

RFK COMPASS WINTER INVESTORS CONFERENCE

MIAMI BEACH, FLORIDA | FEBRUARY 26-28, 2023

AGENDA

SUNDAY, FEBRUARY 26

EDEN ROC MIAMI BEACH

4:00 PM **REGISTRATION OPENS**
Eden Roc II Foyer

6:00 PM **COCKTAIL RECEPTION**
Eden Roc Garden

Remarks by **Sancia Dalley**, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference

Remarks by **Tobias Read**, Treasurer, State of Oregon

7:00 PM **NETWORKING DINNER**
Eden Roc Garden (seating is pre-assigned; RSVP is required)

Chaired by Marvin Rosen, Shareholder, Greenberg Traurig and Co-Chair, RFK Compass Investors Conference

Fireside Chat | A Conversation with **Jonathan Gabel**, Chief Investment Officer, Los Angeles County Employees Retirement Association (LACERA) and **William Costigan**, Managing Director, Guggenheim Partners

9:00 PM **DAY ONE CONCLUDES**

MONDAY, FEBRUARY 27

EDEN ROC II AB, EDEN ROC MIAMI BEACH

8:00 AM

NETWORKING BREAKFAST

Spa Garden. Registration will be open in Eden Roc II Foyer

Transition to Eden Roc II AB for the conference

9:00 AM

OPENING REMARKS

Eden Roc II AB

Kerry Kennedy, President, Robert F. Kennedy Human Rights

9:15 AM

DEEP DIVE | THE BATTLE FOR ESG: CENTERING THE FRAMEWORK FOR RISK-ADJUSTED RETURNS

Context Setting with Michael Posner, Director, NYU Stern Center for Business and Human Rights

PANEL DISCUSSION

Lorena Buck, Managing Director, Ariel Alternatives

Steven Cobb, Managing Director, Pearl Energy Investments

Sanaz Raczynski, Managing Director, Head of Sustainability/ESG, Kohlberg & Company

Amanda Van Dyke, Managing Director, ARCH Sustainable Resources Fund

Moderator: **Michael Posner**, Director, NYU Stern Center for Business and Human Rights

10:40 AM

FIRESIDE CHAT | DISPUTING THE STATUS QUO

A conversation with **Ursula Burns**, Founding Partner, Integrum Holdings and **Kerry Kennedy**, President, Robert F. Kennedy Human Rights

11:15 AM

NETWORKING BREAK

Eden Roc II Foyer

11:35 AM

DIFFERENTIATING THE KEY TO SUCCESS: HOW EMERGING MANAGERS ARE BREAKING THROUGH THE NOISE (PART I)

Nick Antoine, Co-Founder and Managing Partner, Red Arts Capital

Marquette Chester, Senior Managing Director, Head of Alternatives, Xponance, Inc.

Colin Meadows, Managing Partner, o15 Capital Partners

Moderator: **Renae Griffin**, Managing Director, GCM Grosvenor

MONDAY, FEBRUARY 27

EDEN ROC II AB, EDEN ROC MIAMI BEACH

12:25 PM **FIRESIDE CHAT | SUPPORTING EMERGING MANAGERS IN THIS FUNDRAISING CYCLE – PERSPECTIVES FROM TWO PENSION FUNDS**

A conversation with **Sylvester McClearn**, Interim Director of Emerging Manager Programs, New York State Common Retirement Fund (NYSCRF) and **Kirk Sims**, Senior Director, Head of Emerging Manager Program, Teacher Retirement System of Texas (TRS). Moderated by **Marvin Rosen**, Shareholder, Greenberg Traurig and Co-Chair, RFK Compass Investors Conference.

Transition to Spa Garden for Lunch

1:20 PM **LUNCH AND KEYNOTE FIRESIDE CHAT | THE STATE OF SOFTWARE INVESTING**

Spa Garden

A conversation with **David Breach**, President and Chief Operating Officer, Vista Equity Partners and **Katie Moore**, Managing Director and Head of Emerging & Diverse Investing, Hamilton Lane

Transition to Eden Roc II AB

2:35 PM **NAVIGATING CHANGE AS INVESTORS IN PRIVATE MARKETS - PERSPECTIVES FROM GPS ACROSS THE SECTOR SPECTRUM**

Francisco Alvarez-Demalde, Co-Founder and Managing Partner, Riverwood Capital

Lamar Cardinez, Principal, Blue Owl Capital

Hala Fadel, Managing Director, Growth, Eurazeo

Michael Fisch, Founder and Chief Executive Officer, American Securities

Jonas Nilsson, Partner, Cinven

Moderator: Elizabeth Weindruch, Managing Director, Private Investments, Barings

3:35 PM **FIRESIDE CHAT | LEVERAGING PUBLIC MARKETS AS AN ENTRY POINT FOR PRIVATE INVESTMENTS**

A conversation with **Adam Wyden**, Chief Investment Officer and Founding Partner, ADW Capital, and **Tobias Read**, Treasurer, State of Oregon

4:10 PM **NETWORKING BREAK**

Eden Roc II Foyer

MONDAY, FEBRUARY 27

EDEN ROC II AB, EDEN ROC MIAMI BEACH

4:30 PM

THE CREDIT LANDSCAPE TODAY: RISKS, RETURNS AND OPPORTUNITIES

Steve Catera, Managing Director and Co-Head of Credit Opportunities and Capital Markets, Siris Capital

Mark Evans, Principal Investment Officer, Private Equity and Private Credit, State of Connecticut Retirement Plans and Trust Funds

Jeff Levin, Managing Director and Co-Head of North America Private Credit, Morgan Stanley Investment Management

Moderator: **David Scopelliti**, Global Head of Private Debt, Mercer

5:20 PM

DAY 1 CLOSING REFLECTIONS AND ANNOUNCEMENTS

Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference

Transition to Spa Terrace

5:45 PM

NETWORKING COCKTAIL RECEPTION

Spa Terrace

6:30 PM

NETWORKING DINNER

Spa Garden

Chaired by Kerry Kennedy, President, Robert F. Kennedy Human Rights

Fireside Chat | A Conversation with **Deven Parekh**, Managing Director, Insight Partners and **J. David Enriquez**, Advisory Board Member, RFK Compass Investors

Fireside Chat | A Conversation with **Aaron Sack**, Head of Capital Partners, Morgan Stanley Investment Management and **Marvin Rosen**, Shareholder, Greenberg Traurig and Co-Chair, RFK Compass Investors Conference

8:30 PM

DAY TWO CONCLUDES

TUESDAY, FEBRUARY 28

EDEN ROC II AB, EDEN ROC MIAMI BEACH

7:45 AM **NETWORKING BREAKFAST**
Spa Garden

7:45 AM **INVITATION ONLY: MEET THE EMERGING MANAGER
BREAKFAST ROUNDTABLE**
Rivo Alto Meeting Room



This breakfast is by invitation-only and open to emerging manager funds and LPs only. Special thanks to Apogem Capital for sponsoring the breakfast.

Transition to Eden Roc II AB

9:00 AM **CONFERENCE CO-CHAIR'S REMARKS**

Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference

9:05 AM **FIRESIDE CHAT | DIVERSIFYING CAPITAL FOR PUBLIC-PRIVATE PARTNERSHIPS**

A conversation with **Bailey DeVries**, Associate Admonistrator, Office of Investment and Innovation, U.S. Small Business Administration and **Chaz Cocuzza**, Senior Managing Director, Apogem Capital

9:35 AM **DIFFERENTIATING THE KEY TO SUCCESS: HOW EMERGING MANAGERS ARE
BREAKING THROUGH THE NOISE (PART II)**

Joe Benavides, Managing Partner, OceanSound Partners
R. Kenneth Bryant, Managing Partner, Sidereal Capital Group
Al Goldstein, Chairman and Chief Executive Officer, StoicLane
Reyno Norval, Partner, IDEA Group, Orion Infrastructure Partners
Nicholas Singer, Founder and Managing Member, Purchase Capital
Moderator: **Kirk Sims**, Senior Director, Head of Emerging Manager Program, Teacher Retirement System of Texas (TRS)

TUESDAY, FEBRUARY 28

EDEN ROC II AB, EDEN ROC MIAMI BEACH

- 10:30 AM** **THE EVER-CHANGING REAL ESTATE MARKET - A DISCUSSION ON TRENDS, OPPORTUNITIES, AND SOCIETAL IMPACT**
- Gila Cohen**, Chairperson, Independent Investment Advisory Board, Mitsubishi UFJ Financial Group (MUFG)
John Ege, Partner, KSL Capital Partners
Will Gibby, Director Fund Management, Global Residential and International Real Estate, Federated Hermes Limited
Sonny Kalsi, Co-Chief Executive Officer, BentallGreenOak
Jeff Krasnoff, Chief Executive Officer, Rialto Capital Management
Moderator: Jonathan Schein, Chief Executive Officer and Executive Director, Real Estate Limited Partner Institute (RELPI)
- 11:20 AM** **NETWORKING BREAK**
Eden Roc II Foyer
- 11:40 AM** **IN CONVERSATION | CREATING INCLUSIVE INVESTMENT STRATEGIES AND TEAMS FOR GREATER RETURNS AND IMPACT**
- Tracy S. Harris**, Trustee, District of Columbia Retirement Board
Jarvis Hollingsworth, Board Chair, Teacher Retirement System (TRS) of Texas
Jeffrey Siminoff, Senior Vice President, Workplace Dignity, Robert F. Kennedy Human Rights
Moderator: Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference
- 12:15 PM** **WHAT'S AHEAD FOR PRIVATE EQUITY IN 2023 - RISKS AND OPPORTUNITIES**
- Adam Fliss**, Founding Partner and General Counsel, Patient Square Capital
Marc Morris, Co-Chief Executive Officer and Investment Committee Co-Chair, Carrick Capital Partners
Scott Spielvogel, Managing Partner, One Rock Capital Partners
Fernando Vazquez, Investment Officer, Private Equity, New York State Common Retirement Fund
Willie Woods, President and Co-Founder, ICV Partners
Moderator: David Fann, Senior Managing Director and Vice Chairman, Apogem Capital

TUESDAY, FEBRUARY 28

EDEN ROC II AB, EDEN ROC MIAMI BEACH

1:05 PM

CLOSING REMARKS

Sancia Dalley, Senior Vice President, Investor Engagement and Strategic Partnerships, Robert F. Kennedy Human Rights and Co-Chair, RFK Compass Investors Conference

1:20 PM

CLOSING NETWORKING LUNCH

Spa Terrace

“It is from numberless diverse acts of courage and belief that human history is shaped. Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and crossing each other from a million different centers of energy and daring, those ripples build a current that can sweep down the mightiest walls of oppression and resistance.”

— **Robert F. Kennedy**, University of Cape Town, June 6, 1966