

# Women in Private Markets Summit: North America 2024 Agenda

Day one: May 15

08:00

**Registration and coffee** 

08:45

**PEI Welcome** 

08:50

Chairperson's welcome
Laurie Mahon, Senior Advisor, Infrastructure Markets

09:00

Keynote: Managing private markets in a fluid environment

Andrea Auerbach, Partner and Head of Global Private Investments, Cambridge Associates

09:30

# Allocations and strategic choices for investors in private markets

- Dealing with the denominator effect: to what extent are many investors still over-allocated to private markets?
- The evolution of LPA terms: investor perspectives
- Investor views on GP strategies including continuation funds, margin loans & NAV financing
- Predictions for their allocations in the next decade: which strategies will see more allocations?

Moderator: **Keirsten Lawton**, Co-Head of US Private Equity Research, **Cambridge Associates Jennie Benza**, Investment Manager, Private Markets, **General Electric Pension** 

Leslie Vargas, Head of Portfolio Management, Resolution Life US

**Petya Nikolova**, Deputy CIO and Head of Infrastructure Investments, **New York City Comptroller's Office** 

Anne Duggan, Managing Director, Partners Capital

10:10

# How are the leading funds in private markets tackling their DEI deficit?

- Example of strategies employed by funds to address internal DEI deficits.
- Analyzing initiatives aimed at promoting DEI within the fund structure and culture



- Assessing the integration of DEI principles across the funds' investment portfolios and decisionmaking processes.
- Exploring the impact of DEI-focused actions on fund performance

Moderator: Marta Castelli, Methodologies Sector Lead, Corporates & Infrastructure, S&P Global Ratings

Kara Helander, Partner and Chief Diversity, Equity, and Inclusion Officer, Carlyle
Tracy Stuart, CFA, Managing Partner and Chief Executive Officer, Corbin Capital Partners
Tynesia Boyea-Robinson, President, and CEO, CapEQ
Kenna Baudin, Global Head of Private Capital, Egon Zehnder

10:50

**Coffee & Networking** 

11:20

# The continued rise of secondaries in private markets

- How is the surge in inflation and higher interest rates affecting secondaries markets?
- To what degree is the decline in M&A activity influencing market dynamics?
- Beyond PE: an exploration of the increase in secondaries in wider private markets
- How will the market evolve and grow in the next decade?

Moderator: Sijia Cai, Partner, Investment Management, Davis Polk & Wardwell

Cari Lodge, Managing Director, CF Private Equity

**Tori Buffery**, Senior Director and Head of Secondaries, **Nicola Wealth Wandy Hoh**, Head of Infrastructure Secondaries, **Macquarie Group** 

12:00

# Democratization of private markets: the emerging landscape in the US and globally

- Providing an overview of the scope of the opportunity
- Investigating potential risks associated with democratization and proposing effective mitigation strategies
- Analyzing the impact of democratization on GP/LP alignment
- Considering some of the innovative strategies that have been launched and what the future could bring

Moderator: Eileen Duff, Managing Partner, Chief Client Success Officer, iCapital

Lisa Larsson, Partner, StepStone Group

James Del Gaudio, Managing Director, Head of Private Markets, Pennsylvania, Public School

**Employees' Retirement System** 

Jenn Phillips, Chief Revenue and Growth Officer, Forge Global

Kendra Corbett, Partner, Cloverlay



#### 12.35

# Clean tech 2.0: private markets and the transition to net-zero

- How has the IRA transformed activity?
- Innovative ways to invest in an asset class outside of the usual risk/return for the asset class
- The intersection of PE/venture/growth/infrastructure for investing in the energy transition
- How are managers getting LPs comfortable with the different risk/return of investments?

Moderator: Alexandra Wilde, Partner, Clifford Chance

Tara Mei Smith, ESG Integration Officer, NYC Office of the Comptroller

Ashli Aslin, Senior Analyst Real Assets and Infrastructure, Albourne

Jamie Vermie, Managing Principal – Impact Investing, Allstate Investments

**Sarah O'Malley**, Managing Director and Investment Strategist for Energy Infrastructure Credit, **Nuveen Infrastructure** 

13:10 **Lunch** 

Infrastructure Investor	Private Equity International	PERE	Private Debt Investor
Women in	Women in Private	Women in Real	Women in Private
Infrastructure Forum	Equity Forum	Estate Forum	Debt Forum
14:00	14:00	14:00	14:00
Opening remarks	Opening remarks	Opening remarks	Opening remarks
Laurie Mahon, Senior		Gila Cohen, Partner, Chief	
Advisor, Infrastructure		Investment Officer,	
Markets		Vanbarton Group	
14:05	14:05	14:05	14:05
The state of play in the	The state of play in North	The state of play in North	The state of play in North
North American	American private equity	American real estate	American private credit
infrastructure market			
- Is the asset class living up	<ul> <li>Assessing private</li> </ul>	- How is real estate	- How does debt compare
to its reputation as a	equity's performance in	performing amidst	to other strategies in the
hedge against inflation?	relation to other asset	macro and market	current climate?
- Considering the	classes:	challenges?	- To what extent is the
performance of different	- Strategies for enhancing	- In which sub-sectors and	market concerned by the
sub-asset classes in the	PE returns in challenging	regions are there still	refinancing risk?
current environment	times	opportunities?	How are firms evolving
- Where are managers	- Discussion around	- What next for the asset	their strategies in a
seeing opportunities?	market innovations that	class?	challenging fundraising
0 177	managers are employing		environment?
Moderator: <b>Zak Bentley</b> ,			
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Americas Editor,
Infrastructure Investor
Kemi-Christina Abdul,
Managing Director,
BlueHaven
Anna Dayn, Managing
Partner, New End
Leonarda Orani, Managing
Director Infrastructure US,
Ardian
Leonie Maruani, Senior
Director, Vauban
Infrastructure

Moderator: Virginia Lantz,
Vice President, Insight
Sourcing, part of Accenture
Anne Philpott, Managing
Director, Churchill Asset
Management
Lili Cai, Private Equity
Investment Professional,
Swiss Re
Jana Wayne, Managing
Director – Head of
Procurement, Hunter Point
Capital

Moderator: Dan Winters,
Senior Director, GRESB
Julie Donegan, Director of
Real Estate, CalSTRS
Vicky Shiff, CEO, Avrio Real
Estate
Maggie Coleman, Chief
Investment Officer, North
America, Real Estate,
Manulife Investment
Management
Wendy Pryce, Head
Americas Real Estate
Specialist, Nuveen

Moderator: Susan
Burkhardt, Partner, Clifford
Chance
Katherine McElroy,
Managing Director,
Infrastructure Debt US, Fiera
Capital
Keirsten Lawton, Co-Head of
US Private Equity Research,
Cambridge Associates
Meenal Mehta, Co-Head of
Underwriting, Diversified
Lending, Blue Owl Capital

14:45

## **Short turnaround break**

14:50

# Digital infrastructure investing

- The impact of interest rates and inflation on digital infrastructure
- Are there still opportunities in an ultracompetitive space?
- The impact of emerging technologies such as AI & machine learning on digital infrastructure

Moderator: Leslie Wolff
Golden, Managing Director,
Global Head of Capital
Formation and Investor
Relations, Digital Bridge
Canan Anli, Senior Advisor,
PMP Strategy
Danielle Hunt, General
Counsel, Tiger Infrastructure
Partners

### 14:50

# Dealmaking in US private equity

- Are valuations still too high?
- Evaluating whether dealmaking activities are showing signs of recovery
- Identifying hotspots and areas of opportunity

Moderator: Sebnem
Caglayan, Managing
Director, S&P Global Ratings
Julia Wittlin, Partner,
RedBird Capital Partners
Lane McDonald, Managing
Director, Strategy &
Operations, Omers
Chenkay Li, Managing
Director, Direct Equity
Investments, Hamilton Lane

### 14:50

# Where next for logistics and industrial?

- Do they remain attractive for investors?
- Finding opportunities in a crowded market
- Innovative approaches to sustainability and value creation to drive returns

Moderator: Anne Gales,
Partner & Co-Founder,
Threadmark
Sarah Jancot, Senior
Investment Manager,
Unlisted Real Estate, Global
Logistics, NBIM
Geneviève Brassard,
Director, Real Estate
Investments, PSP
Investments
Leslie Himmel, Co-Founder
and Managing Partner,

### 14:50

# The rise of sponsorless deals

- What is the appeal of non-sponsored deals for investors and borrowers?
- How are managers sourcing deals and do they compete with banks?
- How does a manager's skillset differ to sponsored transactions?

Moderator: Sweta Chanda, Managing Director, Head of Business Strategy, Monroe Capital Kerry Dolan, Managing Partner, Brinley Partners Kalina Berova, Portfolio

Manager, BCI Shamafa Khan, Managing Director and Head of Investor Relations and

Himmel + Meringoff
Properties
Patti Unti, Managing
Director, Waterfall Asset
Management

Marketing, Crayhill Capital Management

15:25

### Short turnaround break

15:30

# Investing in emerging technologies: hydrogen, batteries, EV & more

- Examining business models in emerging strategies
- Considering the extent to which these investments are infrastructure
- Investigating the longterm sustainability of battery technology and electric vehicle charging solutions

Moderator: Andrea Logan,
Director, FirstPoint Equity
Vidyu Kishor, Director,
Renewables and Grid
Solutions, Osaka Gas USA
Dr. Barbara Weber,
Founding Partner, B Capital
Partners
Irene Mavroyannis, Global
Co-Head of Business
Development, Infrastructure,
Partners Group (USA)

15:30

# Considering how different strategies are faring in a more challenging environment

- Defining the midmarket: scale and strategies
- What strategies and size of funds are faring well in a challenging market?
- How are investors viewing different strategies on performance and DEI? And is this impacting investment decisions?

Moderator: Stephanie
Smith, Chief Operating
Officer – Equity Private
Markets & Private Markets
Platform, BlackRock
Catherine Hatch, Private
Equity Allocator, Alaska
Permanent Fund
Corporation
Aiyu Yuan Nicholson,
Partner, StepStone Group
Sheryl Schwartz, Chief
Investment Officer, ALTI
Kavita Datta, Investor
Relations and Business

15:30

# Analyzing the current landscape of real estate debt investing

- Investor views on real estate debt during turbulent times
- How are interest rates and inflation affecting real estate debt?
- Predictions for the next decade

Moderator: Samantha

Rowan, Editor, Real Estate
Capital USA
Robin Potts, Partner and
CIO, Canyon Partners Real
Estate
Sarah Schwarzschild, Chief
Operating Officer, Mavik
Capital Management
Wendy Cai-Lee, CEO and
Founder, Piermont Bank
Molly Mahoney, Managing
Director, Slate Asset
Management

15:30 Special situati

# Special situations and distressed debt

- Outlining the scale of the opportunity as more companies run into trouble
- To what extent are managers having to adapt their skillsets in the new normal?
- Identifying sectors and strategies where there are opportunities

Moderator: Maja Zerjal Fink,
Partner, Clifford Chance
Lexi Fallon, Formerly –
Special Situations, CPPIB
Tingting Zhang, Founder &
Chief Executive Officer,
TerraCotta Group
Eric Newman, Treasury
Manager, City of Stamford
Beth Duggan, Associate
General Counsel, Polen
Capital



Development, Cebile Capital	

16:05

**Coffee & networking** 

16:25

# The resilience of infrastructure debt

- How is infrastructure debt performing in the current economy?
- Examining the pivotal role played by infrastructure debt in financing critical projects
- Expectations for fundraising in the next year

Moderator: Mark Rudovic, Principal, Hodes Weill & Associates

Mansi Patel, Managing
Director, Head of
Infrastructure Debt, MetLife
Investment Management
Marie-Noël Ouellet,

Managing Director, Infrastructure Financing, CDPQ

**Kate Dorsey**, Principal, **Stonepeak** 

16:25

# Emerging manager update: how are new strategies performing?

- Fundraising tips for emerging managers in a tough market
- Laying the groundwork for lasting success
- Case studies from the past 12 months

Liz Campbell, Chief
Investment Officer, Portfolio
Advisors
Gayatri Sarkar, Founder and
CEO, Advaita Capital
Michelle Jacobi, Managing

Director, Gatewood Capital Agata Rzamek Praczuk, Director, Metlife Investment Management 16:25

# Multifamily investing: trends, opportunities and potential for expansion

- Why are more firms targeting opportunities in multifamily?
- The importance of regulation in attracting investors
- Considering opportunities beyond the US in this sub-asset class

Moderator: Mary D'Souza, CIO, Misha Investments Erin Miller, Executive Managing Director, NEWMARK Maddi Sampson, Vice

President, International Real Estate, **QuadReal Property Group** 

**Erin Beitz**, Senior Vice President, Residential, **Rockhill Management** 

16:25

# Opportunities in the growing speciality finance space

- How are specialty finance companies changing business models?
- Investigating the adoption of advanced data analytics and technology-driven solutions
- Predictions for the next 5 years

Moderator: Michelle Noyes, Managing Director, Head of Americas, AIMA Nicole Byrns, Alternative Asset Investor, Independent Meggie Daoust, Senior Director, Capital Solutions, CDPQ

Kelsey Read, Director, Capital Markets, Castlelake Rebecca Chia, Head of Business Development and Investor Relations, Atalaya Capital Management

17:10

**Short turnaround break** 

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#### 17:1

# Crystal ball session: what does the future hold for infrastructure?

- The extent to which infrastructure will move further into other asset classes
- Predictions for fundraising and deal volume in the next 18 months
- What is the next megatrend in infrastructure investing?

Moderator: Jane Bowes,
Managing Director,
Threadmark
Janice Ince, Managing
Director, Pantheon
Abigail Leung, Principal,
HOOPP Infrastructure
Kate Roscoe, Senior
Managing Director, Manulife
Investment Management
Sue Yang, Investment
Director – Next Gen, Antin
Infrastructure Partners

#### 17.1

# Venture & growth investing in a bear market

- How have investors adapted to the different macro-environment?
- Understanding the strategies employed by investors to navigate risk and seize opportunities
- Evaluating the role of diversification and adaptive portfolio management

Moderator: David
Bogoslaw, Senior Reporter,
Venture Capital Journal
Summer Zhao, Investment
Director, Lafayette College
Rudina Seseri, Founder &
Managing Partner,
Glasswing Ventures
Kirsten Morin, Partner,
HighVista Strategies
Stephanie Campbell,
General Partner, The
Artemis Fund

### 17:1

# The future of offices in North America

- What will office investing look like in 10 years?
- Future-proofing your office portfolio
- Where in the US and globally are investors seeing opportunities?

Moderator: Tim Savage, Clinical Assistant Professor, NYU Schack Institute of Real Estate

Marion Jones, Managing
Director, JLL Capital Markets
Americas
Gila Cohen, Partner, Chief
Investment Officer,
Vanbarton Group

Investment Officer,
Benenson Capital Partners

Rachel Loeb, Chief

#### 17:15

# Corporate credit in a changing environment

- What is driving the opportunity set for flexible capital providers?
- How to capitalize on corporate opportunities thru market cycles
- Outlook for public and private opportunities

Moderator: Robin
Blumenthal, Americas Editor,
Private Debt Investor
Helena Wang, Principal,
Capital Solutions Group,
CPPIB
Kristina Matthews,
Managing Director, Client &

Kristina Matthews,
Managing Director, Client &
Product Solutions, Onex
Maggie Arvedlund, CEO and
Managing Partner, Turning
Rock Partners

17:50 Cocktail reception



Day Two: May 16

### 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, Managing Director, Head of Business Strategy, Monroe Capital
- Real Estate: Gila Cohen, Partner, Chief Investment Officer, Vanbarton Group

## 09:10

## State of Private Markets: GP Perspectives on the evolution of alternatives

- How are managers modifying their approaches to navigate shifts in interest rates and inflation?
- To what extent are managers incorporating emerging technologies and innovative solutions to gain a competitive edge?
- Anticipating and navigating forthcoming regulatory changes affecting private markets
- Developing younger talent who are experiencing their first bear market

Elisabeth Troni, Managing Director, Fund Manager, CBRE Investment Management

**Lisa Sun**, Managing Director and Co-Head of the BlackRock Secondaries and Liquidity Solutions (SLS), **BlackRock** 

Mirja Lehmler-Brown, Partner, Hayfin

**Kanan Joshi**, Partner, Co-head of North America & Head of Digital Infrastructure, **DIF Capital Partners** 

## 09:45

# Fundraising in a more challenging environment

- Developing a value proposition that articulates how you will thrive
- Adopting an investor-centric approach: how can managers differentiate themselves?
- Highlighting case studies to underscore your fund's ability to adapt and excel in difficult market conditions
- Learnings from those who have been on the road in the last 12 months

Moderator: Fiona Dane, Partner, Head of Investor Relations and Fundraising, Livingbridge Yokasta Segura-Baez, Managing Director, ArcLight Capital Partners Ilene Levinson, Managing Director, Fund Investments, Hamilton Lane



Alexandra Bazarewski, Partner, Rede Partners

Mahsa Zeinali, Senior Vice President, Capital Partnering, Reverence Capital Partners

10:25

PEI Fundraising Report
Bill O'Conor, Managing Director, PEI Group US

10:35

Making co-investments work for all: balancing benefits, fees and trust

- Unlocking benefits for investors and fund managers
- Fee structures in co-investing: striking a balance
- Navigating potential challenges and considerations in co-investing
- GP-led continuation funds: fostering alignment and transparency

Moderator: Chris Janiec, Americas Editor, Agri Investor

Rachel Goldstein, Investment Principal – Co-investments, Partners Capital Elizabeth Weindruch, Managing Director, Barings
Evy Carroll, Senior Associate, Private Equity Co-investments, Mercer Catherine Saunders, Managing Director, Benefit Street Partners

11:15

Coffee & networking

## 11:45

ESG debate: how is sustainability evolving within private markets?

- Assessing the extent to which polarisation is impacting advancements in sustainability within U.S. private markets
- Investigating how the Inflation Reduction Act has transformed the sustainability landscape
- Comparing progress in the US and Europe: is the gap narrowing or widening?
- How are managers dealing with investors with such contrasting views on sustainability?

Moderator: Ali Humphrey, Managing Partner, Arna

Angela Jhanji, Managing Director, Sustainability - Private Capital, EQT Partners

Adriana Becerra Cid, Sustainable Investment Lead for Private Assets, Lombard Odier Asset

Management

Katie Treuer, Principal, Generate

Jennifer Essigs, Head of Sustainability, AE Industrial Partners



### 12:30

# **Private Markets: Investment Committee**

Three hand-picked fund managers will present investment case studies in this exclusive, data-driven and interactive format. Hosted by two experts, you'll have the chance to ask questions, share your thoughts and vote on the transactions in our very own investment committee.

Co Moderator: Laurie Mahon, Senior Advisor, Infrastructure Markets & Jill Haberkern, Partner, Mintz Group

**Amy Wang**, Managing Director (Head of Private Credit), **Blue Earth Capital Priya Grewal**, Investment Manager, **Morrison** 

Jaime Hildreth, Partner, Head of Risk, WestCap Group

### 13:15

# **Themed Seated Networking Lunch Hosted by Mintz Group**

A number of tables throughout the room and the exhibition hall. Attendees can choose which discussion they would like to join

Spotting the Wolf in Sheep's Clothing: Looking for Misconduct and Failures of Integrity that Don't Show Up in Traditional Background Checks

Table 1 - Jill Haberkern (Mintz Group)

Table 2 - Doug Chisholm (Mintz Group)

When Things Get Ugly: Navigating Internal Investigations, Disputes and Legal Challenges"

Table 1 - Jen Cherner (Mintz Group)

Table 2 - Kelsey Froehlich (Mintz Group)

Stay Away, FCPA!: Conducting Integrity Diligence in Unfamiliar Markets

Table 1 - Liza Baron (Mintz Group)

Table 2 - Eleanor Warnick (Mintz Group)

Beneath the Surface: Assessing Workplace Culture to Unlock Value

Table 1 - Mike Karran (Mintz Group)

Table 2 - Kathleen Hurt (Mintz Group)

## 14:30

**Close of conference**