

Day 1 | Wednesday, June 17

- 3:30 pm **ExecConnect LP-GP Meetings:**
A 2-hour time slot of LP-GP meetings for participants in the ExecConnect Program
- 6:00 pm **Welcome reception**

Day 2 | Thursday, June 18

- 7:30am **Registration & networking breakfast**
- 8:35am **PEI welcome remarks**
- 8:40am **PEI data presentation**
- The head of PEI's Research and Analytics Team (R&A) will share the latest data on PE and VC fundraising, deals, and exit trends.
- » **Speaker: Craig Savitzky**, Research Manager, Americas, PEI
- 8:55am **Opening keynote**
- 9:30am **We're here! LPs discuss their PE and VC allocations in an unprecedented market**
After 11 years, the bull-market has come to an end. How does this effect the private markets? LPs will discuss:
- How they're thinking about their PE and VC allocations
 - What sectors, strategies, and vintages are better off
 - How they are de-risking, whether it be to increase or decrease their PE and VC allocations
 - How they are approaching new fund commitments, co-investment, and secondaries
- » **Panelist: Julia Cormier**, Director, Alternative Investments, Russell Investments
- 10:00am **Creative deal sourcing and exit strategies in times of extreme uncertainty**
- How has deal sourcing and the types of deals available changed?
 - Has there been a bigger shift in deals available in a particular segment of the market?
 - Exits are certainly harder to come by than previously - Where does the exit market stand?
 - What creative exit strategies are becoming or are set to become more common?
 - Who are the most active buyers?
- » **Panelist: Evan Harwood**, Managing Director - Investments, Equity Group Investments (SFO)



PARTNER CONNECT MIDWEST 2020

June 17 - 18 | Chicago, Illinois

Agenda

10:30am

Investing with Emerging Managers: What does the data show? Does it differ for PE and VC?

New and MWBE managers are getting increasing funding, awareness and are becoming a more powerful force in the wider landscape. LPs who have a focus on these types of managers will discuss:

- What the data shows for first- and second-time fund managers
- How diversity and inclusion benefits both society and fund performance
- Examination of new managers in PE and VC and if a particular segment of the market outperforms

» **Panelists: Todd Roland**, Principal, Private Equity Investments, GCM Grosvenor

» **G. Scott Tabor**, Senior Vice President, Private Equity, FEG

11:30am

The first 100 Days: strategies for managers of all sizes to kickstart performance

A group of PE and VC fund managers of varying sizes will discuss:

- Practical strategies and tools for managers with varying resources and operational capacity
- What they tackle in the first 100 days and how important they feel this period is
- Specific examples of things managers should and shouldn't do in this period

» **Panelist: Mike Hollander**, Managing Director, GTCR

12:00pm

Networking luncheon

1:15pm

Debate: specialist vs generalist managers

Jack of all trades or master of none? Is it ever that simple? Two LPs, one specialist GP and one generalist GP will debate the pros and cons of each strategy in private equity.

» **Panelists: Nat Kellogg**, Director of Manager Search, Managing Partner, Marquette Associates

» **Mo Wilkie**, Vice President, Private Equity Group, 50 South Capital

» **Moderator: Ryan Bell**, Managing Director, Barings



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1:45pm

Faith Based LPs: Best practice for GPs to work with this type of institutional investor

Faith-based institutions have large amounts of capital and are active allocators to the private markets. Three faith-based LPs will discuss:

- How they differ from a non-faith-based LP
- What specific considerations are made when allocating to PE and VC
- Types of investments by fund managers that may disqualify them from a capital commitment

» **Panelist: Timothy Bray**, Senior Portfolio Manager, Private Markets, GuideStone

2:15pm

Afternoon networking break

2:45pm

Early vs late stage venture: What's best for fundraising, deals, and talent?

An LP, an early-stage VC and a late-stage VC will discuss:

- Where are most LP dollars going and what kind of LPs are interested in early and late stage venture?
- Where are the quality deals in the venture space?
- What affect do the market conditions have on viable early and late stage investments?
- What type of VC firm is top talent favoring?

» **Panelists: Paul Bodnar**, Director of Investments & Private Capital, CM Wealth Advisors

» **John Frankel**, Founding Partner, ff Venture Capital

» **Moderator: Brian Smiga**, Co-Founding Partner, Alpha Venture Partners

3:15pm

The state of private debt

- Who is investing in the space
- Who the main recipients of private debt are
- New strategies, opportunities, and risks
- How market shifts affect the wider market
- What the next 1, 3, and 5 years hold

» **Panelist: Brendan Carroll**, Senior Partner and Co-Founder, Victory Park Capital



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- 3:45pm **Afternoon regroup**
- 4:00pm **Academia to reality: Professor Sugata Ray data presentation**
Professor Sugata Ray has conducted wide ranging research in the area of behavioral finance. He will be presenting two of his studies that examine executive pay at pensions systems as well as how certain personality traits and spending habits may affect manager return.
» **Keynote Speaker: Sugata Ray**, Assistant Professor of Finance, University of Alabama
- 4:30pm **Fireside chat with Anne-Marie Fink, SWIB's Managing Director of Private Markets and Funds Alpha**
The newly appointed head of SWIB's entire external fund manager portfolio will sit down with a Buyouts editor to discuss SWIB's latest thinking on private equity, venture capital, and private debt fund and co-investing.
» **Keynote Speaker: Anne-Marie Fink**, Managing Director, Private Markets & Funds Alpha, State of Wisconsin Investment Board (SWIB)
- 5:00pm **All conference cocktail reception**



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