Private Equity International

PEI

NEXUS 2024

NEXUS 2024 is set to redefine the LP/GP connection in Orlando on March 6-8

Amid unprecedented macro pressures on fundraising and deals, there's never been a greater need for the private equity industry to come together to drive the asset class forward.

The NEXUS 2024 Summit brings Private Equity International's 20+ years convening experience and connection with private markets to life in Orlando.

No other summit will deliver such a sophisticated agenda with true pioneers of industry steering the conversation and program of tailored networking.

Jonathan Gray
President and
Chief Operating Officer
Blackstone

Howard Marks
Co-Founder & Co-Chairman
Oaktree Capital Management

David Rubenstein
Co-Founder & Co-Chairman
The Carlyle Group

The NEXUS difference - A speaking faculty like no other

Nowhere else will you get these industry titans in one place, at one time.

From the founders and senior leaders at the biggest fund managers in private equity to the Chief Investment Officers of the largest LPs allocating to the asset class, you will hear from both sides of the LP/GP relationship.

Jonathan Gray
President and
Chief Operating Officer
Blackstone

Howard Marks
Co-Founder & Co-Chairman
Oaktree Capital Management

David Rubenstein
Co-Founder & Co-Chairman
The Carlyle Group

Britt Harris
Acting Chief Executive Officer and Chief Operating Officer
Texas Permanent School Fund Corporation

Christopher Ailman
Chief Investment Officer
California State Teachers' Retirement System (CalSTRS)

Lori Hall-Kimm
Senior Managing Director,
Head of Global Private Equity
Healthcare of Ontario Pension Plan (HOOPP)

Lamar Taylor
Interim Executive Director &
Chief Investment Officer
Florida State Board of Administration

Kim Hourihan
Chief Investment Officer
CBRE Investment Management

The NEXUS difference – A summit built for connections

Built off PEI's 20+ years of experience connecting private equity LPs and GPs, NEXUS will create the ideal networking experience for capital to flow into the asset class. Hosted in the warmth of Florida, the conference will feature superior content and speakers in unique indoor and outdoor settings.

PEI delivered a well-organized event, balancing between sessions on pertinent topics with industry leaders, as well as ample networking time. Highly recommended.

Marilena Ioannidou
British Business Bank

NEXUS Grand Opening

The Grand Opening will kick off NEXUS surrounded by the breathtaking views of the Grande Lakes outdoor stage. Enjoy a festival of food and drink alongside unmatched speakers, content, and networking.
Don't be late!

PEI Group charity golf tournament

Tee off at the Ritz Carlton Golf Course, the same course that hosts the PGA Tour's PNC Championship each year. Test your mettle on the Greg Norman designed course where Tiger Woods, John Daly, Justin Thomas, and the PGA Tour's best battle it out each year.

Sustainable Culinary Experience: 'Garden to Table'

Curated by Executive Chef Bir Yadav, the JW Garden to Table experience begins with a guided tour of the flourishing JW Garden, led by Chef Bir and two of the resort's dedicated Herb Gardeners.

The NEXUS difference - Built off 20+ years convening power

The pre-eminent convening force in private equity

PEI Group is the most respected voice in the industry with the deepest, widest connection to both LP and GP sides of the market. We are bringing 20+ years experience of connecting private equity decision-makers to make sure NEXUS 2024 will help you learn, network, make connections and do better business.

20+ Years of experience convening and informing GPs and LPs

3,000+ US LPs in our database with allocation and strategy data

11,000+ Global organizations rely on PEI Group knowledge and networking each year

100,000+ Private markets decision-makers at our global events in last 5 years

Private Equity International

NEXUS 2024

Deep insight. New opportunities. Focused connections.

NEXUS 2024 is the new home for private equity in North America. Connect with more than 800 of the most influential investors, managers and service providers in the asset class in Orlando on March 6-8, 2024.

The unique agenda is built off *Private Equity International* and PEI Group's deep connection to industry, delivering three days of distinct insight into global private equity markets and tailored networking that you can't get anywhere else.

With 2024 being a pivotal year for private equity – Q1 is the perfect moment to reassess your strategy, focus on connections that will be most productive for portfolio construction, and gather the intel around burgeoning opportunities.

Industry-leading speakers include:

Jonathan Gray, *President and Chief Operating Officer*, **Blackstone**

Orlando Bravo**,** *Co-Founder & Managing Partner***, Thoma Bravo**

Scott Nuttall**,** *Co-Chief Executive Officer***, KKR**

Howard Marks, *Co-Founder & Co-Chairman*, **Oaktree Capital Management**

David Rubenstein, *Co-Founder & Co-Chairman*, **The Carlyle Group**

David Mussafer**,** *Chairman and Managing Partner***, Advent International, L.P.**

Christopher Ailman, *Chief Investment Officer*, **California State Teachers' Retirement System (CalSTRS)**

Lamar Taylor, *Interim Executive Director & Chief Investment Officer*, **Florida State Board of Administration**

Chip Kaye, *Chief Executive Officer*, **Warburg Pincus**

Steven Meier, *Chief Investment Officer and Deputy Comptroller* for **Asset Management New York City Retirement Systems**

Britt Harris, *Founder and Chief Executive Officer*, **On Eagles Wings**

Jennifer Choi, *Chief Executive Officer*, **Institutional Limited Partners Association (ILPA)**

Bill Kelly, *Chief Executive Officer*, **CAIA**

Dr. Indermit Gill, *Senior Vice President of Development Economics and Chief* Economist of the **World Bank Group**

Sherrese Clarke Soares, *Founder & Chief Executive Officer*, **HarbourView Equity Partners**

Dana Johns, *Head of Private Equity*, **The New Jersey Department of the Treasury's Division of Investment**

PEI

To learn more, visit:
privateequityinternational.com/NEXUS/

For registration questions:
Anna Dorokhin
anna.d@pei.group

For sponsorship inquiries:
Jimmy Kurtovic
jimmy.k@pei.group

For speaking opportunities:
Jenna Williams
jenna.w@pei.group

Scott Anderson, *Chief Investment Officer*, **North Dakota Retirement and Investment Office**

Chris Eckerman, *Senior Portfolio Manager, Head of Co-Investments*, **State of Wisconsin Investment Board (SWIB)**

Eric Liu**,** *Partner, Head of North American Private Equity, and Co-Head of Global Healthcare,* **EQT**

Eric Lang**,** *Senior Managing Director, Private Market***, Teachers Retirement System of Texas**

Nigel Dawn**,** *Senior Managing Director, Head of Capital Advisory* Group**, Evercore**

Rudina Seseri, *Founder and Managing Partner*, **Glasswing Ventures**

Daniel Goldstein, *Chief Executive Officer*, **Go ESOP LLC**

Lori Hall-Kimm, *Senior Managing Director, Head of Global Private Equity*, **Healthcare of Ontario Pension Plan (HOOPP)**

Prasanna Ramaswamy, *Managing Director, Head of Technology & Data***, CPP Investments**

Matthew Liposky, *Chief Investment Operating Officer*, **Massachusetts Pension Reserves Investment Management**

Max Miller, *Managing Director, Growth Equity*, **CPPIB**

Beatrice Mitchell, *Co-Founder and Managing Director*, **Sperry Mitchell & Company Inc.**

Andrew Palmer, *Chief Investment Officer*, **Maryland State Retirement and Pension System**

Kim Hourihan, *Chief Investment Officer*, **CBRE Investment Management**

Sue Crotty, *Senior Vice President and Chief Investment Officer***, Segal Marco Advisors**

Hans Kobler, *Founder and Managing Partner*, **Energy Impact Partners**

Anna Barath**,** *Chief Investment Officer***, Bite Investments**

Marcus Felder, *Principal, Portfolio Operations*, **Blackstone**

Bei Saville, *Chief Investment Officer*, **Advance**

Mary D'Onofrio, *Partner*, **Bessemer Venture Partners**

Yann Robard, *Managing Partner***, Whitehorse Liquidity Partners**

Tadasu Matsuo, *Managing Director, Head of Global Alternative Investments***, Japan Science & Technology Agency**

Peter Keehn, Senior *Managing Director, Private and Alternative Assets*, **Allstate Investments**

Harj Shoan, *Senior Managing Director, Private Capital,* **Ontario Teachers' Pension Plan (OTPP)**

Paul Sanabria, *Senior Managing Director and Global Co-Head of Secondaries*, **Manulife**

Tarrus Richardson***,*** *Founder and Chief Investment Officer***, IMB Partners**

Robert "Vince" Smith, *Deputy State Investment Officer and Chief Investment Officer*, **New Mexico State Investment Council (NMSIC)**

Chris Voss, *Founder and Chief Executive Officer*, **The Black Swan Group**

Pierre-Ettienne Franc, *Chief Executive Officer*, **Hy24**

Todd Abbrecht**,** *Co-Chief Executive Officer*, **Thomas H. Lee Partners**

Venus Phillips, *Managing Director*, **The Kresge Foundation**

Allen Waldrop, *Director of Private Equity*, **Alaska Permanent Fund Corporation**

Lorine Pendleton**,** *Founder and Managing Partner*, **125 Ventures**

Amol Helekar**,** *General Partner***, TCV**

Robert Blaustein**,** *Partner, Investment Funds Practice Group***, Kirkland & Ellis LLP**

Stephanie Geveda**,** *Founder and Managing Partner***, Coalesce Partners**

Jan Stahlberg**,** *Founder and Managing Partner***, Trill Impact**

Tori Buffery, *Partner*, **Morningside Capital**

Raelan Lambert, *Senior Partner and Global Alternatives Leader*, **Mercer**

Neal Graziano, *Managing Director, Private Assets*, **W.K. Kellogg Foundation**

Samantha Davidson**,** *President and Head of Global Investing***, Cambridge Associates**

Sophia Tsia, *Managing Director*, **Trinity Church Wall Street**

Reuben Munger, *Managing Partner and Chief Investment Officer*, **Vision Ridge**

Agha Khan, *Managing Director and Co-Head of Private Equity*, **Stone Point Capital**

Ya Tung, *Chief Investment Officer*, **The Jefferies Family Office**

Mark Boyagi**,** *Partner, Investment Funds Group***, Kirkland & Ellis LLP**

Anna Totdahl, *Investment Officer, ESG & Sustainability*, **Oregon State Treasury**

Robert Burd, *Deputy Chief Investment Officer*, **Maryland State Retirement and Pension System**

Lydia Guett**,** *Head of Growth***, Systemiq Capital**

Kate Faust, *Partner,* **Rockwood Equity Partners**

Luke Myers, *Co-Founder and Managing Partner*, **Truelink Capital**

Robert Mellema, *Managing Director*, **CPP Investments**

Geeta Kapadia, *Chief Investment Officer*, **Fordham University**

Anna Dayn, *Managing Partner and US Head*, **New End**

Zach Barasz, *Partner***, G2 Venture Partners**

Elizabeth Weymouth, *Founder & Managing Partner*, **Grafine Partners**

Tjarko Hektor**,** Partner**, New 2ND Capital**

Keith Williams, *Managing Partner and Co-Chief Investment Officer***, Crestline**

Doug Kimmelman**,** *Founder and Senior Partner***, ECP**

Steve Poliner, *Senior Investment Counsel*, **Teacher Retirement System of Texas**

Isabelle Scemama**,** *Global Head***, AXA IM Alts**

Jasmine Robinson**,** *Co-Founder and Managing Partner***, Monarch Collective**

David Fann, *Vice Chairman, Senior Managing Director*, **Apogem Capital**

Carl Williams, *Partner and Co-Founder***, Sandbrook Capital**

Claire Ngo, *Managing Director*, **Temasek**

Ken Pontarelli, *Global Head of Sustainable Investing*, **Goldman Sachs Asset Management**

Pamela Hendrickson, *Vice Chairman*, **The Riverside Company**

Joost Bergsma, *Chief Executive Officer and Managing Partner*, **Glennmont Partners from Nuveen**

Matthew Coyne, *Managing Director*, *Portfolio Advisory*, **Aksia**

Steve Russo, *Executive Director*, **Indiana Public Retirement System**

Michael Bologna, *Chief Investment Officer*, **NovaQuest Capital Management**

Tyler Zachem, *Chief Executive Officer and Founder*, **Broad Sky Partners**

Elizabeth Burton**,** *Managing Director and Senior Client Investment Strategist*, Client Solutions Group, **Goldman Sachs Asset Management**

Anne Philpott**,** *Managing Director, Junior Capital and Private Equity Solutions***, Churchill Asset Management**

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

Ben Perl**,** *Managing Director and Global Co-Head of Secondary Private Equity***, Neuberger Berman**

Andi Klein**,** *Managing Partner, Head of Triton Smaller Mid-Cap***, Triton Partners**

Dr. Lucas Joppa, Chief Sustainability Officer and Senior Managing Director**, Haveli Investments**

Zorian Rotenberg**,** *Operating Partner- GTM & Revenue Growth*, **Charlesbank Capital**

Suzanne Yoon**,** *Founder and Chief Executive Officer***, Kinzie Capital Partners**

Sona Menon**,** *Head of Pension Practice, North America*, **Cambridge Associates**

Drew Scielzo, *Operating Partner*, **Acon Investments**

John Stott, *Partner*, **Arctos Partners**

David Eriquez**,** *Partner***, Clipway**

Milwood Hobbs, Jr**.,** *Managing Director and Head of Sourcing & Origination***, Oaktree Capital**

Daniel Perry, *Director, Sales and Commercial Excellence*, **Parthenon Capital**

Alok Singh**,** *Co-Founder, Chief Executive Officer and Chief Investment Officer*, **Bridge Growth Partners**

Kendra Corbett**,** *Partner***, Cloverlay**

Patrick Jordan**,** *Managing Partner and Chief Operating Officer***, NovaQuest Capital Management**

Andy Unanue, *Founder and Managing Partner*, **AUA Private Equity Partners**

Felix Zhang, *Partner, Alternative Credit*, **Ares Management**

Grady Frank, *Partner and Head of Private Credit Origination*, **GoldenTree Asset Management**

David Herbers, *Managing Director, Secondaries Group*, **Ares Management**

Andrew Siwo, *Head of Sustainable Investments and Climate Solutions*, **New York State Common Retirement Fund**

Veronica Li, *Head of North America*, **Primavera Capital Group**

David Miller**,** *Global Head of Private Credit & Equity***, Morgan Stanley**

Sebastiaan van den Berg**,** *Partner, Co-Head GP Equity Solutions***, Astorg**

Mark Buchanan, *Managing Director, Head of ESOP Investment Banking*, **Stout**

Regina Carls, *Managing Director, ESOP Advisory Group Head*, **J.P. Morgan**

Daniel Pietrzak, *Partner, Global Head of Private Credit,* **KKR**

Kyongdo Min, *Senior Portfolio Manager*, **Maryland State Retirement and Pension System**

Bryan High, *Head of Capital Solutions*, **Barings**

Dean Giovanniello, *Senior Principal, Financial Institutions Consulting Services*, **IQVIA**

Steve Richman, *Partner*, **Seyfarth**

Agenda

March 6-8, 2024 | JW Marriott Orlando, Grande Lakes | Orlando, FL

Wednesday, March 6	
9:30 am	**LP Council Registration Opens**
10 am – 1 pm	**Limited Partners Council** Investor Leadership Council & Workshop with world-leading negotiation expert Chris Voss (LPs only) Exclusively for investors, the peer-to-peer Investor Council will comprise strategy-building roundtables that deep dive into contract negotiation tactics, gaining transparency, and re-analyzing portfolio construction/due diligence approaches to partnerships. **10 am – 11 am** **Negotiation Presentation: The Newfound Power** Please join the world's leading negotiator, Chris Voss, on developing the allocators' newfound power within partnerships that can be built on value creation and integrity. **Facilitator:** **Chris Voss**, Founder, Chief Executive Officer, **The Black Swan Group** **11:05 am – 11:55 am** **Keynote Panel: Top of Mind 2024 – Re-Strategizing the portfolio and optimizing due diligence in the market landscape** As we head into closing the first quarter of H1, engage in best practices for analyzing the market and board decision-making as it parlays into considerations for re-strategizing or adjusting portfolio construction around private markets, predominantly Private Equity. Within that landscape, we can further look at the best ways to reassess our management profiles, investment performance and understand the due diligence needed to better onboard and uniquely collaborate in the partnership. We further deep dive on establishing cash flow and where CIO and CIOO can better align to increase transparency and request more from GPs.

	Moderator: **Sue Crotty,** Senior Vice President and Chief Investment Officer**, Segal Marco Advisors** **Panelists:** **Lamar Taylor**, Interim Executive Director & Chief Investment Board, **Florida State Board of Administration** **Matthew Liposky**, Chief Investment Operating Officer, **Massachusetts Pension Reserves Investment Management (Mass PRIM)** **Robert "Vince" Smith**, Deputy State Investment Officer and Chief Investment Officer**, New Mexico Investment Council** **Scott Anderson**, Chief Investment Officer, **North Dakota Retirement and Investment Office** **12 pm – 12:30 pm** **Lunch and Presentation: Leading with leverage – The power playbook to gaining the most optimal fund terms** As allocators aim to transition to a changing fundraising environment, it is essential to focus on building best negotiations for targeted transparency and aligned expectations. Be empowered to gain a deeper understanding of where GPs interests will lie (e.g. in reducing both fund formation costs and length of side letter agreements) and how best to address points of contention for exclusive access to creative fund structures, lower fee rates and preferred decision-making deadlines. **Leader: Steve Richman**, Partner, **Seyfarth** **12:30pm – 1pm** **Working Groups Lunch: The strategic secrets that guide successful negotiations and portfolio decision-making** Roundtable 1: Determining quantifiable key performance metrics for re-upping decisions, commitment size and shifting capital Roundtable 2: Investors' reengagement on DPI and ensuring money back from the PE portfolio: successful exit strategies Roundtable 3: Navigating the increased competition for deals in niche sectors Roundtable 4: Culling the portfolio: Determining who stays and who goes Roundtable 5: Preventing long-term ramifications to fundraising misses
12:30 pm – 6:30 pm	**Grand Opening Reception on The Valencia Lawn** **1:15pm PEI Center Stage**: Hosted by **Bill O'Conor**, Managing Director- Americas, **PEI Group** **1:30pm – 2:00pm Fireside Chat** with **Scott Nuttall,** Co-Chief Executive Officer**, KKR** **Interviewer: Adam Le**, Senior Editor, EMEA, **Private Equity International & Secondaries Investor** **2pm – 2:30 pm: Keynote Presentation: Sea Change** Howard Marks will discuss the potential sea change occurring in the investment world and what this could mean for credit investors. **Howard Marks**, Co-Founder and Co-Chairman, **Oaktree Capital Management** **3pm – 3:30pm: Panel: The Watch – Identifying success benchmarks for the most innovative emerging managers of 2024** As market conditions make capital deployment more difficult, investors are keeping selective in their search for emerging managers who can diversify their strategy, deal size, and industry specialization. How do our founders recreate the investment playbook for collaborating uniquely and delivering on LP expectations

	Interviewer: Beatrice Mitchell, Co-Founder and Managing Director, **Sperry Mitchell & Company Inc.** **Panelists:** **Stephanie Geveda,** Founder and Managing Partner**, Coalesce Partners** **Luke Myers**, Co-Founder and Managing Partner, **Truelink Capital** **3:30pm – 4pm Cross Conversation – Accelerating Equity in Global Sports** **Interviewer: Lawrence Aragon,** Editor of **Venture Capital Journal** and West Coast Bureau Chief, **PEI Group** **Interviewee: Jasmine Robinson,** Co-Founder and Managing Partner**, Monarch Collective** **4pm – 4:30pm: Fireside Chat: Leading the pack – A legacy of strong performance and powerhouse investing** **Britt Harris**, Founder and Chief Executive Officer, On Eagles Wings **Interviewer: Gregg Gethard,** Reporter**, Buyouts** **4:30pm – 5pm: Fireside Chat** with **Dr. Indermit Gill**, Senior Vice President of Development Economics and Chief Economist of the **World Bank Group** **Interviewer: Richard Melville,** Editorial Director U.S**., PEI Group** **VIP Meet & Greet**: An opportunity to rub shoulders with the next generation of leaders in private equity, including PEI Group's **Top 40 under 40** and **Women of Influence**. **Networking Lounge**: A place to arrange your meetings via the networking app and meet the networking engagement team that can help you build your schedule of meetings and events as you plan your activities for the days ahead. *Free-flow food, and beverages will be provided starting at 1 pm*	
7:15 pm – 9:30 pm	**Investor advisory board dinner** (Invite only)	**Private networking dinners** (Private hosts, invite only)
	Take your evening meetings and network in the JW lobby bar and the drinks are on us! Just present your badge at the bar between 8pm and 10pm.	

Thursday, March 7	
Fringe Lounges (Open all day) *Spaces to connect, engage, and relax*	
The Board Room (LPs only) A space exclusively for institutional investors to connect with peers to	**The Editorial Suite** (Open to all) Join the conversation in PEI Group's editorial suite. Be a part of the interviews, podcasts, and videos broadcast live to the editorial sites.

discuss the most pressing pain points and impactful strategies for both professional and portfolio growth.	**Networking Lounge** (Open to all) Book a meeting space, connect, work, or charge your phone.

Plenary sessions	
7:45 am	**Registration and Breakfast**
8:20 am	**Chairperson's opening remarks - Richard Melville,** Editorial Director U.S**., PEI Group**
8:30 am	**Keynote Investor Panel: "In-the-know" investors: The five themes impacting allocations in 2024** Faced with inflation and higher interest rates, the post-pandemic surge in deal volumes and fundraising is under pressure. Despite a substantial inventory of dry powder, investors are additionally struggling with overallocation challenges, dislocation in asset prices, lower availability, and rising cost of debt. PEI Group's Research Director will dissect the present landscape, drawing on the findings of PEI Group's annual LP survey: Private Equity International LP Perspectives 2024 report, followed by a panel of investors who will add their insight to the findings. **Dan Gunner**, Research Director, **PEI Group** *Followed by an investor panel* **–** Moderator: **Jennifer Choi**, Chief Executive Officer, **ILPA** Panelists: **Lamar Taylor**, Interim Executive Director & Chief Investment Board, **Florida State Board of Administration** **Bei Saville**, Chief Investment Officer, **Advance Treasury and Fingerboard Family Office** **Geeta Kapadia**, Chief Investment Officer, **Fordham University** **Robert Burd**, Deputy Chief Investment Officer, **Maryland State Retirement and Pension System**
9:25 am	**Fireside chat** with **David Rubenstein,** Co-Founder & Co-Chairman**, The Carlyle Group** Interviewer: **Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets**
9:55 am	**Keynote GP Cross Conversation: Executive Insights into the U.S. economy and high growth strategies** **Moderator**: **Richard Melville,** Editorial Director U.S**., PEI Group** Leaders: **Eric Liu,** Partner, Head of North American Private Equity, and Co-Head of Global Healthcare, **EQT Partners** **Elizabeth Burton,** Managing Director and Senior Client Investment Strategist, Client Solutions Group, **Goldman Sachs Asset Management**
10:35 am	**Networking break & refreshments**
11:05 am	**Fireside chat: Turning Great Innovators into Great Businesses** with **Orlando Bravo** Co-Founder & Managing Partner**, Thoma Bravo**

	Thoma Bravo is the world's largest tech buyout firm - with more than $134 billion in AUM. Last year, the firm generated more than $13.5 billion in total realizations. Exits included the sale of Adenza to Nasdaq, Syntellis to Roper and Imperva to Thales. The firm's recent flagship acquisitions include Coupa, Ping/ForgeRock and Anaplan. In this Fireside Chat, firm co-founder Orlando Bravo and PE Hub editor-in-chief Mary Kathleen (MK) Flynn will discuss the current climate for tech deals and the role private equity plays in building tech companies. We'll also find out Thoma Bravo's take on cybersecurity, GenAI and other promising technologies. Interviewer**: Mary Kathleen (MK) Flynn,** Editor-in-Chief**, PE Hub & PE Hub Europe**
11:35 am	**Fireside chat: At the forefront of secondaries innovation** How do we get to $1 trillion in annual secondaries market deal volume? Senior editor Adam Le sits down with secondaries market veteran Yann Robard to discuss what needs to happen for higher turnover of secondhand private markets exposure and assets, as well as the great valuation conundrum. Interviewer: **Adam Le,** Senior Editor, EMEA, **PEI and Secondaries Investor** Interviewee: **Yann Robard**, Managing Partner**, Whitehorse Liquidity Partners**
12:05 pm	**Investor panel: The portfolio design work – Is PE delivering the highest level of return for the given risk?** As we develop a better understanding of how extensive the downturn will be for 2024, we will measure where PE compares within the diversification strategy and explore opportunities to generate strong portfolio returns, making a strong case for private equity or diverging away from the asset class. Learn best practices for developing resiliency, mitigating exposure to loss, and testing investment concepts that bridge asset returns and investment values. Moderator: **Bill Kelly,** Chief Executive Officer**, CAIA Association** Panelists: **Dana Johns**, Head of Private Equity, **The New Jersey Department of the Treasury's Division of Investment** **Lori Hall-Kimm**, Senior Managing Director, Head of Global Private Equity, **Healthcare of Ontario Pension Plan (HOOPP)** **Harj Shoan**, Senior Managing Director, Private Capital, **Ontario Teachers' Pension Plan (OTPP)**
12:50 pm	**Panel: Revolutionizing engagement with the market: Does AI deserve a seat on the investment board?** In a world that values speed to market and digital prowess, the emergence of generative AI systems, like ChatGPT, will create a paradigm shift that not only enhances our roles, but may intelligently spearhead our investment decisions. Considering the pervasiveness of this disruption, we will explore how best to assess AI's increasingly expansive significance, where it interfaces, how to take advantage of the rapidly changing landscape to generate liquidity, and the ramifications of adopting AI into investment decision-making processes. **Moderator: Tim Tracy**, Private Equity Leader, Americas, **Ernst & Young** **Panelists:** **Prasanna Ramaswamy**, Managing Director, Head of Technology & Data**, CPP Investments** **Adebisi Oje**, Sales Director, Data & AI – Capital Markets, **Microsoft** **Ercan Ucak**, Vice President, **Cerberus Capital Management** **David Enriquez**, Partner, **Clipway**

1:30 pm - 2:30 pm	**Networking lunch**
	The Big Themes in Private Markets **Chaired by**: **Graham Bippart**, Senior Editor, Capital Markets and Compliance, **Private Equity International**
2:40 pm	**Cross Conversation: Aligning partnerships with empowerment: The roadmap for building high quality talent networks and an inclusive business model** From recruitment to development, learn how these titans build the most successful talent pathways to drive strong company performance and create value. Deep dive into identifying and implementing operational interventions that help create opportunities for talent advancement and inclusive business environments. Moderator: **Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets** Leaders: **Tarrus Richardson,** Founder and CEO**, IMB Partners** **Marcus Felder**, Principal, Portfolio Operations, **Blackstone**
3:10 pm	**Investor Panel: The Big Picture - Constructing the Alternatives Portfolio** Hear from the nation's leading Heads of Alternatives as we dive into how allocations in private assets investing are being considered – we will additionally review relative value assessments, liquidity planning and portfolio monitoring. Moderator: **Raelan Lambert**, Senior Partner and Global Alternatives Leader, **Mercer** Panelists: **Venus Phillips**, Managing Director, **The Kresge Foundation** **Peter Keehn**, Senior Managing Director, Private and Alternative Assets, **Allstate Investments** **Robert Mellema**, Managing Director, **CPP Investments**
3:50 pm	**Networking break & refreshments**
4:10 pm	**Panel: The Negotiation Table -** What LPs need amid challenging market conditions to secure more transparency, unique fund structures and favorable terms. We address the timing and dynamics at play between LPs, SPs, GPs amidst market shifts. Moderator: **Gregg Gethard**, Reporter**, Buyouts** Panelists: **Samantha Davidson,** President & Head of Global Investing**, Cambridge Associates** **Eric Lang**, Senior Managing Director, Private Market, **Teachers Retirement System of Texas** **Ya Tung**, Chief Investment Officer, **The Jefferies Family Office**

4:50 pm	**Panel: Cueing up co-investments – Advantages and pitfalls** Determine the availability for co-investments as GPs raise bigger funds. Moderator: **Carmela Mendoza**, Senior Reporter, **Private Equity International** Panelists: **Chris Eckerman**, Senior Portfolio Manager, Head of Co-Investments, **State of Wisconsin Investment Board** **Allen Waldrop**, Director of Private Equity, **Alaska Permanent Fund Corporation** **Todd Abbrecht**, Co-Chief Executive Officer**, Thomas H. Lee Partners** **Anne Philpott,** Managing Director**,** Junior Capital & Private Equity Solutions**, Churchill Asset Management**		
	Secondaries Investor **Secondaries:** Chaired by**: Adam Le,** Senior Editor, EMEA, **Private Equity International & Secondaries Investor**	Buyouts **Emerging managers & sector specialists** Chaired by**: Chris Witkowsky**, Editor**, Buyouts**	PE Hub **Dealmaking in 2024** Chaired by**: Mary Kathleen (MK) Flynn,** Editor-in-Chief**, PE Hub & PE Hub Europe**
2:40 pm	**Fireside Chat** with **Evercore's Nigel Dawn** "The man behind the continuation fund boom" was how one headline described Evercore's global head of private capital advisory, Nigel Dawn, in 2020. Learn from Dawn the biggest issues in the secondaries market and what's in store for the future of GP-led and continuation fund transactions. Interviewer: **Adam Le**, Senior Editor, EMEA, **Private Equity International & Secondaries Investor** Interviewee: **Nigel Dawn,** Senior Managing Director, Head of Capital Advisory Group**, Evercore**	**Cross Conversation: Deal flow thaw out- Structuring co-investments with a diversification lens** As deal flow begins to pick back up, how do we make the co-investment pace work? Assess how best to review overallocations, find the solid GP led deals, remain selective and push the right assets as we aim to incorporate a thorough diversification process. We also consider, how GPs are parsing CVs with co-investment opportunities in the midst of this continuation fund rise. **Kyongdo Min,** Senior Portfolio Manager**, Maryland State Retirement and Pension System**	**Co-Investment Case Study: Explore the biggest opportunities in the Pharma sector** Learn about the current landscape for biopharma investing including current challenges and opportunities and hear how the complementary skill sets between a GP and LP have led to an accretive decades long partnership in a the highly specialized investment sector that is biotech. **Patrick Jordan,** Managing Partner and Chief Operating Officer**, NovaQuest Capital Management**

		David Fann, Vice Chairman, Senior Managing Director, **Apogem Capital**	**Dean Giovanniello, Senior Principal, Financial Institutions Consulting Services, IQVIA**
3:10 pm	**Keynote panel: The state of play for GP-led secondaries** Sponsor-initiated secondaries transactions have grown from a niche area of the market to roughly half of all secondaries trading activity. In 2024, the strategy faces headwinds from regulatory pressures, as well as tailwinds from wider liquidity and distribution issues in the private equity market. What's the outlook for these deals and where will future growth come from? Optionality for investors or an unnecessary conflict of interest? Moderator: **Adam Le**, Senior Editor, EMEA, **Private Equity International & Secondaries Investor** Panelists: **Paul Sanabria**, Senior Managing Director & Global Co-Head of Secondaries, **Manulife** **Steve Poliner**, Senior Investment Counsel, **Teacher Retirement System of Texas** **Tom Kapsimalis**, Managing Director, Secondaries, **CPP Investments** **Sebastiaan van den Berg,** Partner, Co-Head GP Equity Solutions**, Astorg**	**Panel Part 2: Building the business case – Success benchmarks for the most innovative emerging managers of 2024** As market conditions make capital deployment more difficult, investors are keeping selective in their search for emerging managers who can diversify their strategy, deal size, and industry specialization. How do our emerging managers recreate the investment playbook for collaborating uniquely and delivering on LP expectations. Moderator: **Steve Russo**, Executive Director, **Indiana Public Retirement System** Panelists: **Sherrese Clarke Soares**, Founder and Chief Executive Officer, **HarbourView Equity Partners** **Stephanie Geveda**, Founder and Managing Partner, **Coalesce Partners** **Elizabeth Weymouth**, Founder and Managing Partner, **Grafine Partners**	**Panel: Rethinking operating models to innovate, value create and fuel top line growth** PE firms have turned inward to focus on getting the most out of portfolio companies. Explore the optimal strategies for • Determining LP needs and improving transparency • Driving powerful operations and growing the portfolio organically (Add-ons considered) • Maximizing capital efficiencies via value creation Moderator: **Matthew Coyne**, Managing Director, Portfolio Advisory, **Aksia** Panelists**:** **Zorian Rotenberg,** Operating Partner – GTM & Revenue Growth, **Charlesbank Capital Partners** **Drew Scielzo**, Operating Partner, **Acon Investments** **Daniel Perry**, Director, Sales and Commercial Excellence, **Parthenon Capital**
3:50 pm	**Networking break & refreshments**		

4:10 pm	**Fireside Chat with David Enriquez, Partner, Clipway** How should LPs approach the secondaries market? Tips from NYCRS' former head of PE-come-AI-enhanced secondaries buyer. Interviewer: **Madeleine Farman,** Senior Reporter**, Private Equity International and Secondaries Investor**	**Panel: The entrepreneurial mindset – Building for strong performance and true partnership potential** The real value creation for LPs- our leaders establish what it takes to: formulate the right team, partner for unique terms and execute on emerging opportunities for sustainable outperformance. Moderator: **Robert Blaustein,** Partner, Investment Funds Practice Group**, Kirkland & Ellis LLP** Panelists: **Tyler Zachem**, Chief Executive Officer and Founder, **Broad Sky Partners** **Kendra Corbett,** Partner**, Cloverlay** **Alok Singh,** Co-Founder, Chief Executive Officer and Chief Investment Officer, **Bridge Growth Partners** **Andy Unanue**, Founder and Managing Partner, **AUA Private Equity Partners**	**Keynote panel: The key to succeed – Upgrading the sourcing model** Top producing firms will contextualize their sourcing process and how it has evolved since Covid and their battle plan for securing new deals in this competitive landscape, including the use of generative AI. Moderator: **Mary Kathleen (MK) Flynn,** Editor-in-Chief**, PE Hub & PE Hub Europe** Panelists: **Agha Khan**, Managing Director and Co-head of Private Equity, **Stone Point Capital** **Kim Hourihan,** Chief Investment Officer, **CBRE Investment Management** **Anna Barath,** Chief Investment Officer**, Bite Investments**

4:50 pm	**Panel: Are continuation funds on the path to continual growth?** What does the growth of continuation vehicles mean for investors, and how will they back them in the long term? What steps can LPs take to help decide whether to roll or sell when faced with continuation funds? Moderator: **Mark Boyagi,** Partner, Investment Funds Group**, Kirkland & Ellis LLP**	**Panel: The competitive advantage - Broadening diversification for best in class emerging manager programs** Learn successful, yet unconventional strategies to forming a diverse manager program that can identify and access firms with the most attractive investment returns of their generation. Further, understand what it takes to create a lucrative open-door policy for partnerships that have exceptional potential. Moderator:	**Panel: The dealmaking sweet spot – Life in the lower middle market** Deep dive into where to find the most compelling returns and flexibility in exit plans, sale drivers, and sectors ripe for dealmaking. Moderator: **Mary Kathleen (MK) Flynn,** Editor-in-Chief**, PE Hub & PE Hub Europe** Panelists:

	Panelists: **Tori Buffery**, Partner, **Morningside Capital** **Tjarko Hektor,** Partner**, New 2ND Capital** **Ben Perl,** Managing Director and Global Co-Head of Secondary Private Equity**, Neuberger Berman** **David Herbers**, Managing Director, Secondaries Group, **Ares Management**	**Carl Williams**, Partner and Co-Founder**, Sandbrook Capital** Panelists: **Anna Dayn**, Managing Partner and US Head, **New End** **Neal Graziano**, Managing Director, Private Assets, **W.K. Kellogg Foundation** **Michelle Jacobi,** Managing Director**, Gatewood Capital Partners LLC**	**Kate Faust**, Partner, **Rockwood Equity Partners** **Suzanne Yoon,** Founder and Chief Executive Officer**, Kinzie Capital Partners** **Andi Klein,** Managing Partner, Head of Triton Smaller Mid-Cap**, Triton Partners** **Pamela Hendrickson,** Vice Chairman**, The Riverside Company**
5:30 pm – 6:10 pm 6:10 pm - 7 pm	**Keynote fireside chat** with **Guest of Honor: Jonathan Gray,** President and Chief Operating Officer**, Blackstone** **Interviewer: Richard Melville,** Editorial Director U.S**., PEI Group** Networking Reception		
7:15 pm	**The Secondaries Investor 10-year anniversary dinner**		

Friday, March 8	
8 am	**Registration and Breakfast**
8 am	**International Women's Day Breakfast** *hosted by* **Emily Mendell,** Executive Director**, PEWIN**
8:30 am	**LP-only breakfast hosted by ILPA** Join ILPA over breakfast for an update on current initiatives, followed by a roundtable discussion focusing on the latest trends facing global LPs. Share your experiences and hear from the community.
8:30 am	**Breakfast Briefing: The Wealth Channel – The $80trn opportunity:** As democratization of private markets expands investor types drastically, rethink how traditional forms of alignment and the rules for of engagement may change for certain product types. This is a discussion that addresses the broader opportunities for alternatives, RIA's, Family Offices, including packaging and distribution options. Moderator: **Carmela Mendoza**, Senior Reporter, **Private Equity International** **David Fann**, Vice Chairman, Senior Managing Director, **Apogem Capital** **Anna Barath,** Chief Investment Officer**, Bite Investments**

Fringe Lounges (Open all day)
Spaces to connect, engage, and relax

The Board Room (LPs only) A space exclusively for institutional investors to connect with peers to discuss the most pressing pain points and impactful strategies for both professional and portfolio growth.	**The Editorial Suite** (Open to all) Join the conversation in PEI Group's editorial suite. Be a part of the interviews, podcasts, and videos broadcast live to the editorial sites. **Networking Lounge** (Open to all) Book a meeting space, connect, work, or charge your phone.

9:25 am	**Chairperson's opening remarks - Bill O'Conor**, Managing Director- Americas, **PEI Group**
9:30 am	**Keynote Cross Conversation** with **Steven Meier**, Chief Investment Officer and Deputy Comptroller for Asset Management, **New York City Retirement Systems and Chip Kaye,** Chief Executive Officer**, Warburg Pincus**
	Private Equity International **Global markets**
10:05 am	**Delivering true alpha across the globe** Can institutions still expand far beyond their borders, or is the era of globalization over – and what does that mean for investment strategies? Moderator: **Carmela Mendoza**, Senior Reporter, **Private Equity International** **Tadasu Matsuo,** Managing Director, Head of Global Alternative Investments**, Japan Science & Technology Agency** **Claire Ngo**, Managing Director, **Temasek** **Sophia Tsia**, Managing Director, **Trinity Church Wall Street**
10:50 am	**Fireside Chat: Next steps for an inspiring legacy – Ailman's view on the energy transition and emerging powerhouses overseas** The famed Christopher Ailman, a celebrated leader who has empowered, innovated and served laudably as an industry titan, will provide a more nuanced look at where the energy sector is heading, as well as provide insights into the greatest emerging market opportunities internationally as interest in China wanes. Interviewer: **Carmela Mendoza**, Senior Reporter, **Private Equity International** Interviewee: **Christopher Ailman**, Chief Investment Officer, **California State Teachers' Retirement System (CalSTRS)**
11:30 am	**Networking break & refreshments**

11:50 am	**Keynote: Fireside Chat** with **David Mussafer**, Chairman and Managing Partner, **Advent International, L.P.** Interviewer: **Madeleine Farman**, Senior Reporter, **Private Equity International and Secondaries Investor**		
12:25 pm	**Fireside Chat: The 2025 economic outlook – A geopolitical focus to planning both investments and divestments** The next phase for alternatives asset markets: a transversal perspective on the most appealing opportunities across asset classes in a changing landscape. Gain real-time insights into what the economic recovery might look like and where the opportunities exist to sustainably diversify your portfolio/pursue exits and liquidity events. Interviewer: **Richard Melville,** Editorial Director U.S**., PEI Group** Interviewee: **Isabelle Scemama,** Global Head, **AXA IM Alts**		
	New Private Markets **ESG & Impact Investing** Chaired by**: Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets**	Venture Capital Journal **Venture Capital** Chaired by: **Lawrence Aragon,** Editor of **Venture Capital Journal** and West Coast Bureau Chief, **PEI Group**	Private Debt Investor **Private credit** Chaired by**: Robin Blumenthal,** Americas Editor, **Private Debt Investor**
10:05 am	**Founders Panel: Private Equity's role in the energy transition** Asset owners are under pressure to position their portfolios for the energy transition and capture upside from arguably the largest economic shift since the industrial revolution. But while the scale of the investment opportunity is vast, the level of uncertainty, as well as technological, political and regulatory risk, is daunting. We speak with founders of established leading private markets firms, whose strategies are driving change in global energy markets, to find out where they believe most attractive risk-adjusted returns can be earned. Moderator: **Toby Mitchenall,**	**Panel: The improved VC playbook – Expanding the pillars of innovation** Take a more integrative approach to expanding your VC program and executing on the new standards that support innovation. Understand what it takes to re-evaluate the portfolio in this environment. Moderator: **Lawrence Aragon,** Editor of **Venture Capital Journal** and West Coast Bureau Chief, **PEI Group** Panelists: **Max Miller**, Managing Director, Growth Equity, **CPPIB**	**Panel: Key trends shaping the future of private debt** Private debt appears better positioned and compared with other asset classes, with robust fundraising and strong returns, despite a challenging climate. Further explore the private debt landscape that is shaping our investment decisions. Moderator: **Robin Blumenthal,** Americas Editor, **Private Debt Investor** Panelists: **Chris Semple,** Partner, US Credit, **Crestline** **Michael Bologna**, Chief Investment Officer, **NovaQuest Capital Management**

	Senior Editor, ESG & Sustainability, **New Private Markets** Panelists: **Joost Bergsma**, Chief Executive Officer and Managing Partner, **Glennmont Partners from Nuveen** **Hans Kobler**, Founder and Managing Partner, **Energy Impact Partners** **Pierre-Ettienne Franc**, Chief Executive Officer, **Hy24** **Doug Kimmelman,** Founder and Senior Partner**, ECP**	**Rudina Seseri**, Founder and Managing Partner, **Glasswing Ventures** **Mary D'Onofrio**, Partner, **Bessemer Venture Partners**	**Grady Frank**, Partner and Head of Private Credit Origination, **GoldenTree Asset Management**
10:50 am	**Panel: The Changemakers – Empowering innovation and the mission behind employee shared ownership programs** Increased fund performance via shared prosperity? These powerful changemakers provide their perspectives on how to successfully implement ESOPS. **Leaders:** **Daniel Goldstein**, Chief Executive Officer, **Go ESOP LLC** **Regina Carls,** Managing Director, ESOP Advisory Group Head, **J.P. Morgan** **Mark Buchanan,** Managing Director, Head of ESOP Investment Banking, **Stout**	**Dual perspective case study: Accelerate growth at all costs** With new debt and capital becoming scarce amidst a declining valuation environment, discover if now is the time for growth equity to shine and compare performance across strategies. **Amol Helekar,** General Partner**, TCV** **Allen Waldrop**, Director of Private Equity, **Alaska Permanent Fund Corporation**	**Panel: End of Easy Money -Executing the Vision via Flexible Capital Solutions** With difficulty in accessing traditional forms of capital, assess how LPs and GPs need to evolve in today's economy and which flexible capital solutions are emerging as strong alternative for companies with customized needs. Moderator: **Robin Blumenthal,** Americas Editor, **Private Debt Investor** Panelists: **David Miller,** Global Head of Private Credit & Equity**, Morgan Stanley** **John Stott**, Partner, **Arctos Partners** **Bryan High,** Head of Capital Solutions**, Barings**
11:30 am	**Networking break & refreshments**		

11:50 am	**Cross Conversation - ESG Experts: Organizing the defense – The future of sustainable investing and fiduciary duty** Is the ESG backlash significantly changing how we invest, or is it just political histrionics? What is driving sustainable capitalism? We speak to ESG leaders about how their organisations view anti-ESG rhetoric and whether they are adapting the way they execute their ESG programmes or how they communicate them. Further, what should GPs say – and more importantly what should they not say – to make sure they are on the same page as the LP across the table. Moderator: **Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets** Leaders: **Ken Pontarelli**, Global Head of Sustainable Investing, **Goldman Sachs Asset Management** **Anna Totdahl**, Investment Officer, ESG & Sustainability, **Oregon State Treasury**	**Keynote Cross Conversation: Growing the mission – A powerful VC partnership for impact investing and returns** As a seasoned VC, advisor, attorney and accomplished leader, Lorine Pendleton deep dives into MoCaFi's infrastructure is a turnkey fintech platform for government and philanthropic organizations to provide individuals and families with cash assistance, mobile banking, and financial programming that create pathways to wealth led by the brilliant executive Wole Coaxum. Learn the green flags for fast growth potential and strong impact investing, as Lorine explains the "why's and how's" behind her Portfolia Rising America Fund's success, as they invest in this great company. **Lorine Pendleton,** Founder & Managing Partner, **125 Ventures** **Wole Coaxum**, Founder and Chief Executive Officer, **MoCaFi (Mobility Capital Finance)**	**Fireside Chat** *with* **Daniel Pietrzak,** Partner, Global Head of Private Credit, **KKR** Interviewer: **Robin Blumenthal,** Americas Editor, **Private Debt Investor**

12:25 pm-	**The Future of Impact Investing** Impact investing has come a long way in a short space of time, with substantial private markets funds being deployed and starting to generate returns for LPs. What do limited partners look for in a leading edge impact fund, where do they fit into a portfolio and what is best practice when it comes to managing impact alongside financial returns? Moderator: **Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets** Panelists: **Andrew Siwo**, Head of Sustainable Investments and Climate Solutions, **New York State Common Retirement Fund** **Reuben Munger**, Managing Partner and Chief Investment Officer, **Vision Ridge** **Jan Stahlberg**, Founder & Managing Partner, **Trill Impact**	**Panel: Adaptation, Defense…Assessing the 2024 climate lexicon and VC appetite** Coming off of a year of highs and lows for climate ventures, we assess the growth ecosystem and the market/geopolitical conditions that will enable or inhibit the most anticipated climate tech. Moderator: : **Lawrence Aragon,** Editor of **Venture Capital Journal** and West Coast Bureau Chief, **PEI Group** Panelists: **Lydia Guett,** Head of Growth**, Systemiq Capital** **Zach Barasz,** Partner**, G2 Venture Partners** **Dr. Lucas Joppa,** Chief Sustainability Officer and Senior Managing Director**, Haveli Investments** **Veronica Li**, Head of North America, **Primavera Capital Group**	**Cross Conversation: NAV loans on the rise** With capital becoming scarcer and costs of debt increasing, assess how GPs are adapting through NAV loans to deliver liquidity back to LPs or reinvest back into a portfolio. Moderator: **Graham Bippart**, Senior Editor, Capital Markets and Compliance, **Private Equity International** Leaders: **Milwood Hobbs, Jr.,** Managing Director and Head of Sourcing & Origination**, Oaktree Capital** **Felix Zhang**, Partner, Alternative Credit, **Ares Management**
1:10 pm – 3 pm	**Lunch Roundtables** 1. Future-proofing your asset allocations for best-in-class portfolio construction 2. Negotiating for transparency and value creation 3. Going beyond leveraged buyouts to create a thriving business 4. DE&I benchmarks for high-yield investment teams and partners 5. LP Checks and balances: Creating cohesion with advisory committee & the board 6. Addressing challenges to the legacy: New-gen plans for SRI and ESG 7. NAV Financing vs. Continuation Funds – Pros and Cons 8. Forward Thinking: Assessing the current regulatory environment to determine future implications 9. Succession planning: Investing in leadership continuity 10. Top-rated benchmarks for identifying promising emerging managers 11. Structuring co-investments for greater transparency, control, and higher return potential 12. The key return differentiator – Enhancing portfolio performance during the holding period		
3pm	**Content Concludes**		

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