Women in Private Markets Summit North America 2024

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

Women in Private Markets Summit North America 2024

- 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, 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

Women in Private Markets Summit North America 2024

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 Women in Infrastructure Forum | Private Faulty Women in Private Equity Forum | ^{PERE} Women in Real Estate Forum | Privete Debt Women in Private Debt Forum |
|--|--|--|---|
| 14:00 Opening remarks | 14:00 Opening remarks | 14:00 Opening remarks | 14:00 Opening remarks |
| Laurie Mahon, Senior Advisor, Infrastructure Markets | Chris Lane , Managing Director, Head of Institutional Relationship Management, Forge Global | Gila Cohen, Partner, Chief Investment Officer, Vanbarton Group | Kristina Matthews, Managing Director, Client & Product Solutions, Onex |
| 14:05 The state of play in the North American | 14:05 The state of play in North American private equity | 14:05 The state of play in North American real estate | 14:05 The state of play in North American private credit |
| infrastructure market Is the asset class living up to its reputation as a hedge against inflation? Considering the performance of different sub-asset classes in the current environment Where are managers seeing opportunities? | Assessing private equity's performance in relation to other asset classes: Strategies for enhancing PE returns in challenging times Discussion around market innovations that managers are employing | How is real estate performing amidst macro and market challenges? In which sub-sectors and regions are there still opportunities? What next for the asset class? | How does debt compare to other strategies in the current climate? To what extent is the market concerned by the refinancing risk? How are firms evolving their strategies in a challenging fundraising |

Formation and Investor

Relations, Digital Bridge

Danielle Hunt, General

PMP Strategy

Partners

Canan Anli, Senior Advisor,

Counsel, Tiger Infrastructure

Women in Private Markets Summit North America 2024

| | Moderator: Virginia Lantz, | | environment? |
|--|---|---|--|
| Moderator: Zak Bentley, | Vice President, Insight | Moderator: Dan Winters, | |
| Americas Editor, | Sourcing, part of Accenture | Senior Director, GRESB | Moderator: Susan |
| Infrastructure Investor | Anne Philpott, Managing | Julie Donegan, Director of | Burkhardt, Partner, Clifford |
| Kemi-Christina Abdul, | Director, Churchill Asset | Real Estate, CalSTRS | Chance |
| Managing Director, | Management | Vicky Shiff, CEO, Avrio Real | Katherine McElroy, |
| BlueHaven | Lili Cai, Private Equity | Estate | Managing Director, |
| Anna Dayn, Managing | Investment Professional, | Maggie Coleman, Chief | Infrastructure Debt US, Fiera |
| Partner, New End | Swiss Re | Investment Officer, North | Capital |
| Leonarda Orani, Managing | Jana Wayne, Managing | America, Real Estate, | Keirsten Lawton, Co-Head of |
| Director Infrastructure US, | Director – Head of | Manulife Investment | US Private Equity Research, |
| Ardian | Procurement, Hunter Point | Management | Cambridge Associates |
| Leonie Maruani, Senior | Capital | Wendy Pryce, Head | Meenal Mehta, Co-Head of |
| Director, Vauban | | Americas Real Estate | Underwriting, Diversified |
| Infrastructure | | Specialist, Nuveen | Lending, Blue Owl Capital |
| 14:45 | | | |
| Short turnaround break | | | |
| 14:50 | 14:50 | 14:50 | 14:50 |
| | | | |
| Digital infrastructure | Dealmaking in US private | Where next for logistics and | The rise of sponsorless deals |
| Digital infrastructure investing | Dealmaking in US private equity | Where next for logistics and industrial? | The rise of sponsorless deals |
| - | | - | The rise of sponsorless dealsWhat is the appeal of |
| investing | equity | industrial? | |
| investing - The impact of interest | equity - Are valuations still too | industrial? - Do they remain | What is the appeal of non-sponsored deals for |
| investingThe impact of interest rates and inflation on | equity - Are valuations still too high? | industrial?Do they remain attractive for investors? | What is the appeal of non-sponsored deals for |
| investing The impact of interest rates and inflation on digital infrastructure | equity Are valuations still too high? Evaluating whether | industrial? Do they remain attractive for investors? Finding opportunities in | What is the appeal of non-sponsored deals for investors and borrowers? |
| investing The impact of interest rates and inflation on digital infrastructure Are there still opportunities in an ultracompetitive space? | equity Are valuations still too high? Evaluating whether dealmaking activities are | industrial? Do they remain attractive for investors? Finding opportunities in a crowded market Innovative approaches to sustainability and | What is the appeal of non-sponsored deals for investors and borrowers? How are managers sourcing deals and do they compete with |
| investing The impact of interest rates and inflation on digital infrastructure Are there still opportunities in an ultracompetitive space? The impact of emerging | equity Are valuations still too high? Evaluating whether dealmaking activities are showing signs of recovery Identifying hotspots and | industrial? Do they remain attractive for investors? Finding opportunities in a crowded market Innovative approaches | What is the appeal of non-sponsored deals for investors and borrowers? How are managers sourcing deals and do they compete with banks? |
| 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 & | equity Are valuations still too high? Evaluating whether dealmaking activities are showing signs of recovery Identifying hotspots and areas of opportunity | industrial? Do they remain attractive for investors? Finding opportunities in a crowded market Innovative approaches to sustainability and value creation to drive returns | 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 |
| 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 | equity Are valuations still too high? Evaluating whether dealmaking activities are showing signs of recovery Identifying hotspots and areas of opportunity Moderator: Sebnem | 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, | 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 |
| 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 | 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 | 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, | 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? |
| investing The impact of interest rates and inflation on digital infrastructure Are there still opportunities in an ultra- competitive space? The impact of emerging technologies such as AI & machine learning on digital infrastructure Moderator: Leslie Wolff | 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 | 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 | 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, |
| 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 | 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 | 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, | 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? |

Unlisted Real Estate, Global

Leslie Himmel, Co-Founder

Logistics, NBIM

Geneviève Brassard,

Director, Real Estate

Investments, **PSP**

Investments

Capital

Manager, BCI

Kerry Dolan, Managing

Partner, Brinley Partners

Kalina Berova, Portfolio

Shamafa Khan, Managing Director and Head of

Lane McDonald, Managing

Director, Strategy &

Operations, Omers

Women in Private Markets Summit North America 2024

| 15:25 Short turnaround break | | and Managing Partner, Himmel + Meringoff Properties Patti Unti, Managing Director, Waterfall Asset Management | Investor Relations and Marketing, Crayhill Capital Management |
|---|---|---|---|
| 15:30 | 15:30 | 15:30 | 15:30 |
| Investing in emerging | Considering how different | Analyzing the current | Special situations and |
| technologies: hydrogen, | strategies are faring in a | landscape of real estate | distressed debt |
| batteries, EV & more | more challenging | debt investing | |
| Examining business models in emerging strategies Considering the extent to which these investments are infrastructure Investigating the long- term 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) | environmentDefining the mid- | Investming Investming 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 | 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 |

Women in Private Markets Summit North America 2024

| | Development, Cebile Capital | | |
|--|--|--|--|
| 16:05 Coffee & networking 16:25 The resilience of infrastructure debt | 16:25 Emerging manager update: how are new strategies | 16:25 Multifamily investing: trends, opportunities and | 16:25 Opportunities in the growing speciality finance space |
| 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 | performing? Fundraising tips for emerging managers in a tough market Laying the groundwork for lasting success Case studies from the past 12 months Moderator: Michael Sabin, Partner, Clifford Chance 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 | 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 | 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 | | | |
| 17:15 Crystal ball session: what does the future hold for infrastructure? | 17:15 Venture & growth investing in a bear market | 17:15 The future of offices in North America | 17:15 Corporate credit in a changing environment |

Women in Private Markets Summit North America 2024

- 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**

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

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 Rachel Loeb, Chief Investment Officer, **Benenson Capital Partners**

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 & Product Solutions, **Onex Samantha Papir**, Senior Vice President, Investment, **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: Ali Humphrey, Managing Partner, Arna
- Private Debt: Sweta Chanda, Managing Director, Head of Business Strategy, Monroe Capital

Women in Private Markets Summit North America 2024

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

Moderator: Ruth Yang, Managing Director, Global Head of Private Market Analytics, S&P Global Ratings

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 Katie Moore, Managing Director, Fund Investment & Managed Solutions, 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

Women in Private Markets Summit North America 2024

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

Alison Fenton-Willock, Director, KKR

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

Women in Private Markets Summit North America 2024

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