



NASP SOUTHERN CALIFORNIA
2024 ANNUAL DAY OF EDUCATION IN PRIVATE EQUITY
FOR TRUSTEES AND STAFF CONFERENCE
Thursday, March 21, 2024
Ritz-Carlton Hotel ~ Marina Del Rey, California

Agenda

NASP is continuously updating the agenda for our event and panel times are subject to change. Please check our website page at www.naspsocal.org/conference.htm#agenda for the latest information and/or to download the latest version of the agenda.

Wednesday, March 20th Agenda

(Private Event — Sponsors, Trustees and Staff Only)

5:00 PM PRE-CONFERENCE DINNER

Thursday, March 21st Agenda

7:30 AM REGISTRATION & NETWORKING BREAKFAST

8:00 AM GENERAL SESSION SEATING BEGINS

8:10 AM WELCOME & OPENING REMARKS

Norice R. Rice, President – National Association of Securities Professionals –
Southern California Chapter

8:20 AM NASP NATIONAL OVERVIEW

Miguel Thames, President & CEO – National Association of Securities Professionals

8:30 AM MORNING KEYNOTE SPEAKER

Gordon Johnson, Economist — GLJ Research, LLC



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9:00 AM

GENERAL SESSION I – PRIVATE EQUITY I

Buyout + PE: The Growing Importance/Focus on Specialization for GPs and LPs

PE allocations from institutional LPs started with Generalist Buyout managers, then evolved into specialists who now dominate the space – Are the same things happening in broader PE?

Moderator:

Rob Ross, Portfolio Manager, Private Equity — California State Teachers' Retirement System (CalSTRS)

Panelists:

Logan Allin, Managing Partner & Founder — Fin Capital

Ryan Buntain, Head of Investor Relations — Knox Lane

Joseph Haslip, Managing Director — Valor Equity Partners

Tanaka Maswoswe, Partner, Managing Director — Carlyle

Greg Shell, Partner, Head of Inclusive Growth Strategy-Sustainable Investing Group — Goldman Sachs Asset Management

Joanne Yoo, Partner — Development Partners International, LLC (DPI)

9:45 AM

NETWORKING BREAK



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10:00 AM GENERAL SESSION II – VENTURE CAPITAL

Venture Capital – Managing in Current Times

Today's Venture Capitalists must manage the crosscurrents of ongoing technological innovation, market uncertainty, and a complicated geopolitical environment to be resilient.

Moderator:

Wilkin Ly, CAIA, Deputy Chief Investment Officer — Los Angeles City Employees' Retirement System (LACERS)

Panelists:

Laureen R. Costa, CFA, Managing Director & Portfolio Manager — J.P. Morgan Asset Management

David DiPietro, Head of Centralized Private Equity Team — T. Rowe Price

Tarrell Gamble, 2nd Vice Chair of the Board of Retirement — Alameda County Employees' Retirement Association (ACERA)

Van Jones, Deal Lead — Wellington Access Ventures

Steve Reale, Partner & Chief Financial Officer — Ulu Ventures

Aakar Vachhani, Managing Partner — Fairview Capital

10:45 AM GENERAL SESSION III – PRIVATE CREDIT

The Wave Continues

Despite the denominator effect and liquidity pressures, Private Credit remains the preferred asset class across private markets. This panel will explore trends in private credit.

Moderator:

Trevor Jackson, Managing Director — Askia

Panelists:

Robert China, Managing Partner and Chief Investment Officer — Three Line Capital

Jeri Harman, Founder & Chairman — Avante

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

Brendan McCaffrey, Managing Director, Head of Capital Markets & Trading —
TPG Angelo Gordon

Sengal Selassie, CEO and Managing Partner — Brightwood Capital Advisors

Eric Smith, Chief Executive Officer, Managing Partner and Founding Partner —
Locust Point Capital

11:30 AM NETWORKING BREAK

12:00 PM LUNCHEON SERVICE BEGINS

12:20 PM SPONSOR RECOGNITIONS

Speakers:

Debra Draughan, Member — National Association of Securities Professionals —
Southern California Chapter

Lesley Nettles, Chapter Secretary — National Association of Securities Professionals —
Southern California Chapter

12:25 PM FAST-TRACK PROGRAM

1:30 PM NETWORKING BREAK



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2:00 PM FIRESIDE CHAT

Moderator:

Adele Tagolao, Chair — Orange County Employee Retirement Systems (OCERS)

Speaker:

Marty Nesbitt, Founder and Co-Chief Executive Officer — The Vistria Group

2:30 PM GENERAL SESSION IV – THE ALLOCATORS’ PERSPECTIVE

Inflation, Interest Rates, and Fed Watching...

A sharper focus on various risks in 2024 while generating maximum returns and considering market rebound and interest rate soft landing.

Moderator:

Elizabeth Burton, CAIA, Managing Director and Client Investment Strategist —
Goldman Sachs Asset Management

Panelists:

Carina Coleman, Chief Investment Officer — San Diego City Employees’ Retirement System (SDCERS)

Alison Romano, Chief Executive Officer & Chief Investment Officer — San Francisco Employees’ Retirement System (SFERS)

Alyssa Rieder, Chief Investment Officer — CommonSpirit Health

3:15 PM NETWORKING BREAK

3:30 PM

GENERAL SESSION V – PRIVATE EQUITY II

What's New?

Thematic areas of growth opportunities in 2024, such as health, sports/entertainment, technology, real estate, and AI.

Moderator:

John Greenwood, Investment Manager, Private Equity —
California Public Employees' Retirement System (CalPERS)

Panelists:

Ed Bialas, Managing Director — First Reserve

Jason Howard, Founder, Managing Partner — New Catalyst Strategic Partners

Onay Payne, Senior Managing Director — Manulife Investment Management

Ladell Robbins, Managing Director and Head of BlackRock Impact Opportunities (BIO) — BlackRock

Vania Schlogel, Founder & Managing Partner — Atwater Capital

4:15 PM

GENERAL SESSION VI – CONSULTANT ROUNDTABLE

Market Perspectives, Challenges & Opportunities

Moderator:

Rod June, Chief Investment Officer — Los Angeles City Employees' Retirement System (LACERS)

Panelists:

Sam Austin, Partner — NEPC, LLC

Trevor Jackson, Managing Director — Askia

David Sancewich, Managing Principal — Meketa Investment Group

Gabrielle Zadra, Senior Managing Director — Cliffwater LLC



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GENERAL SESSION VII – PRIVATE EQUITY III AND PRIVATE CREDIT

The Conversation Continues

Moderator:

Jim Rice, Principal Investment Officer — Los Angeles County Employees Retirement Association (LACERA)

Panelists:

David Fann, Senior Managing Director / Vice Chair — Apogem Capital

Gordon Hargraves, Senior Partner, Investor Relations & Strategy — Novacap

Adama Kah, Chief Investment Officer — Kah Capital Management

André Rice, President — Muller & Monroe Asset Management, LLC

Shundrawn A. Thomas, Founder and Managing Partner — The Copia Group, LLC

Alan Weinfeld, CFA , Partner — Invesco

5:30 PM

CONFERENCE CLOSING RECEPTION

Reception begins immediately after conference.