



Women in Private Markets Summit: North America
New York
June 20-21 - 2023

Showcasing diverse talent across private markets

08.00

Registration and coffee

08.45

PEI Welcome

8:50

Chairperson's opening remarks

Laurie Mahon, Vice Chair, Global Investment Banking, **CIBC Capital Markets**

9:00

Keynote Speech: Building your band

Jennifer Prosek, Founder and Managing Partner, **Prosek Partners**

9:25

Asset allocations to private markets in a more challenging environment

- To what extent has the slump in equities led investors to sell off holdings in private markets?
- Does appetite for co-investment remain high?
- How can managers differentiate themselves in a crowded field? Have investors turned down funds due to lack of diversity? What pressure are they putting on?

Leslie Vargas, CFA, Portfolio Manager, **Resolution Life US**

Kathryn Liao, Managing Principal, Private Equity Group, **Allstate**

Lara Pollock, Associate, **Alaska Permanent Fund Corporation**

Julie Donegan, Portfolio Manager, **CalSTRS**

Jennie Benza, Investment Manager, Private Markets, **General Electric Pension**

10:05

How are industry leaders addressing diversity in their institutions?

- Is the industry doing enough to drive change?
- Are investors' demands on diversity increasing?
- Case studies of innovative recruiting to ensure diverse candidate pools
- Tips for success in your career in private markets

Moderator: Sharis Pozen, Regional Managing Partner, Americas, **Clifford Chance**

John Anderson, Global Head of Corporate Finance and Infrastructure, **Manulife**

Ruulke Bagijn, Chair of the Board, **AlpInvest**

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<p>13:45</p> <p>The state of play in the North American infrastructure market</p> <ul style="list-style-type: none"> - Dissecting the need for new investment in secular trends such as digitalisation and decarbonisation - Exploring Biden's National Infrastructure Project Assistance programme investment in national infrastructure projects - Examining infrastructure investor strategies in the current landscape <p>Moderator: Jessica Springsteen, Partner, Clifford Chance Kemi-Christina Abdul, Managing Director, BlueHaven Senior representative, Ares Hillary Higgins, Managing Director, Stonepeak Senior representative, Macquarie</p>	<p>13:45</p> <p>The state of play in North American private equity</p> <ul style="list-style-type: none"> - Putting dry powder to work in a challenging economic environment - To what extent are managers seeing current disruption as an opportunity? Where are they? - Fundraising experiences of the past 12 months and predictions for the next 12 <p>Moderator: Joanne Taylor, Partner & Managing Director, Alix Partners Melissa Grant, Portfolio Advisor, Aksia Jill Shaw, Managing Director, Cambridge Associates Griffin Edwards, Principal, Apollo Global Management</p>	<p>13:45</p> <p>The state of play in North American real estate</p> <ul style="list-style-type: none"> - Opportunities and challenges in the North American real estate markets - Investing in inflationary and recession scenarios - Where is capital coming from and where is it going? <p>Gila Cohen, Chair, Investment Advisory Board, MUFG Danielle Even, Principal, Real Estate Investments, GCM Grosvenor Kathryn Gernert, Managing Director, Emerging Manager Program and Senior Portfolio Manager, Real Estate, Texas Permanent School Fund Corporation Jessica Wichser, Managing Director, Co-Head Private Real Estate Asset Management, Partners Group</p>	<p>13:45</p> <p>The state of play in North American private credit</p> <ul style="list-style-type: none"> - How are macro headwinds influencing investor appetite and how can investors gain a competitive edge? - Outlook for fundraising and deal flow - Key factors that will drive returns in the asset class <p>Moderator: Debra Franzese, Partner, Seward & Kissel Colleen Longobardi, Managing Director, Audax Private Debt Hallie Ransone, Portfolio Manager, Private Credit, Liberty Mutual Investments Emily Shiau, Principal, Adams Street Partners Kirsten Hagen, Co-Founder & Partner, Brinley Partners</p>
<p>14:25</p> <p>Short turnaround break</p>			
<p>14:30</p> <p>How has the Inflation Reduction Act created opportunities in renewables?</p> <ul style="list-style-type: none"> - Exploring the evolution of the traditional renewable subsectors: solar, 	<p>14:25</p> <p>Examining the opportunity of the democratization of private equity</p> <ul style="list-style-type: none"> - How is changing regulation paving the way for more retail access? 	<p>14:25</p> <p>The future of offices: where are opportunities in a rapidly evolving market?</p> <ul style="list-style-type: none"> - How to make existing stock attractive for companies and employees 	<p>14:25</p> <p>Diversifying your portfolio and selecting strategies for 2023 and beyond</p> <ul style="list-style-type: none"> - Which strategies across the capital structure are investors generally flocking to and what's

<p>wind and battery storage</p> <ul style="list-style-type: none"> - Green hydrogen and carbon capture and storage: the rising stars of renewable investments and how they've evolved - Dissecting the energy trilemma – efficiency, environmental impact and affordability <p>Moderator: Isabel O'Brien, Reporter, Americas, Infrastructure Investor Lindsay Luger, Co-founder & Partner, Energy Impact Partners Senior representative, Ares Julie Bell, Chief Commercial Officer, CleanCapital Violeta Rabanal, Senior Director – Head of Corporate Development, Mitsubishi Power</p>	<ul style="list-style-type: none"> - What are the challenges preventing faster growth? - Examining some of the dangers of democratization, how best to address them <p>Moderator: Snehal Shah, Reporter, New Private Markets, PEI Group Kristin Olson, Head of Alternative Capital Markets, Goldman Sachs Private Wealth Management Michelle Gannot, Principal, Head of Investments, Exigent Capital Stephanie Strid Davis, Co-Head of US Private Wealth Solutions, Hamilton Lane</p>	<ul style="list-style-type: none"> - Repurposing and retrofitting to address the risk of stranded assets - Which local markets are most interesting for investors? <p>Isabelle Martin, Head of Strategic Partnerships, United States and Latin America, Ivanhoe Cambridge Chelsea Perino, Managing Director, Global Marketing and Communications, The Executive Centre Tim Savage, Clinical Assistant Professor, NYU Schack Institute of Real Estate Patti Unti, Managing Director, Head of Commercial Real Estate Equity, Waterfall Asset Management</p>	<p>performing best in the current market?</p> <ul style="list-style-type: none"> - What types of strategies are LPs demanding? - How is fundraising faring against various strategies; e.g mezzanine, secondaries, ABL <p>Moderating: Michelle Noyes, Managing Director, Head of Americas, AIMA Lan Cai, Deputy Chief Investment Officer, The Pension Boards – United Church of Christ Nicole Byrns, Formerly, CPPIB America Catherine Saunders, Managing Director, Benefit Street Partners Nicole Adrien, Managing Director, Chief Product Officer and Global Head of Client Relations, Oaktree Capital Management</p>
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<p>15:10 Short turnaround break</p>			
<p>15:15 How infrastructure managers can invest across the digital ecosystem</p> <ul style="list-style-type: none"> - Exploring what inflation protection is in place for existing digital infrastructure funds and assets - Determining the growth of digitalisation, smart city tech and the Internet of Things 	<p>15:15 How and why does appetite for coinvestments continue to increase?</p> <ul style="list-style-type: none"> - What are the drivers for increased demand? - To what extent are co-investment opportunities a primary driver in fund commitments? - How are co-investments being structured? <p>Anna Dayn, Managing Partner, New End</p>	<p>15:15 Will rising interest rates and a slowing economy bring an end to the warehouse bubble?</p> <ul style="list-style-type: none"> - Predictions for the next two years: what markets are still performing? - Future proofing assets – how to get ahead of the constantly evolving supply chain management - Where to find opportunities for investment in a more 	<p>15:15 ESG & impact integration: sustainability linked loans & more</p> <ul style="list-style-type: none"> - Can sustainability linked loans really bring about a significant change in practices and drive value? - Key challenges of ESG consideration in private debt - How can investment firms effectively access ESG data and

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