

# 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

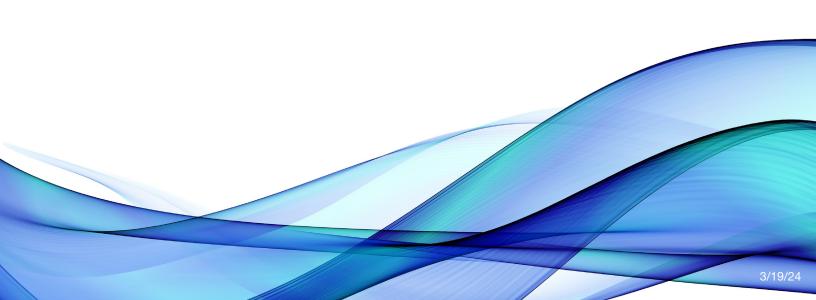
Norice R. Rice, President – National Association of Securities Professionals – Southern California Chapter

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

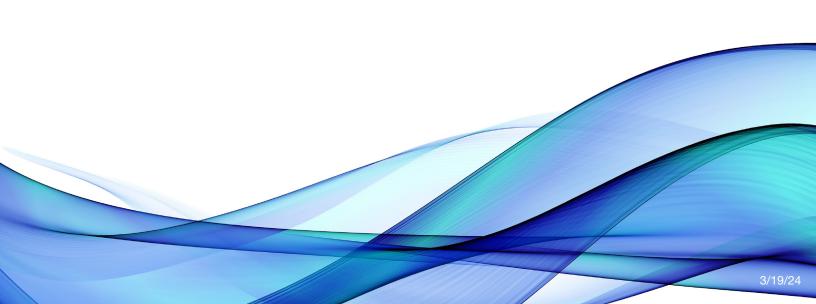
**Joseph Haslip, Managing Director** — Valor Equity Partners

**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

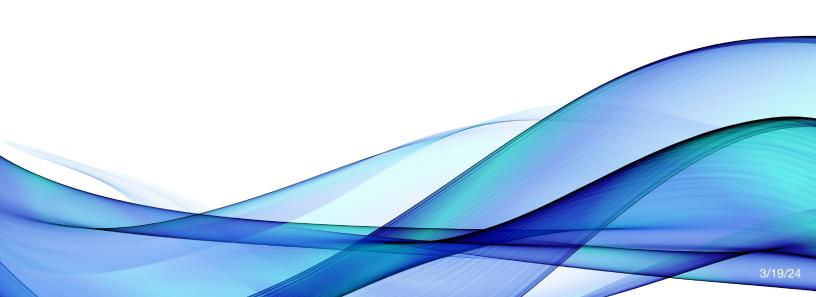
**David DiPietro, Head of Centralized Private Equity Team** − T. Rowe Price

**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





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### 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

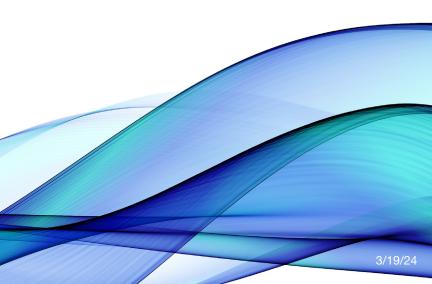
#### **Speakers:**

**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

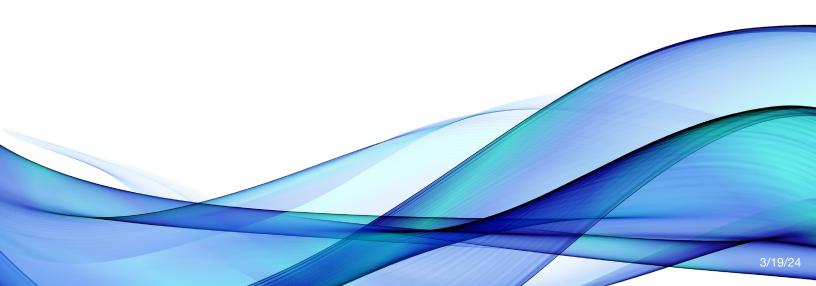
### **Panelists:**

**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





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## 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 Al.

#### **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)

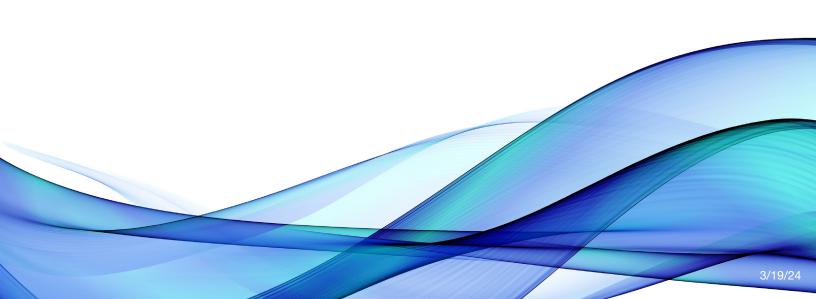
#### **Panelists:**

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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## 4:45 PM 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.

