



Single Day Track

October 30, 2019,

Harvard Club, New York, NY

8:40am - 08:45am

Welcoming Remarks

- » **Daniel Weinstein**, Conference Producer, **Buyouts Insider**

8:45am - 9:15am

Opening keynote Presentation:

Global Economic Trends: The Investment Environment facing Family Offices and the wider PE class

- » **Mike Williams**, Managing Director, **Truvestments**

9:15am - 10:00am

Fund investments, Co investments and Direct Deals - LPs set the scene

- » **Moderator: Ahmed Fattouh**, Founder & CEO, **InterPrivate LLC**
- » **Jeremy Knox**, Senior Investment Director, **Schroder Adveq Management US**
- » **Howard Gurvitch**, Chief Investment Officer, **Gurvitch Family Office**
- » **Rob Nagle**, Senior Investment Director, **Aberdeen Standard Investments**,
- » **Nick Russell**, Partner, **Tuckerman**

10:00am - 10:30am

The Independent Sponsor Debate - Funded vs Unfunded?

- » **Moderator: Lilies Lanway**, Senior Vice President, **Accord Financial**
- » **Douglas Song**, Co-Founder & Managing Director, **Prodos Capital**
- » **Derek McDowell**, CEO, **Boyne Capital**

10:30am - 11:00am

How to set up a co-investment program that is sure to succeed

- » **Moderator: Claudine M. Cohen**, Principal, **CohnReznick Advisory - Transactional Advisory Services, Northeast Market Leader**
- » **Christian E. Lund**, Partner, **Hamilton Robinson Capital Partners**
- » **Katherine Hill Ritchie**, Director, **Strategic Development, Nottingham Spirk Family Office**
- » **Marcia Nelson**, Managing Director, **Alberleen Family Office Solution**

11:00am - 11:30am

Morning Networking Break

11:30am - 12:30am

SharkTank Exchange:

Funds Present to Family Offices

- » **Moderator: Brian Smiga**, Co-Founding Partner, **Alpha Venture Partners**
- » **Chris Girgenti**, Managing Partner, **Pritzker Group Venture Capital**
- » **Gavin Myers**, Co-Founder & General partner, **Prudence Holdings**
- » **Ankur Jain**, Founding Partner, **Emergent Ventures**
- » **Craig Enenstein**, Chief Executive Officer, **Corridor Capital, LLC**
- » **Ryan Freedman**, Chairman & CEO, **Corigin**

12:30pm - 1:30 pm



Networking Lunch

1:30pm - 2:00pm

Independent Sponsors in a Funded World - the Deal Journey Into an Investor. What Makes for a Successful Partnership?

- » **Moderator: Adam Smith**, Partner, CEO, **Circle Peak Capital LLC**
- » **David Acharya**, Partner, **AGI Partners**
- » **Brian Kerr**, Managing Director, **ORIX Mezzanine & Private Equity**
- » **Noah J. Kroloff**, Managing Director, **Black Granite Capital**

2:00pm - 2:30pm

In-house vs OCIO: Selecting the Right Approach for Your Family Office

- » **Moderator: Pietro Cinquegrana**, Managing Director, **CDIB Capital International**
- » **Brandon Laughren**, Chief Investment Officer, **The Laughren Group**
- » **Ryan Kriser**, Founder & CEO, **Helios Investment Partners**
- » **Adam Koopersmith**, Partner, **Pritzker Group Venture Capital**

2:30pm - 3:00pm

Independent Sponsor Economics: Winning investors, Deal Financing & Maintaining Control

- » **Moderator: Drew Brantley**, Partner, **Frisch Capital Partners**
- » **Brian T Bristol**, Managing Director and Co-founder, **NY Private Finance**
- » **Mark Hauser**, Founder and Managing Director, **Tamarix Capital**
- » **Gilbert Klemann**, Managing Partner, **GHK Capital Partners**

3:00pm-3:30pm

Afternoon Networking Break

3:30pm - 4:00pm

Family Offices as Fund Investing LPs

- » **Adam Fried**, Partner, **The K fund**
- » **Tom Wisniewski**, Managing Partner, **Rosepaul Ventures**

4:00pm - 4:45pm

Afternoon Roundtables

- Co-Investments: In the trenches
 - » **Adam Fried**, Partner, **The K fund**
- Emerging Market Co-investments
 - » **Shaun Khubchandani**, Principal, **Siguler Guff**
- Early Stage Investing for HNW Individuals and Family offices
 - » **SC Moatti**, Founder & Managing Partner, **Mighty Capital**
- Shark Tank Funds - Open Forum
- Shark Tank Firms - Open Forum

4:45pm - 5:15pm

Closing Keynote:

Family Office Education 2.0

- » **Moderator: John D'Agostino**, Global Head of Investor Engagement, **DMS Governance**
- » **Gabrielle Rubenstein**, Co-Founder and Chief Executive Officer, **Manna Tree Partners**

5:15pm - 6:30pm

Closing Cocktail Reception