Infrastructure Investor

New York Summit
Virtual experience 2020

December 2-3 | Available anywhere (EST)

Co-host:

Women in Infrastructure New York Forum
Virtual Experience 2020

Preliminary agenda

Day 1 | December 2nd

9:05am **LP think tank (invitation-only)**

FACILITATOR:
Lawrence Slade, CEO, **GIIA**

9:50am **PEI welcome & chairman's opening remarks**

PEI:
Seth Kerker, Director of Events - Americas, **PEI**

CHAIRMAN
Mark Weisdorf, Managing Partner, **Mark Weisdorf Associates, LLC**

10:00am **Keynote interview**

How will the presidential election impact the funding of US Infrastructure?

MODERATOR:
Jordan Stutts, Senior Writer, **Private Markets, PEI**

KEYNOTE SPEAKER
Dr. Morteza Farajian, Executive Director, **Build America, U.S. Department of Transportation**

10:40am **Limited partner roundtable discussion**

- Are LPs less keen on seed assets?
- Which strategies are performing well and why?

MODERATOR:
Mark Weisdorf, Managing Partner, **Mark Weisdorf Associates, LLC**

PANELISTS:
Petya Nikolova, Head of Infrastructure, **New York City Retirement System, Office of the Comptroller**

11:25am **Networking break**

11:35am **Digital infrastructure is an imperative**

Digital infrastructure has fallen dramatically in favor of investors as the next critical piece of how economies function. What are the leading trends, risks and opportunities?

MODERATOR:
Kanan Joshi, Executive Director, **Upper Bay Infrastructure Partners**

PANELISTS:
Peter Gray, Director, **OMERS**
Dylan Foo, Managing Director, **Apollo**
Kevin Smithen, Managing Director, **Global Head of Strategy and Capital Formation, Digital Colony**
Mohamed El Gazzar, Partner, **I Squared Capital**

12:25pm **Infrastructure debt**

- Interest in infrastructure debt strategies continues to grow
- What is the best way to finance infrastructure?
- Which subsectors are most attractive and why?
- What types of cash yields can investors expect?

MODERATOR:
Peter Sipsas, Managing Director, **Head of Credit, Jensen Partners**

PANELISTS:
Jeetu Balchandani, Managing Director, **Global Head of Infrastructure Debt, BlackRock**
Vivien de Gunzburg, Founder & Managing Partner, **Ceres Infrastructure Asset Management**
Jennifer Powers, Partner & Chair, **GIP Credit, Global Infrastructure Partners**
Richard Randall, Global Head of Debt Investments, **IFM Investors**

1:10pm **Mid-day networking break**

1:45pm **Fireside chat: a more integrated approach to sustainability**

MODERATOR:
Susan Mac Cormac, Partner, **Morrison & Foerster**

PANELIST:
Chris Leslie, Global Head of Sustainability, **Senior Managing Director, Macquarie Infrastructure and Real Assets (MIRA)**

2:20pm **GP roundtable**

Early signs indicate that the asset class has proved to be resilient during the global pandemic; will private infrastructure be one of COVID-19's winners?

MODERATOR:
Kyle Alexander, Managing Director, **State Street**

PANELISTS:
Mark A. McComiskey, Partner, **AVAIO**
Todd Bright, Partner, **Head of Private Infrastructure Americas, Partners Group**
Ross Posner, Managing Partner, **Ridgewood Infrastructure**

3:10pm Breakout series

Track A | Transportation

- What are investors doing to return these assets back to good health?
- Can airports get their mojo back?
- What companies in this sector are thriving in the current environment?
- What are the capital markets and other financing sources' outlook on transportation businesses?

PANELISTS:

Mike Discenza, Chief Financial Officer, **Transurban North America**
Emmett McCann, Managing Director and Co-Portfolio Manager, **Oaktree Capital Management**
Marietta Moshiashvili, Chief Executive Officer and Managing Partner, **Upper Bay Infrastructure Partners**

Track B | InfraTech

- Why is InfraTech gaining so high importance now?
- What regions of the world currently offer the highest growth potential for InfraTech?
- Where do you envisage InfraTech in 5years and in 10years?

MODERATOR:

Caroline Abramo, CIO and Founder, **Pana LCE**

PANELIST:

Jeffrey Altman, Senior Advisor, **Finadvice AG**
Paul Manias, Managing Partner, **Climate Innovation Capital**
Jonathan Winer, Co-CEO, **Sidewalk Infrastructure Partners**

Track C | Infra secondaries

Why are single-asset secondaries booming?

MODERATOR:

Pablo Caló, Partner, **Cross Functional, Fairview Capital Group**

PANELIST:

Mark Bhupathi, Managing Director, **Strategic Partners**

3:55pm **Networking break**

4:15pm **Renewable energy and sustainability**

- What are the current major investment opportunities and risks? How will the presidential election change the risks and opportunities that fund managers face?
- What impacts has COVID-19 had on the investment landscape?
- What needs to be done to stimulate further private investment in renewable energy?
- What do you see on the horizon for the US renewable market beyond COVID-19 and the presidential election?

MODERATOR:

Elizabeth Sluder, Partner, **Morrison & Foerster**

PANELISTS:

Keith Derman, Partner and Co-Head, **Ares Infrastructure and Power, Ares Asset Management**
Pooja Goyal, Partner and Head of Renewable and Sustainable Energy, **The Carlyle Group**
Rick Needham, Partner, **Energy Sector Lead, The Rise Fund, TPG**

Day 2 | December 3rd

9:05am **Women's networking roundtable (Invitation-only)**

FACILITATOR:

Sarah Fitts, Partner, **Schiff Hardin LLP; Steering Committee Member, Women's Infrastructure Network**

9:55am **PEI welcome**

Seth Kerker, Director of Events – Americas, **PEI**

10:00am **Spotlight Discussion: Environmental Justice**

- Energy and the transition to clean
- ESG with a focus on the S

MODERATOR:

Jordan Stutts, Senior Writer, **Private Markets, PEI**

PANELISTS:

Dr. Michael K. Dorsey, CEO & Co-Founder, **Around the Corner Capital (USA), Managing Director, IberSun (Spain) & LP Pahal Solar**
Andrew Rodriguez, CEO & Chief Investment Officer, **Change Finance**

10:40am **ESG focused recovery beyond renewables**

- Addressing racial and economic inequalities through infrastructure investment
- Carbon emission reduction
- How do make our current infrastructure last longer?

PANELIST:

Peter Plaut, Executive Director, **Wimmer Family Office**

11:30am **Networking break**

11:50am Breakout series

Track A | Fundraising in a digital age

PANELIST:
Ray Albright, Senior Managing Director, **Keel Harbour**
Leslie Wolff Golden, Managing Director, **Digital Colony**

Track B | US P3s

- Is the post pandemic US market primed for PPPs?
- What's the best way to navigate North American PPP?

PANELISTS:
Martin Klepper, Chairman, **Fengate Capital Management**

Track C | Social infrastructure

Why these investments make sense for your infrastructure allocations

MODERATOR:
Zak Bentley, Senior Reporter, **Infrastructure Investor**
Panelist:
Carolyn Arida, Director & Head of Utilities, **Harrison Street Social Infrastructure Fund**

12:35pm **Chairman's closing remarks**

12:40pm **Women in Infrastructure networking break**

Women in Infrastructure New York Virtual Forum

December 3rd | 1:00 – 5:00pm

1:00pm **PEI welcome & chairwoman's opening remarks**

CHAIRWOMAN:
Julia R. Balas, Partner, **Morrison Foerster**

1:15pm **Opening keynote discussion**

1:55pm **Visions, insight's and perspectives**

- How can private investment be leveraged to create quality sustainable infrastructure?
- Has it been hard for women owned firms to raise money during the pandemic? Have you noticed a growing effort to increase diversity in private infrastructure?
- How has the pandemic altered your investment decisions? Identifying new investment opportunities? What are the most attractive opportunities?
- How will the outcome of presidential election impact the funding of US Infrastructure? What are your biggest concerns? What are you potentially looking forward to?

PANELISTS:
Andrea Mody, Co-head & Chief Operating Officer, **MIGS Funds, Head of Alternatives, Client Solutions Group Americas, Managing Director, Macquarie Infrastructure and Real Assets (MIRA)**
Christy Silvester, Portfolio Manager, **Credit, Global Infrastructure Partners**
Elena Savostianova, Managing Partner, **Ember Infrastructure**

2:45pm **Networking break**

3:05pm **Keynote fireside chat**

KEYNOTE SPEAKER:
Anne Valentine Andrews, Deputy Head of Real Assets, **BlackRock**
MODERATOR:
Sasha Jensen, CEO, **Jensen Partners**

3:45pm **Keynote leadership roundtable**

PANELIST:
Angela Rodell, CEO, **Alaska Permanent Fund Corporation**

4:40pm **Chairwoman's closing remarks**