

Women in Private Markets Summit North America 2023

20 - 21 June | New York

Showcasing diverse talent across private markets

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REALIZING POTENTIAL IN PRIVATE MARKETS

The worlds' leading diversity event focused on alternatives; the Women in Private Markets Summit is coming to North America in 2023. Join over 500 attendees from across private markets for an unrivalled networking opportunity.

The inaugural **Women in Private Markets Summit: North America** will feature co-located Women in Private Equity, Women in Infrastructure, Women in Real Estate and Women in Private Debt Forums. All registered attendees will have access to the four forums, allowing you to build your network across alternative asset classes.

"No other event has the energy and insights that this one does. It is a terrific opportunity to spend time with the brightest women in the business, to connect with people you have only seen on a Zoom, and to make new friends and clients"

Laurie Mahon (CIBC Capital Markets)

"Excited to be a part of the inaugural North American Women in Private Markets Summit to connect, network, and learn from experts in the industry"

Leslie Vargas (Resolution Life US)

"Inclusive conversations that set the stage for tomorrow's opportunities today"

Kemi-Christina Abdul (BlueHaven)

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Confirmed Speakers

Leslie Vargas, CFA, Portfolio Manager, **Resolution Life US**
Kristin Olson, Head of Alternative Capital Markets, **Goldman Sachs Private Wealth Management**
Patricia Miller Zollar, Managing Director, Private Equity, **Neuberger Berman**
Kathryn Liao, Managing Principal, Private Equity Group, **Allstate**
Jennifer Hartviksen, Managing Director, Global Credit, **IMCO**
Christie Chen, Director of Investments, **Oxford Properties Group**
Lan Cai, Deputy Chief Investment Officer, **The Pension Boards – United Church of Christ**
Mina Nazemi, Head of Diversified Alternative Equity, **Barings**
Danielle Even, Principal, Real Estate Investments, **GCM Grosvenor**
Nicole Byrns, Managing Director, Capital Solutions | Credit Investments, **CPPIB America**
Lane McDonald, Managing Director, Strategy & Operations, **Omers**
Lara Pollock, Associate, **Alaska Permanent Fund Corporation**
Mary Kathleen (MK) Flynn, Editor-in-Chief, **PE Hub**
Melissa Grant, Portfolio Advisor, **Aksia**
Daphne Tong, Partner & Co-Head of Private Equity, **WestCap**
Liz Campbell, Managing Director, Co-Head of U.S. Primaries, **Portfolio Advisors**
Kemi-Christina Abdul, Managing Director, **BlueHaven**
John Anderson, Global Head of Corporate Finance and Infrastructure, **Manulife**
Kristina Matthews, Managing Director, Head of Investor Relations and ESG, **Brightwood Capital**

Advisors

Lynn LaChapelle, Managing Director, Capital Markets, **JLL**
Sara Zulkosky, Co-Founder & Managing Partner, **Recast Capital**
Ming Yan, Managing Director, **Cambridge Associates**
Marina Vannucci, Director of Private Equity, **Swiss Re**
Sophia Mullen, President, Head of Co-Investment Research, **EnTrust Global**
Dan Winters, Senior Director, **GRESB**
Ashli Aslin, Senior Analyst Real Assets and Infrastructure, **Albourne**
Laurie Mahon, Vice Chair, Global Investment Banking, **CIBC Capital Markets**
Sheryl A. Mejia, Managing Partner, **Steward Asset Management**
Sweta Chanda, Managing Director, Head of Business Strategy, **Monroe Capital**
Leticia Ferreras Astorqui, Vice President / Portfolio Manager - Development Finance, **Allianz Global**

Investors

Jackie Rantanen, Head of Product Solutions – Co-Head of Impact Investments, **Hamilton Lane**
Mansi Patel, Managing Director, **Metlife Investment Management**
Hallie Ransone, Portfolio Manager, Private Credit, **Liberty Mutual Investments**
Michelle Noyes, Managing Director, Head of Americas, **AIMA**
Laura Held, Partner, Executive Committee, **Shamrock Capital**

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Amy Buckner Chowdhry, Founder & CEO, **Answerlab**

Merche Del Valle, Former, **Chief HR and Talent officer**

Irene Mavroyannis, Managing Partner, Private Capital Advisory, **Sera Global**

Tanya Carmichael, Advisor, **Independent**

Gila Cohen, Chair, Investment Advisory Board, **MUFG**

Michelle Jacobi, Managing Director, **Gatewood Capital**

Aiyu Yuan Nicholson, Partner, **StepStone Group**

Nathalie Viens, Operating Partner, **CDPQ**

Huda Al Lawati, Founder, **Aliph Capital**

Agenda

08.00

Registration and coffee

08.45

PEI Welcome

8:50

Chairperson's opening remarks

Laurie Mahon, Vice Chair, Global Investment Banking, **CIBC Capital Markets**

9:00

Keynote Investor Interview: why a leading investor is committed to private markets

9:25

Asset allocations to private markets in a more challenging environment

- To what extent has the slump in equities led investors to sell off holdings in private markets?
- Does appetite for co-investment remain high?
- How can managers differentiate themselves in a crowded field?
- Have investors turned down funds due to lack of diversity? What pressure are they putting on?

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Leslie Vargas, CFA, Portfolio Manager, **Resolution Life US**
Kathryn Liao, Managing Principal, Private Equity Group, **Allstate**
Ming Yan, Managing Director, **Cambridge Associates**
Lara Pollock, Associate, **Alaska Permanent Fund Corporation**

10:05

How are industry leaders addressing diversity in their institutions?

- Is the industry doing enough to drive change?
- Are investors' demands on diversity increasing?
- Case studies of innovative recruiting to ensure diverse candidate pools
- Tips for success in your career in private markets

John Anderson, Global Head of Corporate Finance and Infrastructure, **Manulife**

10:45

Coffee & Networking

The exhibition area will be split into areas based around the 4 asset classes covered at the event for informal networking during the coffee break

11:30

State of private markets: where are we now?

- How are managers changing strategies to deal with inflation and increasing interest rates?
- To what extent is the democratization of private markets a positive and current trend?
- What does the rise of sustainability mean for investment strategy in practice?
- Fundraising and dealmaking predictions for the next 18 months
- How will private markets emerge from this financial crisis?

Jackie Rantanen, Head of Product Solutions – Co-Head of Impact Investments, **Hamilton Lane**
Patricia Miller Zollar, Managing Director, Private Equity, **Neuberger Berman**

12:10

How there is increased pressure on ESG from all angles in North America

- Investor commitments and tighter scrutiny on ESG
- How the regulatory agenda is pivoting to enforcement practices
- To what extent are lenders challenging borrowers on ESG risk management due to commitments and regulatory obligations?
- The danger of losing the license to operate

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- How big a threat is the anti-ESG backlash to progress in US businesses more generally?

Tanya Carmichael, Advisor, Independent

12:45

Lunch

<p> Women in Infrastructure Forum North America 2023</p> <p>13:40 Opening remarks</p>	<p> Women in Private Equity Forum North America 2023</p> <p>13:40 Opening remarks Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub</p>	<p> Women in Real Estate Forum North America 2023</p> <p>13:40 Opening remarks</p>	<p> Women in Private Debt Forum North America 2023</p> <p>13:40 Opening remarks</p>
<p>13:45 The state of play in the North American infrastructure market Kemi-Christina Abdul, Managing Director, BlueHaven</p>	<p>13:45 The state of play in North American private equity Melissa Grant, Portfolio Advisor, Aksia</p>	<p>13:45 The state of play in North American real estate Gila Cohen, Chair, Investment Advisory Board, MUFG Danielle Even, Principal, Real Estate Investments, GCM Grosvenor</p>	<p>13:45 The state of play in North American private credit Hallie Ransone, Portfolio Manager, Private Credit, Liberty Mutual Investments Jennifer Hartviksen, Managing Director, Global Credit, IMCO</p>
<p>14:25 Short turnaround break</p>			
<p>14:30 How has the Inflation Reduction Act created opportunities in renewables?</p>	<p>14:25 Examining the opportunity of the democratization of private equity Kristin Olson, Head of Alternative Capital Markets, Goldman Sachs Private Wealth Management</p>	<p>14:25 The future of offices North America: where are opportunities in a rapidly evolving market?</p>	<p>14:25 Diversifying your portfolio and selecting strategies for 2023 and beyond Michelle Noyes, Managing Director, Head of Americas, AIMA Lan Cai, Deputy Chief Investment Officer, The Pension Boards – United Church of Christ Nicole Byrns, Managing Director, Capital Solutions Credit Investments, CPPIB America</p>

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<p>15:10 Short turnaround break</p>			
<p>15:15 How infrastructure managers can invest across the digital ecosystem Mina Nazemi, Head of Diversified Alternative Equity, Barings</p>	<p>15:15 How and why does appetite for co-investments continue to increase? Anna Dayn, Managing Partner, New End Liz Campbell, Managing Director, Co-Head of U.S. Primaries, Portfolio Advisors Sophia Mullen, President, Head of Co-Investment Research, EnTrust Global</p>	<p>15:15 Will rising interest rates and a slowing economy bring an end to the warehouse bubble?</p>	<p>15:15 ESG & impact integration: sustainability linked loans & more Leticia Ferreras Astorqui, Vice President / Portfolio Manager - Development Finance, Allianz Global Investors Kristina Matthews, Managing Director, Head of Investor Relations and ESG, Brightwood Capital Advisors</p>
<p>15:50 Coffee & networking</p>			
<p>16:10 Why the North American midmarket remains a happy hunting ground Irene Mavroyannis, Managing Partner, Private Capital Advisory, Sera Global Ashli Aslin, Senior Analyst Real Assets and Infrastructure, Albourne</p>	<p>16:10 Assessing the environment for emerging managers in North America Michelle Jacobi, Managing Director, Gatewood Capital Aiyu Yuan Nicholson, Partner, StepStone Group Sara Zulkosky, Co-Founder & Managing Partner, Recast Capital Sheryl A. Mejia, Managing Partner, Steward Asset Management</p>	<p>16:10 Is life sciences a trend or here to stay? Christie Chen, Director of Investments, Oxford Properties Group Lynn LaChapelle, Managing Director, Capital Markets, JLL</p>	<p>16:10 Evaluating opportunities away from corporate credit</p>
<p>16:50 Short turnaround break</p>			

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<p>17:10 Does infrastructure debt continue to outperform other credit strategies? Mansi Patel, Managing Director, Head of U.S. Infrastructure and Project Finance, Metlife Investment Management</p>	<p>17:10 Venture & growth equity: latest trends in North America Daphne Tong, Partner & Co-Head of Private Equity, WestCap</p>	<p>17:10 Sustainability and the race to net-zero in real estate Dan Winters, Senior Director, GRESB</p>	<p>17:10 Sponsorless vs. sponsored lending: are macro pressures affecting opportunities for sponsored lenders?</p>
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17:40

Cocktail reception with themed networking around areas of interest

Day Two

08:00-9:00

Invitation only think-tanks

These sessions will allow women to speak freely about the issues impacting their office and asset class. It is a closed door, open conversation where attendees can benchmark ideas and share best practices to gain solutions for common concerns.

- Infrastructure
- Private Equity
- Private Debt: Sweta Chanda (**Monroe Capital**)
- Real Estate

9:10

Secondaries: finding value in a competitive market

- Increased specialization in strategies: how are firms approaching this and what is LP appetite like for specialist plays?
- Real asset and private debt: what are the dynamics of these asset classes from a secondaries perspective and how much more growth can they support?
- What do falling equity markets and wider economic stress mean for LP sales and GP-leds?
- Investor perspectives on continuation funds and other innovations
- What are the significant headwinds the market could face over the next 12 months?

Marina Vannucci, Director of Private Equity, **Swiss Re**

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9:45

Fundraising in a hybrid world

- Has covid fundamentally changed fundraising?
- Building a truly global investor base, tips and war stories from the past two years
- The importance of a tailored, quality customer service and communications
- ESG – increasing demands for targets, data and transparency in private markets
- Adapting to a more challenging economic environment

10:20

PEI Fundraising Report

10:30

The rise and rise of impact investing in North America and globally

- Comparing mega funds to more niche impact players
- Is launching an impact strategy detrimental to wider sustainability efforts?
- Are ESG and impact different enough to warrant separate strategies and teams?
- What are leading impact managers doing to align with the needs to their LPs?
- How are pension funds integrating impact into their investment mandates?

Nathalie Viens, Operating Partner, **CDPQ**

11:15

Coffee & networking

The exhibition area will be split into areas based around the 4 asset classes covered at the event for informal networking during the coffee break

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Founders panel: Setting up your own fund in private markets

- Motivations and challenges when becoming a founder
- Outlining the fundraising process for a new fund
- What do founders see as the most exciting opportunity in a challenging environment?
- Learnings and war stories from those that have done it

Huda Al Lawati, Founder, **Aliph Capital**

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12:30

Investment case study: Shamrock Capital Partners & AnswerLab

In 2022, Shamrock Capital announced a strategic partnership with AnswerLab, a leading user experience research firm. Answerlab has a female founder and CEO who prioritised DEI initiatives. AnswerLab Specifically chose Shamrock as a partner for the investment because it has a firm that's DEI results back up what it says to investors. This unique discussion will feature dynamic duo who can delve into strategically executing DEI in private equity, the importance of choosing your partners, and advancing initiatives as a woman in private markets.

Laura Held, Partner, Executive Committee, Shamrock Capital

Amy Buckner Chowdhry, Founder & CEO, Answerlab

13:00

Networking Lunch

14:00

Meet a Mentor Session

This unique session will split the room up into tables with a senior representative on each table offering practical career advice to the table. This will provide a unique opportunity to build your network and tables will be led by people with different areas of expertise.

John Anderson, Global Head of Corporate Finance and Infrastructure, Manulife

Rest TBC

14:45

Themed roundtable discussions

Roundtables discussing a variety of topics over lunch led by an expert moderator

- How to drive diversity in private markets
Merche Del Valle, Former, Chief HR and Talent officer
- Value creation in private markets
Lane McDonald, Managing Director, Strategy & Operations, Omers
- Tips for fundraising success
- Making sense of ESG regulation
- Secondaries investing

15:30

Close of conference