

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.



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)**



Jonathan Gray
President and
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David Rubenstein
Co-Founder & Co-Chairman
The Carlyle Group



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*

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)*

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

Jim Momtazee, *Managing Partner, Patient Square Capital*

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

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

Bill Kelly, *Chief Executive Officer, CAIA*

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



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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)**

Jacob Comer, *Partner*, **NovaQuest Capital Partners**

Daniel Goldstein, *President and Chief Executive Officer*, **Folience**

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 & 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**

Michael Chang, *Partner, Private Equity*, **BC Partners**

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

Anna Barath, *Head of Fund Investments*, **Bite Investments**

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

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

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

Joost Bergsma, *Founder and Chief Executive Officer*, **Glennmont Capital**

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

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

Mark Steed, *Chief Investment Officer*, **Arizona Public Safety Personnel Retirement System (PSPRS)**

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

Pierre-Etienne 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**

Sara Zulkosky, *Co-founder and Managing Partner*, **Recast Capital**

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

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

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

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

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

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

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

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

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



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Agenda

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

| Wednesday, March 6 | |
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| 9 am – 12 pm | Council Meetings (Invite only) |
| 9 am – 12 pm | <p>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 reanalyzing portfolio construction/due diligence approaches to partnerships.</p> <p>9 am - 10 am Workshop: Leading with leverage – The power playbook to gaining the most optimal fund terms Please join the world’s leading negotiator, Chris Voss, on developing the allocators’ newfound power within partnerships that can be built on value creation. 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. Facilitator: Chris Voss, Founder, Chief Executive Officer, The Black Swan Group</p> <p>10:10 am - 10:55 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.</p> <p>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) Vince “Robert” Smith, Chief Investment Officer, New Mexico Investment Council Scott Anderson, Chief Investment Officer, North Dakota Retirement and Investment Office</p> <p>11:05 am – 12 pm Think tank: The strategic secrets that guide successful portfolio decision-making Roundtable 1: Determining quantifiable key performance metrics for re-upping decisions, commitment size and shifting capital</p> |

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| | <p>Roundtable 2: Analyzing the denominator effect and its impact on risk returns and liquidity options</p> <p>Roundtable 3: Investors' reengagement on DPI and ensuring money back from the PE portfolio: successful exit strategies</p> <p>Roundtable 4: Navigating the increased competition for deals in niche sectors</p> <p>Roundtable 5: Culling the portfolio: Determining who stays and who goes</p> <p>Roundtable 6: The new market landscape and evolving DD processes</p> <p>Roundtable 7: Preventing long-term ramifications to fundraising misses</p> |
| 9 am – 12 pm | <p>The Managing Partner and Founders Council: The Managing Partner and Founders Council will gather an intimate group of leading managers, founders and industry experts for their outlook on private equity in 2024.</p> <p>9 am – 9:30 am The State of the Market Address</p> <p>9:30 am – 10am Fireside Chat: The Wealth Channel – The \$80trn opportunity: As retailization 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.</p> <p>10:10 am – 10:55 am Keynote 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.</p> <p>11:05 am – 12 pm Think tank: The Year of Capital Planning - Comparing LP & GP Expectations Looking at the 2024 landscape, reassess existing and new capital commitments during slower exit environments.</p> |
| 12 pm – 1:30 pm | <p>Women in Private Equity Lunch An opportunity to network with and learn from the women at the top of private equity. This is an invaluable lunch to establish relationships and build your network before the main event.</p> |
| 12 pm – 1:30 pm | <p>Lunch in the Citrus Garden</p> |
| 1:30 pm – 7 pm | <p>Grand Opening Gala Reception on The Valencia Lawn</p> <p>PEI Center Stage: Hosted by the PEI Group editorial team and guest speakers:</p> <p>2pm – 2:30pm: Fireside Chat with Howard Marks, Co-Founder and Co-Chairman, Oaktree Capital Management</p> <p>3pm – 3:30pm: Cross Conversation - Innovative views behind employee shared ownership programs Increased fund performance via shared prosperity? Evaluate dual perspectives on how to successfully implement ESOPS.</p> |



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| | <p>Daniel Goldstein, President and Chief Executive Officer, Folience</p> <p>4pm – 4:30pm: Panel: A New Frontier in the Major Leagues – Sports investing on peak</p> <p>5pm - 5:30pm: Emerging Managers 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 emerging managers recreate the investment playbook for collaborating uniquely and delivering on LP board expectations. Stephanie Geveda, Founder and Managing Partner, Coalesce Partners Sherrese Clarke Soares, Founder and Chief Executive Officer, HarbourView Equity Partners</p> <p>6pm – 6:45pm Fireside Chat with Britt Harris, Acting Chief Investment Officer and Chief Operating Officer, Texas Permanent School Fund Corporation</p> <p>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.</p> <p>Networking Lounge & Station: 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.</p> <p><i>Also available – charging stations, free-flow food, and beverages will be provided starting at 3 pm.</i></p> | |
| 8 pm – 10 pm | Investor advisory board dinner (Invite only) | Private networking dinners (Private hosts, invite only) |
| | Have no plans but still want to network? PEI Group will host you for a relaxed evening bite and drink overlooking the lakes. | |

| Thursday, March 7 | |
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| 7:30 am | Early registration & networking <i>Meeting rooms open</i> |
| 7:30 am | Investor breakfast & workshop: The LPA negotiation – Changing the terms and conditions: Understand the impact in tougher markets |
| Fringe Lounges (Open all day) <i>Spaces to connect, engage, and relax</i> | |




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| 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. Join think tanks organized throughout the day around institution types, investment strategies, and sectors. | The Editors' Lounge (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. |
| Sector Specialists and Emerging Markets (open to all) Hosting Q&A's and productive pod discussions to connect both GPs and LPs to the leading experts in emerging markets and industry sectors. | Networking Lounge (Open to all) Book a meeting space, connect, work, or charge your phone. |

| Plenary sessions | |
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| 8:20 am | Chairperson's opening remarks |
| 8:30 am | Making the mark: Headlines of 2023 that will shape the 2024 LP-GP Nexus Hear from the editors on the front lines as PEI Group's team of award-winning private markets journalists and researchers take to the stage, bringing to life the stories that defined private equity in 2023 and giving the exclusive on the issues that will dominate headlines in 2024. |
| 9:00 am | Keynote panel: "In-the-know" investors: The seven 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 <i>Followed by an investor panel –</i> Jennifer Choi , Chief Executive Officer, ILPA Andrew Palmer , Chief Investment Officer, Maryland State Retirement and Pension System |
| 9:45 am | Fireside chat: Navigating inflation pressures and high interest rates David Rubenstein , Co-Founder & Co-Chairman, The Carlyle Group |
| 10:15 am | Structured networking & refreshments |
| 10:45 am | Keynote Panel: Executive Insights into the U.S. economy, high growth strategies and transparent partnerships |
| 11:25 am | Investor panel: The portfolio design work – Is PE delivering the highest level of return for the given risk? |






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| | <p>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.</p> <p>Moderator: Bill Kelly, Chief Executive Officer, CAIA</p> <p>Panelists: Lori Hall-Kimm, Senior Managing Director, Head of Global Private Equity, Healthcare of Ontario Pension Plan (HOOPP) Mark Steed, Chief Investment Officer, Arizona Public Safety Personnel Retirement System (PSPRS)</p> |
| 12:05 pm | <p>Fireside chat: At the forefront of secondaries innovation Yann Robard, Managing Partner, Whitehorse Liquidity Partners</p> |
| 12:35 pm | <p>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, and the ramifications of adopting AI into investment decision-making processes.</p> <p>Prasanna Ramaswamy, Managing Director, Head of Technology & Data, CPP Investments</p> |
| 1:15 pm - 2:20 pm | Networking lunch |
| 2:30 pm |  <p>The Big Themes in Private Markets Chaired by: Graham Bippart, Editor, Private Funds CFO & Private Equity International</p> |
| 2:30pm | <p>Panel: Coaching up and expanding the tenets for actionable DEI – Aligning expectations with empowerment</p> <p>Marcus Felder, Principal, Portfolio Operations, Blackstone</p> |
| 3:10 pm | <p>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.</p> <p>Raelan Lambert, Senior Partner and Global Alternatives Leader, Mercer Venus Phillips, Managing Director, The Kresge Foundation</p> |



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| 4:10 pm | Fireside chat: What does “transparency and value creation” mean to LPs and how can GPs deliver it innovatively? | | |
| 4:50 pm | <p>Panel: Cueing up co-investments – Advantages and pitfalls Determine the availability for co-investments as GPs raise bigger funds.</p> <p>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</p> | | |
| |  <p>Secondaries</p> <p>Chaired by: Adam Le, Senior Editor, EMEA, Private Equity International & Secondaries Investor</p> |  <p>Emerging managers & sector specialists</p> <p>Chaired by: Chris Witkowski, Editor, Buyouts</p> |  <p>Dealmaking in 2024</p> <p>Chaired by: Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub & PE Hub Europe</p> |
| 2:30 pm | <p>Keynote panel: The state of play for GP-led secondaries</p> <p>Optionality for investors or an unnecessary conflict of interest?</p> <p>Paul Sanabria, Senior Managing Director & Global Co-Head of Secondaries, Manulife</p> | <p>Panel Part 2: The Watch – Identifying success benchmarks for the most innovative emerging managers of 2024</p> <p>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 board expectations.</p> <p>Sherrese Clarke Soares, Founder and Chief Executive Officer, HarbourView Equity Partners</p> <p>Stephanie Geveda, Founder and Managing Partner, Coalesce Partners</p> | <p>Interactive panel: The dealmaking sweet spot – Life in the lower middle market</p> <p>Deep dive into where to find the most compelling returns and flexibility in exit plans, sale drivers, and sectors ripe for dealmaking.</p> <p>Beatrice Mitchell, Co-Founder & Managing Director, Sperry, Mitchell & Company Inc.</p> |



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| | | Elizabeth Weymouth , Managing Partner, Grafine Partners | |
| 3pm | Transition between tracks | | |
| 3:10 pm | Case study: The risk-return spectrum – Benchmarking secondaries in a more impactful way Learn how the maturation of the market will engender a more nuanced way to benchmark risks/rewards for institutional investors. | Keynote fireside chat: Explore the biggest opportunities in the healthcare sector <i>with</i> Jim Momtazee , Managing Partner, Patient Square Capital | 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. Panelists: Agha Khan , Managing Director and Co-head of Private Equity, Stone Point Capital Kim Hourihan , Chief Investment Officer, CBRE Investment Management |
| 3:40 pm | Networking & refreshments | | |
| 4:10 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? Panelists: Tori Buffery , Partner, Morningside Capital | Panel: The competitive advantage - Broadening diversification for best in class emerging manager programs Learn successful, yet unconventional strategies to forming a proactive origination 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 in small to mid-size growth and buyout funds. | 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 <ul style="list-style-type: none"> • Determining LP needs • Driving powerful operations and growing the portfolio organically (Add-ons considered) • Maximizing capital efficiencies via technology value creation |



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| 4:40 pm | Transition between tracks | | |
| 4:50 pm | Interactive roundtables Roundtable 1: Enhancing returns via co-investments in the secondaries space Roundtable 2: LP-led secondaries Roundtable 3: Investor views on continuation funds and GP-led deals | Fund Formation and performance deep dive panel: Fund formation and real value creation for LPs- Establishing the unique terms for delivering on outperformance in operating partners and sector specialists. Jacob Comer, Partner, NovaQuest Capital Partners | Co-Investment Case Study: BC Partners Takes the Long-Term View on PetSmart With many exit routes blocked – most notably the IPO path – private equity firms are turning to other PE firms for help growing big businesses. BC Partners discusses their co-investment with Apollo Global Management to take a minority stake in PetSmart, a business BC bought in a take-private deal back in 2015. Michael Chang, Partner, Private Equity, BC Partners |
| 5:30 pm – 7:30 pm | Evening cocktails and The Secondaries Investor 10-year anniversary dinner: Da Vinci Lawn at Ritz Carlton Guest of Honor and Keynote: Jonathan Gray, President and Chief Operating Officer, Blackstone | | |

| Friday, March 8 | |
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| 7:45 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 am | Meeting rooms open |
| 8 am | Investor/GP breakfast & workshop: The key return differentiator – Enhancing portfolio performance during the holding period |
| 8 am | Nature walk/wellness breakfast in the spa |



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| Fringe Lounges (Open all day) Spaces to connect, engage, and relax | | | | |
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| Sector Specialists and Emerging Markets (open to all) Hosting Q&A’s and productive pod discussions to connect both GPs and LPs to the leading experts in emerging markets and industry sectors. | | Networking Lounge (Open to all) Book a meeting space, connect, work, or charge your phone. | | |
| 8:50 am | Chairperson’s opening remarks | | | |
| 9 am | Keynote fireside chat with Steven Meier , Chief Investment Officer and Deputy Comptroller for Asset Management, New York City Employee Retirement System | | | |
| 9:30 am | Regulatory keynote: Navigating the regulatory environment ahead In discussing their new proposals and policy implications, the SEC will break down what practical impacts the Private Fund Advisor will have on LPs and GPs. We aim to support a constructive re-evaluation of LP/GP sources of disconnect and aid both partners in collaborative efforts to address conflicts of interest. | | | |
| |  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 , West Coast Bureau Chief & Editor, Venture Capital Journal |  Private Equity International Global markets Chaired by: Craig McGlashan , Editor, PE Hub Europe |  Private Debt Investor Private credit Chaired by: Andy Thomson , Senior Editor, Private Debt Investor |
| 10:10 am | Founders Panel: Organizing the defense – The future of | Panel: The improved VC playbook – Expanding the pillars of innovation | Panel: Delivering true alpha across the globe Can institutions still expand far beyond their borders, or is the | Panel: Key trends shaping the future of private debt Private debt appears better positioned and compared with |



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| | <p>sustainable investing and its impact on the fiduciary duty</p> <p>Is the ESG backlash significantly changing how we invest, or is it just political histrionics? What is driving sustainable capitalism?</p> <p>Panelists:</p> <p>Joost Bergsma, Founder and Chief Executive Officer, Glennmont Capital</p> <p>Hans Kobler, Founder and Managing Partner, Energy Impact Partners</p> <p>Pierre-Etienne Franc, Chief Executive Officer, Hy24</p> | <p>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.</p> <p>Panelists:</p> <p>Sara Zulkosky, Co-founder and Managing Partner, Recast Capital</p> <p>Max Miller, Managing Director, Growth Equity, CPPIB</p> <p>Rudina Seseri, Founder and Managing Partner, Glasswing Ventures</p> | <p>era of globalization over – and what does that mean for investment strategies?</p> <p>Anna Barath, <i>Head of Fund Investments</i>, Bite Investments</p> | <p>other asset classes, with robust fundraising and strong returns, despite a challenging climate. Further explore the tech frontier and the growth of data analytics/technology models for quality of credit scoring, financial disclosures, liquidity management analytics.</p> |
| 10:40 am | Transition between tracks | | | |
| 10:50 am | <p>Keynote fireside chat: World renown leadership in transition investing</p> <p>The investor guide to combining positive social and environmental outcomes with strong risk adjusted returns.</p> | <p>Keynote Panel: Right time, right price – a strong VC appetite for landmark year 2024</p> <p>Considering investors are already in early stage investing and with no signs of abating, determine the best approaches to the vintage years.</p> <p>Mary D'Onofrio, <i>Partner</i>, Bessemer Venture Partners</p> | <p>Panel: The potential for a favorable outlook in the UK & Europe</p> <p>Understand the pressing factors that will push European investor sentiments about international market risks and further analyze the impact of higher interest rates, U.S. profit margin reversion, and regulatory updates in Europe.</p> | <p>Keynote debate: Void or vintage years – Weighing risk considerations against booming opportunities for private credit</p> <p>Are we optimistic about private credit's potential for promising yields, or is the fundraising slowdown tempering the present excitement? Moreover, to what extent are investors being exposed to risks due to under-regulation and lack of transparency.</p> |
| 11:20 am | Transition between tracks | | | |



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| 11:30 am | <p>Navigating growing expectations – The investors’ framework for future impact investing via PE</p> <p>Beyond “how we are investing or divesting,” we take a productive approach to what investors should ask GPs and vice versa to ensure promising avenues for doing well and doing good.</p> <p>Reuben Munger, Managing Partner and Chief Investment Officer, Vision Ridge</p> <p>Jan Stahlberg, Founder & Managing Partner, Trill Impact</p> | <p>Keynote fireside chat</p> <p>Keynote: Christopher Ailman, Chief Investment Officer, California State Teachers’ Retirement System (CalSTRS)</p> | <p>Case Study: Interactive case study: The 2025 economic outlook – A geopolitical focus to planning both investments and divestments</p> <p>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.</p> | <p>Working groups: Dissecting the private credit landscape</p> <p>Deep dive into emerging investment strategies across the direct lending capital structure. Assess the “opportunity to risk” ratio for the following strategies: Roundtable 1: CLOs Roundtable 2: Asset-backed loans Roundtable 3: Venture debts Roundtable 4: Private debt secondaries</p> |
| 12 pm | Transition between tracks | | | |
| 12:10 pm | <p>LP sustainability bugbears – Balancing ROI with ESG benchmarks</p> <p>Whether it be a societal or an environmental focus, knowing your commitment to ESG practices will aid in integrating measurable strategies in a fund’s own process. As a result, investors will increasingly rely on GPs to contribute with transparency and effectiveness in generating financial returns. How are we deciding on metrics for standardization and scrutinizing benchmarks? What regulation is being enforced to avoid greenwashing?</p> | <p>Dual perspective case study: Accelerate growth at all costs</p> <p>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.</p> <p>Amol Helekar, General Partner, TCV</p> <p>Allen Waldrop, Director of Private Equity, Alaska Permanent Fund Corporation</p> | <p>Panel: Emerging powerhouses as interest in China wanes – India and Africa</p> <p>Explore a more nuanced look at each of the greatest emerging market opportunities.</p> | <p>Case study: NAV loans on the rise</p> <p>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.</p> |



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| | Jacob Comer, <i>Partner</i> , NovaQuest Capital Partners | | | |
| 12:40 pm | Refreshments and depart for activities | Interactive brainstorm (Inclusive of lunch) | | |
| 1 pm – 5 pm | PEI Group Charity Cup Golf Tournament Post-round golf, cocktails, and awards ‘Garden to Table’ cooking experience Wellness Retreat Pickleball Tournament | <ol style="list-style-type: none"> 1. Empowering team retention & creative investment assessments 2. Future-proofing your asset allocations for best-in-class portfolio construction 3. Negotiating for Transparency and Value Creation 4. Going beyond leveraged buyouts to create a thriving business 5. DE&I benchmarks for high-yield investment teams and partners 6. Checks and balances: Creating cohesion with advisory committee & board stakeholders 7. Addressing challenges to the legacy: New-gen plans for SRI and ESG 8. Succession planning: Investing in leadership continuity 9. Top-rated benchmarks for identifying promising emerging managers 10. Structuring co-investments for greater transparency, control, and higher return potential | | |



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