raised approximately \$18 billion of capital and invested in over 150 businesses to date across the globe. We are currently investing from KSL Capital Partners VI, KSL Tactical Opportunities I, and KSL Credit Fund III.



Medina Capital is a strategic growth equity fund that exclusively invests in cybersecurity and IT infrastructure. Medina Capital's GP leverages its team's combined experience gained working together as the senior executive team of Terremark Worldwide, which was traded on the NASDAQ until its successful exit to Verizon Communications in a transaction valued at \$2 billion. Currently, Medina Capital has two active publicly traded portfolio companies: Cyxtera and Appgate.



Morgan Stanley Investment Management, together with its investment advisory affiliates, has more than \$1.4 trillion in assets under management or supervision as of March 31, 2022. Morgan Stanley Investment Management strives to provide outstanding long-term investment performance, service, and a comprehensive suite of investment management solutions to a diverse client base, which includes governments, institutions, corporations, and individuals worldwide. The combination with Eaton Vance allows the firm to bring even more value to clients through many high-quality, complementary investment offerings, delivered with an unwavering commitment to client service. Professionals across the globe draw upon these capabilities to develop strategies that address a wide range of investors' needs across the public and private markets.



New Mountain Capital is an alternative investment management firm focused on private equity, credit, and net lease strategies with assets under management totaling more than \$37 billion. Founded in 1999 by Steven B. Klinsky, today New Mountain has nearly 200 employees, 110 of whom are investment professionals.

New Mountain's investment efforts emphasize intensive fundamental research and a focus on growth and investor "value add"—rather than reliance on excessive risk—as the best path to high and consistent long-term returns. New Mountain has proactively developed particular research and operational expertise in carefully selected "defensive growth" niches of health care, software, business services, information and data, logistics, specialty chemicals, federal services, financial services, and environmental services. New Mountain Capital works systematically to establish expertise in additional sectors over time.



One Rock Capital Partners focuses on complex and value-oriented situations involving industrial manufacturing and service companies where value creation can be achieved through hands-on operational improvement and strategic repositioning. One Rock's operationally focused strategy prioritizes complex situations because they often enable lower entry valuations and enhanced value creation opportunities through leveraging the help of operating partners. One Rock aims to transform companies into high-performing businesses throughout the ownership by driving meaningful changes and creating long-term value for the stakeholders. The firm generally focuses on control positions and invests in "real economy" businesses operating in the following areas:

- Chemicals & Process Industries
- Specialty Manufacturing & Healthcare Products
- Food & Beverage Manufacturing & Distribution
- Business & Environmental Services
- Auto Retail

With approximately \$5 billion of cumulative capital commitments and a team consisting of 29 investment professionals and 22 dedicated operating partners, One Rock has offices in New York (headquarters) and Los Angeles.

INFLUENCER



Patient Square Capital is a dedicated health care investment firm that partners with best-in-class management teams whose products, services, and technologies improve health. Patient Square utilizes deep industry expertise, a broad network of relationships, and a true partnership approach to make investments in companies grow and thrive. Patient Square invests in businesses that strive to improve patient lives, strengthen communities, and create a healthier world. Patient Square's team of industry-leading executives is differentiated by the depth of focus in health care, the breadth of health care investing experience, and the network it can activate to drive differentiated outcomes. (www.patientsquarecapital.com)



Pearl Energy Investments is a Dallas-based investment firm with approximately \$1.7 billion of committed capital under management. Founded by Billy Quinn, former co-managing partner of Natural Gas Partners, Pearl focuses on partnering with best-in-class management teams to invest in the lower- to middle-market North American energy and sustainability sectors.



Quantum Energy Partners is an \$18 billion firm based in Houston, focused on private equity, private debt, and venture capital investments within the responsibly sourced and sustainable energy ecosystem. Throughout its 25-year history, Quantum has established itself as a world leader in providing private capital and generating attractive risk-adjusted returns across the energy value chain thanks to its proven investment and stewardship strategies, its complementary team of cycle-tested energy professionals, its unwavering commitment to ESG and digital transformations, and its multi-decade investment track record. The firm's strategy has been tested and refined through multiple commodity, market, and technology cycles, and is based on the preservation of capital and a relentless focus on identifying, analyzing, pricing, and managing risk in order to reduce volatility.

Quantum is proud of its implementation of robust ESG programs, proactive engagement with industry and environmental groups, and multi-decade practice of ESG accountability at the portfolio company level. Quantum is committed to infrastructure, power and renewables, carbon capture, use and storage, decarbonization and the circular economy, responsibly sourced oil and gas production, and the energy and sustainability technologies sectors. The firm is an existing signatory of the Principles of Responsible Investment and the Institutional Limited Partners Association's Diversity in Action initiative.



Headquartered in Chicago, **Red Arts Capital** is a leading private equity firm focused on supply chain services, logistics, and related industries. Since inception, Red Arts has completed mergers and acquisitions of nearly \$400 million. The firm's objective is to invest in privately-owned, family-owned and multigenerational businesses with solid operating fundamentals, strong reputations, and track records of financial performance.



Rialto Capital Management is an integrated commercial real estate investment and asset management firm with roots in distressed investing and creating value through owning and operating real estate, with 250-plus professionals across the country focused on real estate credit and direct real estate equity investment strategies.



SVB Capital is the venture capital and credit investing arm of SVB (Nasdaq:SIVB). Uniquely positioned to access highly sought-after opportunities in start-up companies and venture capital funds, SVB Capital invests in fund managers and private technology and life science companies throughout the innovation economy around the world. Managing more than \$7 billion in assets primarily on behalf of third party limited partners, SVB Capital is one of SVB's core businesses with Silicon Valley Bank, SVB Private and SVB Securities. Learn more at svb.com/svb-capital.

SUPPORTER



Achieve Partners is engineering the future of learning and earning by investing in cutting-edge technologies and novel business models to bolster skill development and secure the future of work for millions of Americans. By harnessing digital transformation to build new models for learning and new pathways to good jobs, we can level the playing field, dramatically improve socioeconomic mobility, and rekindle the American Dream.



BharCap is a minority-owned and controlled private investment firm specializing in the financial services sector. BharCap was founded by managing partner Bharath Srikrishnan and five other partners in February 2021. A cohesive team, five of the firm's six founding partners worked together at Pine Brook Partners for several years before joining BharCap. We have expertise across the entire financial services sector and employ a thematic approach, which we believe enables us to prioritize the most attractive subsectors of the financial services industry. Currently, we are focused primarily on the following subsectors: asset and wealth management; insurance distribution and insurance services; financial technology; payments and tech-enabled services; and specialty finance. Four of the founding partners who are investment partners have worked together on 11 investments, seven of which have been fully or partially realized. Overall, the BharCap team has been involved with, and has contractual attribution for, 12 financial services investments totaling approximately \$1.2 billion in invested capital. BharCap is currently investing \$1.8 billion of available client capital.



Headquartered in San Francisco and Newport Beach, with more than \$1 billion in AUM, **Carrick Capital Partners** is a growth-oriented investment firm that utilizes its approach to building value (ABV) to operationally scale companies that focus on software, technology-enabled service offerings, business process outsourcing, and transaction processing.

Based on decades of experience in business services and software, Carrick's investment approach is to understand long-term themes and trends in its areas of expertise and then apply a bottom-up assessment of the total addressable market, business model scalability, and a customer-centric understanding of the service offering. Carrick distinguishes between assets and scalable companies and avoids momentum investing by pursuing a value-conscious approach as a critical component of building a long-term portfolio of companies with the right risk/return profile.

Carrick's investment strategy involves direct investment in privately held companies that demonstrate high gross-margin potential, capital efficiency, and significant operating leverage. The approach emphasizes detailed operational assessment during due diligence and extensive involvement post-investment. By taking a concentrated portfolio approach and dedicating significant resources post-investment, Carrick helps scale growth-oriented companies, stimulating economic growth and positively impacting the industry landscape. Working directly with CEOs and entrepreneurs, Carrick fulfills a vital need for investment capital and growth expertise.

CRESCENT

At **Crescent Capital**, we invest in debt securities at all levels of a company's capital structure. For 30 years, we have been investing in senior bank loans, high yield bonds, mezzanine debt and distressed debt securities. We believe these asset classes provide our clients with opportunities to generate income while preserving capital.

Crescent's investment activities are managed by dedicated teams focused on each of these asset classes. In addition, our portfolio managers have responsibility for multi-asset class strategies constructed from each of the asset classes we manage. We believe we benefit from years of experience managing below-investment-grade bank loans and debt securities over multiple economic and market cycles.

Crescent is an alternative asset manager with approximately \$38 billion in assets under management and over 200 employees as of March 31, 2022. We are headquartered in Los Angeles with offices in New York, Boston, and London.

SUPPORTER



GDA Luma Capital Management was founded in 2021 by Gabriel de Alba and is supported by seven additional investment professionals based in New York and London. The fund is seeking asymmetric risk-reward opportunities in North America and European middle-market distressed situations; and is differentiated by a collaborative approach with stakeholders to pursue disciplined recapitalizations, restructurings, and operational transformations. It has a proprietary approach that emphasizes ESG and digital transformations. De Alba spent almost 20 years successfully executing this strategy and, alongside the other members of the senior team, has extensive experience in leading recapitalizations and restructurings to generate strong returns for investors.



ICV Partners is a private equity firm focused on investments in the lower- to middle-market. Headquartered in Miami, Fla., the firm manages \$1.4 billion in AUM across four flagship funds for a number of the country's leading public pension funds, corporate plans, and high net worth individuals. Focused on investments in business services, consumer products and services, food and beverage, and health care, ICV's professionals bring over 100 years of collective experience in the alternative investments space.



Integrum was founded by a team of proven leaders with a vision to build a different type of investing platform benefiting from the complementary experiences and skill sets of a diverse team with a focus on operational value creation. The firm pursues a highly focused investment strategy, targeting technology-enabled services businesses, where Integrum's senior executives have decades of investing, operating, and leadership experience. Integrum is primarily focused on investing across the insurance and insurance services, corporate and business services, financial technology and payments, and traditional financial services sectors.

Integrum embraces the principles of partnership, innovation, focus, and being impactful. The firm is committed to driving positive social impact by pledging to commit 10% of the carried interest value to the Integrum Charitable Foundation, which will allocate grants to a wide range of organizations across health care, education, community, and social projects. Further information is available at integrumholdings.com.



Lafayette Square an impact investment platform working locally to create an inclusive American economy. Our mission is to be the leading provider of impact-driven capital. We believe deploying capital and curating services will create economic opportunity for all. As we make investments, we work with a mission-aligned network to provide impactful services that improve the well-being of underserved people and communities. For more information about Lafayette Square, please visit lafayettesquare.com.



Orion Infrastructure Capture (OIC) is a capital solutions provider to middle-market infrastructure businesses primarily in North America and select international markets supporting environmental and social innovation in infrastructure. We have approximately \$2.8 billion in assets under management and utilize flexible capital to employ a partnership approach to support business owners and operators. Our approach centers on a true capital partnership model—for entrepreneurs, by entrepreneurs. We don't pretend to know more about a partner company's business than they do. We offer customized capital solutions that allow them to pursue their vision as they see fit—supported by our team's deep expertise, extensive industry connections, and proven operating experience.



Sycamore Partners is a New York-based private equity firm specializing in consumer, distribution, and retail-related investments. The firm has approximately \$10 billion in aggregate committed capital. Sycamore's strategy is to partner with management teams to improve the operating profitability and strategic value of their businesses. Sycamore provides flexible capital structured for each investment to position companies to succeed.

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President, Strategic
Partnerships
and Investor
Engagement



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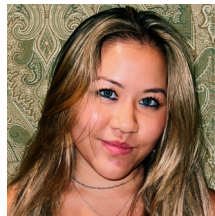
Nisa Patel
Manager,
Stakeholder
Engagement



Kelly Rybczyk
Outreach
Coordinator,
Investor
Engagement



Michael Seitz
Intern, Investor
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Sarah Tran
Intern, Investor
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Zaynah Waseem
Outreach
Coordinator,
Investor
Engagement



Mellody Zhao
Intern, Investor
Engagement

THANK YOU

“It is from numberless diverse acts of courage and belief that human history is shaped. Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and crossing each other from a million different centers of energy and daring, those ripples build a current that can sweep down the mightiest walls of oppression and resistance.”

— Robert F. Kennedy, University of Cape Town, June 6, 1966

THANK YOU TO OUR PROGRAM PARTNERS AND ADVISORS FOR THEIR SUPPORT, ESPECIALLY OVER THESE PAST TWO YEARS:

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The Investment Diversity Exchange (TIDE)	and many more!
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WE WOULD LIKE TO THANK THE FOLLOWING INDIVIDUALS FOR THEIR SUPPORT OF THIS EVENT:

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William Ference Catering
Shannon Zoller

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Max Kennedy
Drew & Shannon Hayden
Ted Kennedy, Jr. & Kiki Kennedy
Peter McLaughlin
Brian O'Neil
Anthony Shriver

UPCOMING EVENTS

COMPASS FALL INVESTORS CONFERENCE

WHEN

Sunday, October 2, 2022 - Tuesday, October 4, 2022

WHERE

W Hotel South Beach, Miami, FL

For further information, contact Fanta NGom at ngom@rfkhumanrights.org.



33RD ANNUAL GOLF TOURNAMENT

WHEN

Friday, October 14, 2022

WHERE

Hyannisport Club, Hyannis Port, MA

For further information, contact Christina Taylor at tme@rfkhumanrights.org.

RIPPLE OF HOPE AWARDS GALA

WHEN

Tuesday, December 6, 2022

WHERE

New York City



For further information, contact Melissa Cather at cather@rfkhumanrights.org. Scan the code above to learn more about sponsorship opportunities.



2023 COMPASS SUMMER INVESTORS CONFERENCE

WHEN

Tuesday, June 27, 2023 - Friday, June 30, 2023

WHERE

Cape Cod, MA

For further information, contact Sancia Dalley at compass@rfkhumanrights.org.

**ROBERT F.
KENNEDY
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Stay in touch with the RFK Compass Team
at compass@rfkhumanrights.org.



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