THE 19TH ANNUAL
MIT SLOAN INVESTMENT CONFERENCE

THRIVING IN THE UNKOWN: CAPITALIZING ON CHANGE AND DISRUPTION

February 9th, 2024
Intercontinental Boston

AGENDA

Time	3rd Floor	2nd Floor
9:00am - 9:10am	Opening Remarks	
9:10am - 9:25am	Opening Keynote Intro	
9:25am - 10:00am	Opening Keynote: David Breach	
10:10am - 10:50am	Private Credit Panel	Impact Panel
11:00am - 11:40am	Private Equity Panel	Emerging Markets Panel
11:50am - 12:30pm	Keynote 2: Karen Karniol-Tambour	
12:30pm - 1:10pm	Lunch	

Click on schedule items to jump
to panel information and speaker bios.

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AGENDA CONTINUED

Time	3rd Floor	2nd Floor
1:10pm - 1:50pm	Public Markets Panel	Venture Capital Panel
2:00pm - 2:40pm	Keynote 3: Claudia Sahm and Barry Ritholtz	
2:50pm - 3:30pm	Real Estate Panel	Growth Equity Panel
3:40pm - 4:20pm	Family Office Panel	Technology Panel
4:30pm - 5:10pm	Keynote 4: Vivjan Myrto	
5:10pm - 5:15pm	Thank you / Wrap Up	

Click on schedule items to jump
to panel information and speakerbios.

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EVENTIDE

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KEYNOTE PANEL

Keynote Speaker

David Breach
President, COO
Vista Equity Partners

Moderator

Michael Rees
Co-President
Blue Owl Capital

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KEYNOTE SPEAKER

David Breach
President, COO
Vista Equity Partners

David Breach is the President and Chief Operating Officer of Vista Equity Partners (Vista), a leading global investment firm that focuses exclusively on enterprise software, data and technology-enabled businesses. Mr. Breach directs Vista's business operations and supports the firm's fundraising and investment activities. He serves on Vista's Executive Committee, Private Equity Management Committee and Private Equity Funds' Investment Committee.

Prior to his current role, Breach served as Vista's Chief Legal Officer from 2014 to 2021. He was previously a Senior Corporate Partner at the law firm Kirkland & Ellis, where he represented private equity funds and was a founding partner of the firm's San Francisco office.

Throughout Breach's career, he has been a thought leader in the legal and investment communities, most recently sharing his insights as part of Investment Magazine's "Market Narratives" podcast and the Wall Street Journal Pro's series, "WSJ Special Access."

Mr. Breach earned his B.B.A. in marketing from Eastern Michigan University and received his J.D. from the University of Michigan Law School.

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KEYNOTE MODERATOR

Michael Rees
Co-President
Blue Owl Capital

Michael Rees is a Co-President of Blue Owl Capital Inc., a member of the firm's Executive Committee and a member of the firm's board of directors. Mr. Rees is also the Head of the GP Strategic Capital platform. Previously, Mr. Rees founded Dyal Capital, the predecessor firm to Blue Owl's GP Strategic Capital Platform. Prior to founding Dyal Capital, Mr. Rees was a founding employee and shareholder of Neuberger Berman Group, transitioning from Lehman Brothers as part of the management buyout transaction in May 2009, and was the first Chief Operating Officer of Neuberger's alternatives business. Mr. Rees was an employee of Lehman Brothers from April 2001 through May 2009. He had numerous roles at Lehman Brothers and was responsible for strategic acquisitions for the Investment Management Division. From 2003 through 2006, he was Head of Asset Management Strategy. Prior to joining Lehman Brothers, he was an associate at Marakon Associates.
Mr. Rees currently serves on the Board of Directors of The Feinstein Institutes for Medical Research of Northwell Health and on the Board of the Opportunity Network, an education-focused nonprofit that supports underserved students with postsecondary and career readiness education.

Mr. Rees received a MS in Mechanical Engineering and a MS in Technology Policy from Massachusetts Institute of Technology, and a BS in Mechanical Engineering and a BA in Political Science from the University of Pittsburgh.

KEYNOTE PANEL

Keynote Speaker

Karen Karniol-Tambour
Co-Chief Investment Officer
Bridgewater Associates

Moderator

Telis Bertsekas
Lecturer,
Head of the Finance Certificate
MIT Sloan School of Management

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KEYNOTE SPEAKER

Karen Karniol-Tambour

Co-Chief Investment Officer
Bridgewater Associates

Karen Karniol-Tambour is Co-Chief Investment Officer at Bridgewater Associates, responsible for managing the company’s investment process. Karen oversees the systemization of Bridgewater’s research into trading strategies, manages the development of proprietary investment management models, directs the design and implementation of client investment strategies, and publishes timely market understanding to clients and global policy makers via Bridgewater’s Daily Observations. She also co-leads the firm’s Sustainable Investing efforts, overseeing the design of new investment solutions with both financial and sustainability objectives. Karen joined Bridgewater in 2006 after graduating from Princeton University. She serves on the boards of Search for Common Ground and Seeds of Peace. Karen is a World Economic Forum Young Global Leader, was included in Fortune’s "40 Under 40" most influential leaders in business in 2019, and has been named to Barron's list of "Most Influential Women in US Finance" for three years in a row.

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KEYNOTE MODERATOR

Telis Bertsekas

Lecturer,
Head of the Finance Certificate
MIT Sloan School of Management

Telis Bertsekas is the MBA Finance Certificate Head at the MIT Sloan School of Management and the lecturer for 15.403 (Introduction to the Practice of Finance).

He has spent the last 22 years working as an analyst and portfolio manager at firms including Fidelity Investments, MFS Investment Management, and SAC Capital Advisors. Since 2000, Bertsekas has specialized in managing public equity mutual fund and hedge fund portfolios in the global technology sector. He currently serves as the co-founder of Axiomada, a long/short equity hedge fund focused on the global technology sector.

Bertsekas holds an undergraduate degree in economics from MIT and an MBA from the MIT Sloan School of Management.

KEYNOTE PANEL

Keynote Speakers

Claudia Sahm
Founder
Sahm Consulting

Barry Ritholtz
Cofounder, Chairman, CIO
Ritholtz Wealth Management, LLC

Moderator

Daniel Dart
General Partner
Rock Yard Ventures

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KEYNOTE SPEAKER

Claudia Sahm

Founder

Sahm Consulting

Claudia Sahm is a well-known Washington-based expert on monetary and fiscal policy and forecasting. She has several years of experience advising decision-makers at the Federal Reserve, White House, and Congress. She created a highly accurate recession indicator, the Sahm rule. Sahm is the founder of Sahm Consulting and Stay-at-Home Macro (SAHM) Substack. Previously, she was a section chief at the Federal Reserve and a senior economist at the Council of Economic Advisers. Sahm holds a Ph.D. in Economics from the University of Michigan (2007), and a bachelor's degree in economics, political science, and German from Denison University (1998).

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KEYNOTE SPEAKER

Barry Ritholtz

Cofounder, Chairman, CIO
Ritholtz Wealth Management, LLC

Barry L. Ritholtz is co-founder, chairman, and chief investment officer of Ritholtz Wealth Management LLC. Launched in 2013, RWM is a financial planning and asset management firm, with over $3 billion dollars in assets under management. RWM was named ETF Advisor of the Year, is on the Financial Times Top 300 Advisors in the US, and is the 4th fastest-growing RIA in America.

His career history is filled with cutting-edge innovation and new ideas: He was one of the earliest traders to embrace behavioral economics, he created one of the first and most popular market blogs; his podcast was groundbreaking and among the earliest in the investment spaces. Named one of the "*15 Most Important Economic Journalists*" in the United States, he has been called one of the *25 Most Dangerous People in Financial Media*. He writes a weekly column for Bloomberg Opinion (2013- 2021) and wrote a twice-monthly column on Personal Finance and Investing for The Washington Post (2011-2016).

He is the creator and host of Masters in Business, the most popular podcast on Bloomberg Radio. These 60-90 minute conversations are with many of the most accomplished, fascinating people in business and finance. The ground-breaking podcast quickly set the standard for business interviews and helped "podcastify" Bloomberg. It gets streamed or downloaded 8-10 million times per year.

He is the author of *Bailout Nation* (Wiley, 2009; updated paperback 2010). *Bailout Nation* became one of the best-reviewed books on the crisis.

KEYNOTE MODERATOR

Daniel Dart
General Partner
Rock Yard Ventures

Daniel Dart is the founder of Solo GP fund Rock Yard Ventures. A leader and advocate for underserved and underprivileged communities, he has worked on the ground, helping build equity and social movements on both a local and global scale. In addition to being published in Harvard Business Review and the World Economic Forum, he has presented his academic and economic research worldwide.

Daniel's journey to where he is today is anything but typical. He was born in the Bay Area but spent most of his youth in Southern California. He experienced homelessness on the streets of San Diego and Los Angeles between 1999-2001, a chapter of time that shapes everything he does today. Daniel was also the brainchild of a prominent punk-rock band, Time Again, where he wrote and sang about social issues, poverty, and getting through life one day at a time. In 2011, he was sentenced to 6 years in prison, where he filed and won an appeal to reduce his sentence by two years. Upon release, with a new perspective of owning his flaws while being true to himself, he made amends and launched the second chapter of his life – one that focuses on the altruistic value of helping others.

He is currently completing his Executive MBA at MIT, where he is the first formerly incarcerated student in the school's history and a recipient of the Dean's Fellowship, Sloan Leadership Fellowship, and Pechacek Fellowship awards and scholarships. He is an active member of Milken Institute's Young Leaders Circle, an Advisory Board Member of Village Capital, a Board Member of Skid Row Housing Trust, and a Fellow of the Salzburg Global Forum.

KEYNOTE PANEL

Keynote Speaker

Vivjan Myrto
Founder,
Managing Partner
Hyperplane

Moderator

Daniel Dart
General Partner
Rock Yard Ventures

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KEYNOTE SPEAKER

Vivjan Myrto

Founder,
Managing Partner
Hyperplane

Vivjan started his first business at 7, then at 13, joined the first ISP as employee number 4, and started selling Internet access in the mid-90s in his home country of Albania. Moved to the US in 2001, and after starting 2 other tech companies and a non-profit here in the Boston area, he started Hyperplane alongside John Murphy as the first pre-seed/seed AI dedicated fund with their first investment in 2013, now with a portfolio of over 65 investments. Since then, he has been focusing on industrial/deep tech companies that span from robotics to drug discovery and agriculture and have led investments in Tive, ShipIn, Butlr, GreenEye, Elucidata, Aryeo (Acq. Zillow), Soft Robotics, Modulate, Dexai Robotics, MachineMetrics, and others.

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KEYNOTE MODERATOR

Daniel Dart
General Partner
Rock Yard Ventures

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PRIVATE CREDIT PANEL

Moderator

Tim Donahue
Global Head of
Capital Solutions
Lazard

Panelists

Alex Chi
Co-Head of Private Credit
Goldman Sachs Asset
Management

Steve Ruby
Co-Head of
Originated Debt
Audax Private Debt

Michael Hadley
CIO, Head of Underwriting
of Direct Lending
Carlyle

Derek O'Leary
Global Head of
Private Wealth
Blue Owl Capital

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PRIVATE CREDIT PANEL

Moderator

Tim Donahue

Global Head of Capital Solutions
Lazard

Tim Donahue is Vice Chairman of Investment Banking and the Global Head of Capital Solutions at Lazard. Tim joined Lazard in September 2022 from J.P. Morgan, where he was most recently Vice Chairman of Capital Markets. Tim took on this role in 2020 after having left the firm for two years to serve as CFO and Executive Vice President of Alterra Mountain Company in Denver, Colorado, a company with over 25,000 employees at its seasonal peak.

Prior to joining Alterra in 2018, Tim spent over 20 years at J.P. Morgan where he worked in various leadership roles within leveraged finance and capital markets. Tim spent three years in Hong Kong as head of J.P. Morgan's Asia-Pacific debt platform and was also the founding partner of Blackstone's credit investment business in Asia-Pacific, GSO Capital Partners. Subsequently, Tim returned to New York where he ran J.P. Morgan's High Yield and Leveraged Loan Capital Markets group for close to a decade, maintaining its preeminent position as #1 in the league tables for leveraged loans and bonds in each of those 10 years.

Prior to investment banking, Tim practiced corporate securities law at Battle Fowler LLP in New York City (now part of Paul Hastings). He received his JD from Fordham University School of Law in Manhattan and his BA in Sociology, Liberal Arts from Fordham University in the Bronx.

PRIVATE CREDIT PANEL

Speaker

Alex Chi

Co-Head of Private Credit
Goldman Sachs Asset Management

Alex is America's co-head of Private Credit within Goldman Sachs Asset Management. He was named co-chief executive officer and co-president of Goldman Sachs BDC, Inc. in 2022. He is a member of the Asset Management Private Credit Investment Committee, Specialty Lending Group Investment Committee and BDC Investment Committee. Alex also serves on the Americas Inclusion and Diversity Committee, the Asset & Wealth Management Inclusion and Diversity Council, is the head of the Asian Network in the Americas and is the firmwide recruiting captain for the Massachusetts Institute of Technology (MIT).

Prior to joining Goldman Sachs Asset Management, he worked in the Financial and Strategic Investors Group (FSIG) within the Investment Banking Division from 2006 to 2019. Alex joined Goldman Sachs in 1994 as an analyst and spent his first three years at the firm across the Information Technology, Fixed Income Capital Market and Leveraged Finance groups. He was named managing director in 2006 and partner in 2012.

Alex serves on the Board of Directors for the JED Foundation and the Korean American Community Foundation. Alex earned a BS from MIT in 1994.

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PRIVATE CREDIT PANEL

Speaker

Steve Ruby

Co-Head of
Originated Debt
Audax Private Debt

Steve is the Co-Head of Originated Debt at Audax Private Debt, overseeing the unitranche and junior debt investment teams. He is responsible for originating and executing new investments and monitoring portfolio companies. Steve is also a member of the credit committee for originated investments.

Prior to joining Audax in 2003, Steve was an Analyst at Greenwich Street Capital Partners. He also previously worked as a Financial Analyst at DLJ Investment Partners, which became Credit Suisse Private Equity's dedicated mezzanine fund.

Steve received an HBA from the Richard Ivey School of Business and a BA from the University of Western Ontario.

PRIVATE CREDIT PANEL

Speaker

Michael Hadley

CIO, Head of Underwriting of Direct Lending
Carlyle

Michael Hadley is the Chief Investment Officer and Head of Underwriting of Carlyle Direct Lending and a Managing Director in Global Credit based in New York. He has primary responsibility for Carlyle's investment efforts in Direct Lending. Prior to his current role, Mr. Hadley was a Senior Analyst in the US Loans & Structured Credit group focused on investment opportunities in cyclical industrials.

Prior to joining Carlyle, Mr. Hadley was an Analyst at Katonah Debt Advisors where he focused on leveraged loan and high yield investments across multiple sectors. Mr. Hadley started his career at The Chase Manhattan Bank, where he worked as an investment banker in both the Structured Credit Products and Global Chemicals groups.

Mr. Hadley received his undergraduate degree from Florida A&M University.

PRIVATE CREDIT PANEL

Speaker

Derek O'Leary

Global Head of
Private Wealth
Blue Owl Capital

As Global Head of Private Wealth, Derek leads the wealth business across regions to bring the full breadth of Blue Owl's Credit, GP Strategic Capital, and Real Estate platforms to financial advisors and their high-net-worth clients. Derek oversees the wealth business and leadership team across product development, capital raising distribution and sales, strategic partnerships, client servicing, and marketing. Derek is one of the founding employees of Blue Owl Capital in 2021, he previously built and lead the private wealth channel at Owl Rock, the predecessor firm to Blue Owl's Credit platform.

Prior to joining Owl Rock in 2016, Derek served as President of CION Securities, the dealer manager for CION Investment Corporation, a non-traded business development company sub-advised by Apollo Investment Management. Before joining CION Securities, Derek spent over a decade in the asset management business with Merrill Lynch, Salomon Brothers Asset Management and Goldman Sachs Asset Management.

Derek holds a BA from Seton Hall University. He resides in Jacksonville, Florida with his wife and has 3 children.

IMPACT PANEL

Moderator

Gita Rao
Senior Lecturer of Finance
Associate Faculty Director MFin Program
MIT Sloan School of Management

Panelists

Roy Swan
Head of Mission Investments
Ford Foundation

Marc Robert
Partner, COO
Water Asset Management

Justin Kulla
Partner of Impact Investing and ESG
Consequential Capital

Mitali Prasad
Lead Portfolio Manager,
Growth and Income
Trilium Asset Management

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IMPACT PANEL

Moderator

Gita Rao

Senior Lecturer of Finance
Associate Faculty Director MFin Program
MIT Sloan School of Management

Gita joined the MIT Sloan finance faculty with over two decades of experience in global investing, asset allocation and serving major institutional clients. Rao has deep expertise in ESG and impact investing, particularly the integration of ESG into investment portfolios. She managed the first global ESG portfolio in the United States, developed and teaches a course on impact investing at MIT Sloan, and is Faculty Director for the MIT Sloan Impact Investing Initiative.

She has published in the Review of Accounting Studies and appeared in media including Bloomberg, CNN, and Foreign Affairs among others. Rao has been a president of the Society of Quantitative Analysts, on the editorial board of the Financial Analysts Journal, on the board of trustees of the Research Foundation of the CFA Institute, and an Assistant Professor at the University of Illinois at Urbana-Champaign.

She holds a PhD in finance from the University of Rochester, an MBA from the Indian Institute of Management, Ahmedabad, and a BA in economics (Honors) from Delhi University's St. Stephen's College in India. She was born in New Delhi, India and lives in Brookline, MA.

IMPACT PANEL

Speaker

Roy Swan leads the Ford Foundation's Mission Investments team, managing its global portfolio of impact investments and grantmaking to support the ESG disclosure and impact investing fields. Formerly, he served as Morgan Stanley's Managing Director and Co-head of Global Sustainable Finance. Roy's background includes corporate law, finance, and investment banking and he holds a bachelor's degree from Princeton University and a law degree from Stanford Law School. Roy has served on several nonprofit and corporate boards, and he is currently a board member of the Global Impact Investing Network (GIIN), Parnassus Funds, and Freddie Mac (effective 2/19/24). In 2023, Roy was appointed to the Church Commissioners for England Oversight Group, which was formed to advise on a groundbreaking £100 million impact investment fund created with the Church of England's assets in acknowledgement of and accountability for its sponsorship of the transatlantic chattel slave trade.

Roy Swan

Head of Mission Investments

Ford Foundation

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IMPACT PANEL

Speaker

Marc Robert

Partner, COO
Water Asset Management

Since 2006 Mr. Robert has been Chief Operating Officer and a Partner at Water Asset Management, a global investor in water companies and assets ensuring water availability and quality. Prior to joining Water Asset Management LLC, he was a Managing Director at Morgan Stanley, a member of the Equity Capital Commitment Committee, North American Equity Management Committee, and the Equity Research Stock Selection Committee. Mr.Robert is presently the Board Chair of WaterAid America, a global charity focused on providing access to safe water and sanitation and Board Chair of Sylvester Manor Educational Farm in Shelter Island NY. He graduated from Brown University in 1982 with a BA in Religious Studies.

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IMPACT PANEL

Speaker

Justin Kulla

Partner of Impact Investing and ESG
Consequential Capital

Mr. Kulla began his career at Credit Suisse where he was an engineer working in New York, London and Zurich, and at Google where he worked in business development. Following business school, Justin joined the Hearst Corporation's venture capital group focused on early-stage internet and media investments. In 2010, Justin was a founding member of Weld North, an education technology private equity firm backed by KKR. During his tenure at Weld North, Justin invested in Edgenuity, Imagine Learning, The Learning House and Performance Matters and held senior operating roles including as Chief Technology Officer at Edgenuity. In 2015, Justin founded and served as CEO of BusinessBlocks, an education technology company for working adults and small businesses. BusinessBlocks was acquired in 2017 by AmTrust Financial Services, a Fortune 500 insurance company, and following the acquisition Justin served as SVP of M&A and Investments. Justin serves as a member of the Board of Directors of Errigal, Inc., Force Management Holdings, LLC, and ATS Parent, LLC.

Justin holds BS and MISM degrees from Carnegie Mellon University, an MBA from Massachusetts Institute of Technology and an MPA from Harvard University. He's a lecturer and mentor at Stanford, Menlo College, USC, and Tulane, a board advisor at 826 National, and a Term Member on the Council on Foreign Relations.

IMPACT PANEL

Speaker

Mitali Prasad

Lead Portfolio Manager,
Growth and Income
Trilium Asset Management

Mitali is the Lead Portfolio Manager on the ESG Growth & Income strategy and a Portfolio Manager for the ESG Large Cap Core and ESG Small/Mid Cap Core strategies. She is also a Research Analyst covering Industrials and Materials sectors. She joined Trillium in 2016 and previously served as a portfolio manager and equity research analyst at Washington Capital Management, where she covered multiple industry sectors and managed MID and SMID GARP portfolios. She held similar portfolio manager and equity analyst roles at OFI Institutional (Oppenheimer Funds) and Babson Capital Management, where she started her career in 1994.

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PRIVATE EQUITY PANEL

Moderator

Lee Feldman
Partner, Cochair of
Private Equity Finance
Choate

Panelists

Chad Strader
Cofounder
Managing Partner
Red Arts Capital

Nicholas Scola
Cohead of Buyouts
Abry

Mayur Desai
Managing Director
Charlesbank

Dan Carr
Cofounder
Alpaca Real Estate

THE 19TH ANNUAL
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PRIVATE EQUITY PANEL

Moderator

Lee Feldman

Partner, Cochair of Private Equity Finance
Choate

Co-chair of Choate's Private Equity Group, Lee Feldman helps private equity funds and their portfolio companies to successfully complete buyouts, recapitalizations, growth equity investments and exit transactions, in a variety of industries, including software and technology, healthcare, business services, and financial services. He also represents private companies in mergers and acquisitions and other transactions across a variety of industries.
Lee has represented numerous private equity sponsors, including Cove Hill Partners, Mainsail Partners, Riverside Partners, Serent Capital, and Sverica Capital.

Previously, Lee served as Senior Vice President and General Counsel of American Dental Partners, Inc. (Nasdaq: ADPI), a portfolio company of Summit Partners.
In addition to his practice, Lee is a former member of Choate's Executive and Compensation Committees.

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PRIVATE EQUITY PANEL

Speaker

Chad Strader

Cofounder
Managing Partner
Red Arts Capital

Chad Strader is a Co-Founder and Managing Partner for Red Arts Capital. Before forming Red Arts in 2015, Chad invested in private equity transactions at Woodlawn Partners and held finance and accounting roles at PepsiCo.

Beyond Red Arts, Chad is a Term Member at the Council of Foreign Relations, and a member of the Young Leaders Circle at The Milken Institute and Young Presidents' Organization (YPO). He also serves as a Board Member of Big Shoulders Fund and member of The Chicago Club and The Economic Club of Chicago. Chad received an MBA from The University of Chicago Booth School of Business and a BBA in Accounting from Georgia Southern University.

PRIVATE EQUITY PANEL

Speaker

Nicholas Scola

Cohead of Buyouts

Abry

Nick is the Co-Head of Abry's Buyout Funds and a member of the firm's Investment Committee. Nick leads the firm's buyout investment activity within healthcare and business services.

Prior to Abry, Nick has worked at, H.I.G. Capital, Capital Resource Partners, and. Broadview International. He also received a B.A. from Tufts University in Economics.

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PRIVATE EQUITY PANEL

Mayur Desai

Managing Director

Charlesbank

Speaker

Mayur Desai is a Managing Director at Charlesbank, where he leads investments in growing software companies. He first joined Charlesbank in 2009 to work with the Flagship Private Equity team before going to business school. He returned in 2015 and helped launch the firm’s Technology Opportunities strategy in 2019.

With over a decade of technology investing experience, Mayur helps companies identify and focus on the right levers to drive their business. He has been active in business-building across a number of Charlesbank investments by developing organic growth initiatives, executing numerous follow-on acquisitions and recruiting talented senior leaders.

Mayur previously worked at Bain & Company, Audax Group and Vector Capital. He earned a BS in physics and a BS in electrical engineering & computer science from the Massachusetts Institute of Technology and an MBA from Harvard Business School.

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PRIVATE EQUITY PANEL

Dan Carr

Cofounder

Alpaca Real Estate

Speaker

Daniel Carr is a Co-Founder and Managing Partner of Alpaca Real Estate. In this capacity, he is responsible for the Firm's investment strategy, capital markets, asset management, portfolio management and is a member of the Investment Committee and the Board of Directors of ARE.

Prior to forming Alpaca Real Estate, Mr. Carr was a Principal with global alternative investment manager Ares Management (NYSE: ARES). During his ten-year tenure, he was responsible for acquisitions, asset management, and portfolio management for the firm's core, value add, and opportunistic vehicles including commingled funds, co-investments, separately managed accounts, and an evergreen private REIT. Mr. Carr actively participated in the fundraising, deployment, and realization of over $7 billion of transactions through direct acquisitions, syndications, and joint venture partnerships. He also managed and mentored a team of investment professionals from Analyst to Vice President levels.

In 2014 and together with Mr. Weiss, they co-founded and actively lead the Real Estate Private Equity Network (REPEN), a forum for industry professionals to exchange market intelligence, investment insights, and promote mentorship. Additionally, he is Co-Chair of ULI New York's Urban Development and Mixed-Use Council (UDMUC), previously served on the ULI New York Advisory Board, and supports his local community through the Cobble Hill Association.

EMERGING MARKETS PANEL

Moderator

Shari Loessberg
Senior Lecturer
MIT Sloan School of Management

Panelists

Hershel Mehta
General Partner,
Cofounder
2am VC

Nicolas J. Peña
Managing Director
Manulife Investment
Management

Ram Thirukkonda
Senior Investment Strategist
Acadian Asset Management

Jamie Tadelis
Head of Americas and
Business Development
SC Lowy

THE 19TH ANNUAL
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EMERGING MARKETS PANEL

Shari Loessberg

Senior Lecturer
MIT Sloan School
of Management

Moderator

Shari Loessberg is a Senior Lecturer in Technological Innovation, Entrepreneurship, and Strategic Management at the MIT Sloan School of Management.

She is an experienced entrepreneur and investor in established and emerging markets. She has particular experience in emerging market venture capital fund formation, entrepreneurship in emerging economies, and the evolving issues and standards of corporate governance in the United States and abroad. She has served on and led a number of public, private and non-profit boards, and is active in a number of educational programs on board education globally.

At MIT, Loessberg focuses on entrepreneurial ecosystem acceleration as a faculty member of the MIT Regional Entrepreneurship Acceleration Program, with a primary interest around increasing access to capital. Her teaching focuses on increasing student engagement with and learning from emerging and frontier market startups, scaleups, and ecosystems globally, as well as engaging science and engineering students with venture capital and other funding sources in entrepreneurship.

Loessberg holds an AB from Georgetown University and a JD from the University of Texas.

EMERGING MARKETS PANEL

Speaker

Hershel Mehta

General Partner,
Cofounder
2am VC

Hershel Mehta is an early-stage Venture Capitalist and Angel Investor. He launched the US arm of Mehta Ventures in 2018 and has invested in over 50 US and global startups. In 2021, he launched 2am VC which is an early-stage sector agnostic Gen Z-focused India venture firm. 2am VC has backed 45 Indian-based startups. He has invested in four unicorns to date including Zepto, CoinDCX, Axiom Space, and Block.One.

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EMERGING MARKETS PANEL

Speaker

Nicolas J. Peña

Managing Director
Manulife Investment Management

Nicolas J. Peña is a managing director at Manulife Investment Managemen and serves as sector leader of the Emerging Markets Fixed-Income Research Team. Prior to Manulife, he has worked at Sentinel Investments and Morgan Stanley.

He holds an MBA from the MIT Sloan School of Management and a Bachelors from Columbia University.

THE 19TH ANNUAL
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EMERGING MARKETS PANEL

Speaker

Ram Thirukkonda

Senior Investment Strategist
Acadian Asset Management

Ram joined Acadian in 2018 and is a Senior Investment Strategist on the Client Advisory Team, aligned closely with Acadian's Global Client Group and Investment Team. Prior to joining Acadian, Ram was a quantitative research analyst on the asset allocation team at GMO, focused on portfolio construction, risk models, and signals. Ram also previously worked as a quantitative analyst at Batterymarch Financial Management, where he conducted research on quantitative equity portfolios. Ram holds an M.S. in financial engineering and an M.S. in transportation engineering/operations research from MIT and B.Tech. in civil engineering from Indian Institute of Technology. He is a CFA charterholder and a member of CFA Society Boston, as well as a CAIA charterholder and a member of the CAIA Association.

EMERGING MARKETS PANEL

Speaker

Jamie Tadelis

Head of Americas and Business Development
SC Lowy

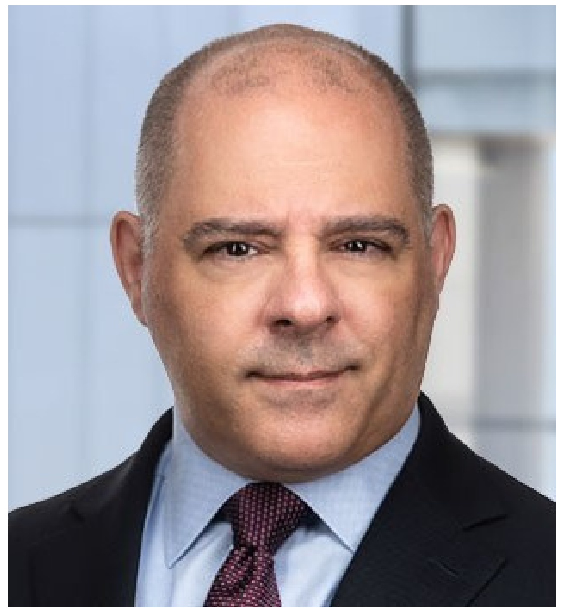
Jamie is one of the co-founders of SC Lowy. He is currently focused on Business Development and is based in our New York office. He previously held a variety of roles within the firm including Head of Sales, General Counsel, and Chief Compliance Officer, all located in Hong Kong. Prior to joining SC Lowy, Jamie was General Counsel, Chief Compliance Officer and a member of the Investment Committee of Abax Global Capital, a Hong Kong based special situations asset manager. Prior to Abax, he was a member of Avenue Capital Group's Asia-focused investment team in New York and then Hong Kong where he provided legal structuring expertise and helped navigate investments through various bankruptcy and restructuring regimes across APAC. While in New York, Jamie was a restructuring attorney at Kramer Levin and he began his career at JPMorgan in emerging markets structured products. He holds a BA with a concentration in MIS from the State University of New York at Albany, and a J.D. from Fordham University School of Law.

PUBLIC MARKETS PANEL

Moderator

Shelley Rosensweig
Partner
Haynes Boone

Panelists



George Patterson
CIO
PGIM Quantitative Solutions

Cate Faddis
Senior Portfolio Manager
Zevin Asset Management

Charlotte Hamill
Partner
Bracebridge Capital

Anne-Marie Fink
CIO
State of Wisconsin
Investment Board

THE 19TH ANNUAL
MIT SLOAN
INVESTMENT CONFERENCE

PUBLIC MARKETS PANEL

Moderator

Shelley Rosensweig

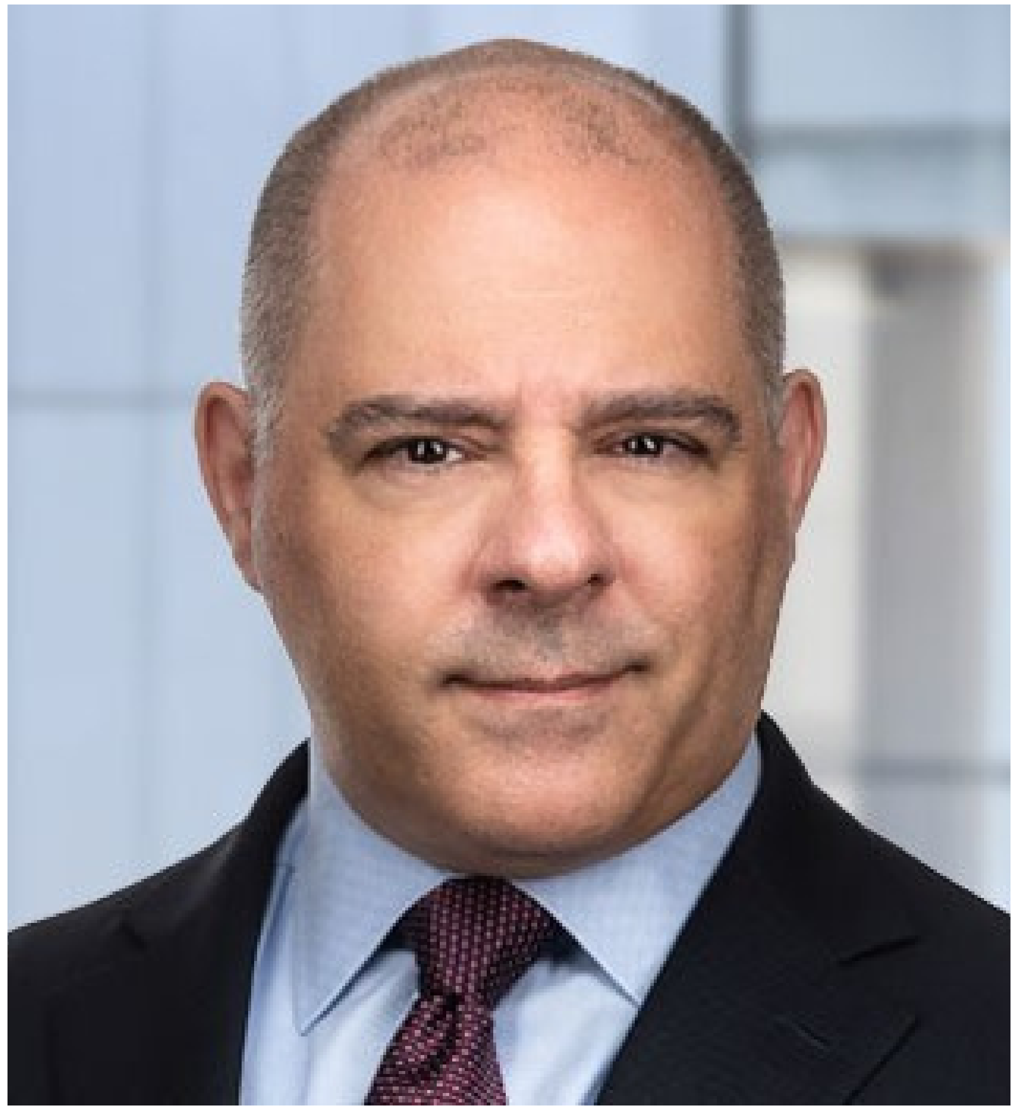
Partner

Haynes Boone

Shelley Rosensweig is co-head of the New York Investment Management and Private Equity Practice Groups and global co-head of the Business Development Committee at Haynes and Boone. She structures, designs and organizes US and non-US private investment funds and assists clients with seed capital arrangements, the operation of managed account platforms and the organization and design of joint ventures, SPVs and other co-investment structures. Shelley also advises clients with respect to SEC, FINRA and CFTC regulatory and compliance matters, family office related matters, trading issues and employment matters. She further advises clients with respect to distribution and capital raising matters and other strategic initiatives.

PUBLIC MARKETS PANEL

Speaker



George Patterson

CIO

PGIM Quantitative Solutions

George N. Patterson, PhD, CFA, CFP, is a Managing Director and the Chief Investment Officer for PGIM Quantitative Solutions. In this capacity, he oversees all portfolio management and research efforts for both the Quantitative Equity and Multi-Asset teams. Prior to his current role, George was the Co-Head of PGIM Quantitative Solutions' Quantitative Equity team, overseeing portfolio management, investment research and new product development. Before joining PGIM Quantitative Solutions, George was a Managing Director, Corporate Strategy, at Axioma, Inc., focusing on identifying buy-side trends and market opportunities. Previously, he was the Chief Investment Officer for Quantitative Investments at Bank of Montreal Global Asset Management, with responsibilities across global equities and multi-asset strategies spanning stand-alone asset allocation funds, FX overlays, retail fund of funds and ETF-based multi-asset solutions. In addition, George was a Co-Founder and Managing Partner at Menta Capital LLC, a California-based quantitative equity hedge fund, and a Senior Portfolio Manager in equity market neutral strategies at Barclays Global Investors. He began his career at NASA's Jet Propulsion Laboratory. George earned a BS in physics from the Massachusetts Institute of Technology and a PhD in physics from Boston University.

PUBLIC MARKETS PANEL

Speaker

Cate Faddis

Senior Portfolio Manager
Zevin Asset Management

As a portfolio manager, Cate serves both individual and institutional clients. Cate leverages her enthusiasm for fundamental research and valuation and her depth of knowledge to help her clients meet their financial goals.
Cate has over 25 years of experience in investment management and financial services. Before joining Zevin Asset Management, was the president and chief investment officer of Grace Capital and managing partner at Mason Capital Partners, a firm Cate grew from assets under management of $100M to over $1B. Cate started her career as an auditor and CPA at Deloitte, and then became an equity analyst at Putnam Investments covering global and emerging market banks (Spain, South Africa, Switzerland, and Latin America). She serves on the executive board of the Boston Economic Club, the board of directors of La Tienda Corp and is a corporator for the Cambridge Savings Bank. She has been a frequent guest correspondent on CNBC and Bloomberg Markets. She earned a BBA from the College of William & Mary and an MBA from Harvard Business School. Cate is a CFA charter holder and member of the CFA Institute.

Having lived in Ghana, Pakistan and Spain, Cate is passionate about economic development, youth employment, and the effects of climate on vulnerable population groups. Cate is multilingual, a proud mother of twins, and a beekeeper.

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PUBLIC MARKETS PANEL

Speaker

Charlotte Hamill

Partner

Bracebridge Capital

Charlotte Hamill is a principal at Bracebridge Capital focused on both the firm's structured products and energy transition assets. Bracebridge is a Boston-based hedge fund manager with approximately $11 billion under management. For over 25 years, the firm has focused on generating returns that are largely uncorrelated with broad moves in equities, currencies, and rates. Ms. Hamill is the co-head of the firm's structured products group and is the portfolio manager for commercial real estate-related investments, including U.S. and European commercial mortgage-backed bonds, synthetic indices, loan portfolios, direct asset holdings, and other bespoke structures. Ms. Hamill is also involved in evaluating non-performing loan and complex instrument trades spanning residential, commercial, and unsecured consumer debt in the global ABS portfolio. Additionally, she is the portfolio manager for our environmental markets investments including carbon credits and related derivatives. She joined Bracebridge Capital in 2006. Ms. Hamill graduated cum laude from Harvard University with an A.B. in Applied Mathematics and Economics and a citation in French.

PUBLIC MARKETS PANEL

Speaker

Anne-Marie Fink

CIO
State of Wisconsin
Investment Board

Anne-Marie Fink serves as the State of Wisconsin Investment Board's Chief Investment Officer for Private Markets and Funds Alpha. At SWIB since 2020, she is responsible for overseeing more than $70 billion in assets in private equity, real estate, hedge funds, externally managed accounts, private debt, and venture capital portfolios, and a team of 38 professionals. Anne-Marie has more than two decades of investment management experience. She served as the chief investment officer for the Employees' Retirement System of Rhode Island and for a large family office. Anne-Marie started her investment career at JP Morgan, where she spent more than 16 years as an equity and hedge fund analyst. Before SWIB, she was at State Street Global Advisors as the portfolio strategist for alternative investments. Anne-Marie earned a Bachelor of Arts degree from Yale University and an MBA from Columbia Business School. She is also the author of The Money Makers: How Extraordinary Managers Win in a World Turned Upside Down, which draws on investors' experience to identify best practices in business management across companies and industries.

THE 19TH ANNUAL
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VENTURE CAPITAL PANEL

Moderator

Kyle Gross
Managing Director
Citizens Private Bank

Panelists

CJ Reim
Cofounder,
Managing Partner
Amity Ventures

Ben West
Partner
Juxtapose

Madeline Darcy
Managing Partner
Kaya Ventures

Ali Mahmoud
Principal
Glasswing Ventures

THE 19TH ANNUAL
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VENTURE CAPITAL PANEL

Moderator

Kyle Gross

Managing Director

Citizens Private Bank

Kyle Gross is a managing director at Citizens Private Bank, where he focuses on venture and innovation economies. In addition to his work at Citizens, Kyle serves on the founding team of Storied, a newsletter profiling New England tech startups.

Prior to his current role, Kyle has served as Director of Tech and VC at First Republic Bank, Director of Strategy (Northeast) at WeWork, and Director of Strategic Initiatives at American Inno.

Kyle Gross received his B.A. in International and Global Studies at Brandeis University. He also serves in the Global Shapers Community at the World Economic Forum and as a mentor at SSC Venture Partners.

THE 19TH ANNUAL MIT SLOAN INVESTMENT CONFERENCE

VENTURE CAPITAL PANEL

Speaker

CJ Reim

Cofounder,
Managing Partner
Amity Ventures

CJ co-founded Amity in 2016 with a view to partner with the world's best technology companies. Guided by his vision for "permanent software," CJ dedicates his time and expertise to helping entrepreneurs develop and scale their businesses. CJ currently serves on the boards of Avochato, Copilot, Ditto, Element Wallet, Fount, and MaintainX in addition to managing the firm's investments in Carta and Talkdesk among others.

With over a decade of experience in the digital asset ecosystem, CJ has been at the forefront of blockchain technology. He is an Initial Contributor to Core DAO, an investor in multiple leading crypto exchanges, and was a participant in the original Genesis Block of Ethereum.

Prior to founding Amity, CJ was a Vice President at Highland Capital Partners in Palo Alto where he focused on technology investments across all stages of company growth.

CJ graduated with a B.S. in Management with concentrations in Finance and Information Systems from Boston College.

VENTURE CAPITAL PANEL

Speaker

Ben West

Partner

Juxtapose

Ben is a Partner at Juxtapose on the Concept Development team, where he leads company-creation efforts at the research phase and supports our ventures from inception through their full lifecycle. Ben works closely with the research, design and talent teams, as well as with the firm's portfolio companies on capital markets efforts. Prior to Juxtapose, Ben had a decade of experience in venture capital and company creation, including the creation efforts to launch Strive Health at Oxeon Ventures and Hims at Atomic Labs, as well as a foundational systematic company creation building experience at Accretive. Ben started his career at Boston Consulting Group. He has an MBA from Harvard Business School, where he graduated with Distinction, and a BA from the University of Oklahoma, where he graduated Summa Cum Laude.

VENTURE CAPITAL PANEL

Speaker

Madeline Darcy

Managing Partner

Kaya Ventures

Madeline Darcy is the Managing Partner of Kaya Ventures, an early-stage venture firm focused on expanding access to health. Prior to founding Kaya Ventures, Madeline held investment roles as a General Partner at CircleUp Growth Partners and as a Vice President at Visible Ventures. Previously, Madeline was a management consultant at Oliver Wyman, where she advised Fortune 500s on strategy, growth, and post-merger integration. Madeline began her career in operating roles at Apple and The Walt Disney Company. Madeline is a graduate of The University of Texas at Austin where she graduated with highest honors and earned her MBA from the Harvard Business School.

VENTURE CAPITAL PANEL

Speaker

Ali Mahmoud
Principal
Glasswing Ventures

Ali Mahmoud is a Principal at Glasswing Ventures investing in AI-native applications of software and frontier technology in the enterprise markets. His governance experience includes Observer roles on the Boards FeatureByte, Verusen, Labviva, CloudTruth, Zylotech (acquired by Terminus), and Plannuh (acquired by Planful).

Prior to Glasswing, Ali worked on the investment teams of Morpheus Ventures and Lightbank, focusing on early-stage B2B technologies across a variety of sectors. Prior to venture capital, Ali served as Head of Business Development and founding team member at SixPlus. He built out the sales, marketing, and business development functions. Ali started his career at EY, where he worked with global teams on advisory and financial statement audit engagements for the financial services industry.

Ali graduated summa cum laude from University of Massachusetts Amherst with a BBA in Accounting and holds an MBA from Chicago Booth.

REAL ESTATE PANEL

Moderator

Steve Weikal
Managing Partner
MIT MET Fund

Panelists

Peter Braffman
Managing Director
GCM Grosvenor

Marc Weidner
Managing Director
Franklin Templeton

Sharon Ann M. Miller
CEO,
Head of Portfolio Management
Hillcrest Finance

Yane Hsu
Founder, Principal
Lauralea

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REAL ESTATE PANEL

Steve Weikal

Managing Partner

MIT MET Fund

Moderator

Steve Weikal is a lecturer, researcher, and thought leader focused on innovative new technologies and business models that are reinventing traditional ways of developing, transacting and managing real estate. He is the Industry Chair of the Real Estate Transformation Lab at the MIT Center for Real Estate and is also the Managing Partner of MET Fund II, which invests in early-stage, MIT-connected start-ups focused on solutions for the Built Environment TransitionTM (BET).

Steve is a member of the Global Insights Panel for MIT Technology Review, the CREtech Climate Leadership Board, and the review committee for the CoreNet Global Innovator Awards. He serves on the boards of eight real estate technology companies, and was the Founder of MIT Real Disruption, a successful series of conferences discussing the impact of emerging technology on the real estate industry that is now part of the global CREtech media platform. An enthusiastic industry advocate, Steve speaks extensively about real estate technology for corporate clients around the world and has presented at conferences for AFIRE, AsRES, BOMA, CCIM, CoreNet, CREtech, CREW, ICSC, IREM, NAIOP, PERE, SIOR, and ULI. He has been quoted in numerous media outlets, including BuzzFeed, TechInsider, Medium, USA Today, CP Executive, Harvard Real Estate Review, the Boston Globe, GlobeSt., Travel Weekly, IPE Real Assets Europe and Anuario Inmobiliario LatinoAmerica. Steve holds a Master's of Science in Real Estate Development (MSRED)and Master's in City Planning (MCP) from the Massachusetts Institute of Technology, and a law degree (JD) from Suffolk University Law School.

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REAL ESTATE PANEL

Speaker

Peter Braffman

Managing Director

GCM Grosvenor

Mr. Braffman is a member of the Infrastructure Advantage Investment Committee and the Real Assets Investment Committee at GCM Grosvenor. He leads the firm's real estate practice and is responsible for managing investment activities, product development, and growth. Prior to joining GCM Grosvenor, Mr. Braffman was a Senior Vice President at Zurich Alternative Asset Management, where he was responsible for sourcing, underwriting and executing U.S.-based real estate investments. Prior to joining ZAAM, Mr. Braffman was a Vice President in the Merger and Strategic Advisory Group at Goldman Sachs, where he advised corporate clients on structured real estate acquisitions, monetizations and dispositions. Prior to joining Goldman Sachs, he was an Associate at Kirkland & Ellis LLP, focused on merger, securities and asset-backed law. Mr. Braffman received his Master of Business Administration from Kellogg School of Management, his Juris Doctor from Northwestern University School of Law, and his Bachelor of Arts in Biology and History from the University of Rochester.

REAL ESTATE PANEL

Speaker

Marc Weidner
Managing Director
Franklin Templeton

Marc Weidner joined Franklin Templeton in early 2002 and is a managing director and member of the Global Investment Committee of Franklin Real Asset Advisors. In addition, he is a member of its Management Committee and in this capacity serves as head of investments.

Prior to joining Franklin Templeton, Mr. Weidner worked in the investment banking group of DLJ/Credit Suisse in London and New York where he originated and structured real estate private equity funds in Europe and the United States. Prior to joining DLJ/Credit Suisse, he was with Security Capital Group in London where he worked on various transactions and business development initiatives.

Mr. Weidner holds an M.B.A. from Cornell University where he was a Fulbright scholar. He holds a master's degree in political science and international relations, magna cum laude, and a B.A. in business management, magna cum laude, from Louvain-la-Neuve, Belgium. Mr. Weidner is a member of PREA and INREV, and is a faculty member in the M.S. in Real Estate Development program at Columbia University.

THE 19TH ANNUAL MIT SLOAN INVESTMENT CONFERENCE

REAL ESTATE PANEL

Speaker

Sharon Ann M. Miller

CEO,
Head of Portfolio Management
Hillcrest Finance

Ms. Miller is co-owner, President, Managing Partner, and Head of Portfolio Management of Hillcrest Finance LLC, a New York City-based real estate credit platform. In this capacity, she has oversight of the day-to-day operations of the Firm, as well as portfolio management responsibilities for Hillcrest's investment vehicles.

Ms. Miller has 35 years of experience in the commercial real estate industry. Prior to joining(in 2015) and re-launching (in 2017) Hillcrest, Ms. Miller was Managing Director at Rockwood Capital where she was responsible for business development, product strategy, capital raising, and investor relations.

She is a Counselor of Real Estate®, a member of the Pension Real Estate Association, a member of the WX, Inc. Board of Directors, and a RELPI community member. In addition, Ms. Miller is a member of Impart Media's/Hive Wealth's Board of Directors, The University of Virginia's Architecture School Foundation Board of Directors, The University of Virginia's Center for Real Estate and the Built Environment's Board of Directors, and the Charter School Growth Fund's Structured Finance Committee.

REAL ESTATE PANEL

Speaker

Yane Hsu

Founder, Principal

Lauralea

Ms. Hsu is Founder and Principal of Laurea LLC, a consulting firm that provides strategy, fundraising, and investor relations advisory services to private equity real estate firms. She is a results-oriented investment professional with nearly 25 years of experience in advisory consulting, investment research, and client management.

Prior to founding Laurea LLC in 2016, Ms. Hsu was Vice President and Head of Client Service Analytics at CIM Group responsible for fundraising, investor relations, and due diligence efforts across the firm’s private equity investment platforms. Prior to joining CIM Group, Ms. Hsu was a Director at Cliffwater LLC, an alternative investments consulting firm and led its due diligence and research efforts of private equity real estate managers and investment offerings. Previously, she was a Director at BlackRock responsible for account management and investment strategy for U.S. and Non-U.S. insurance clients and an Associate Director at MetLife’s Investments Department with portfolio management responsibilities.

Ms. Hsu received her Bachelor of Arts degree in Economics from University of California, Los Angeles, Master of Business Administration degree in Finance from the Marshall School of Business at the University of Southern California, and holds the Women in Leadership certificate from Cornell University. She serves on the Board of Directors of the Nevada Trust Company, and the Advisory Boards of Hillcrest Finance LLC and Catalyst Capital Holdings LLC.

GROWTH EQUITY PANEL

Moderator

Caitlin Vorlicek
Principal
Sageview Capital

Panelists

Chris Mitchell
Managing Director
Spectrum Equity

Vaibhav Nalwaya
Founder
Wavecrest Growth Partners

Claude de Jocas
Vice President
Volition Capital

Richard Kandel
Principal
HOF Capital

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GROWTH EQUITY PANEL

Moderator

Caitlin Vorlicek

Principal

Sageview Capital

Caitlin Vorlicek joined Sageview in 2021 and serves as a Principal in the firm's Greenwich office.

Before joining Sageview, Caitlin led the Partnership and Corporate Development efforts at Sifted (fka VeriShip), a logistics software company in Kansas City, MO. Before joining Sifted, Caitlin spent three years at Summit Partners, sourcing and executing investments, including Klaviyo, A Cloud Guru, and Sifted. Caitlin began her career in technology investment banking at Harris Williams & Co.

Caitlin graduated cum laude from Colby College, receiving a B.A. in Economics with distinction.

GROWTH EQUITY PANEL

Speaker

Chris Mitchell

Managing Director

Spectrum Equity

Chris joined the firm in 2001 and is a Managing Director. His areas of investment focus include Internet-enabled information services, software and financial technology. Prior to joining Spectrum, Chris worked at TA Associates and Monitor Clipper Partners. He serves as a Director of Big Brothers Big Sisters of Eastern Massachusetts and is a Charter Trustee of The Roxbury Latin School. Chris received an AB in Classics, cum laude, from Princeton University.

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GROWTH EQUITY PANEL

Vaibhav Nalwaya

Founder
Wavecrest Growth Partners

Speaker

Vaibhav ("V") Nalwaya is a co-founder and Managing Partner at Wavecrest Growth Partners. Vaibhav's prior experience spans across both investing and operating roles in the B2B technology ecosystem.

Vaibhav was an investor at Vista Equity Partners' Foundation Fund, where he focused on growth buyouts in B2B tech. Prior to Vista, he was a Principal at Key Venture Partners, a B2B tech-focused expansion stage capital firm backed by KeyCorp (NYSE: KEY). During his time at Vista and Key, he invested in a variety of high-growth B2B software, telecom and business services companies across multiple industry verticals.

As an operator, Vaibhav served as Managing Director and Chief Financial Officer of Bluewolf, a founder-led, PE-backed high-growth B2B tech firm focused on the Salesforce.com ecosystem where he played an instrumental role in the company's highly successful acquisition by IBM in early 2016. Vaibhav has also served as the Chief Financial Officer of Bullhorn, a founder-led, high-growth cloud CRM software company that was backed by Vista Equity Partners and was ultimately acquired by Insight Partners. He started his business career at Deloitte, where he advised multinational clients on software/ERP strategies.
Vaibhav graduated with an M.S. degree in Chemical Engineering from The University of Michigan at Ann Arbor, and a B.S. degree in Chemical Engineering from the Indian Institute of Technology, New Delhi.

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GROWTH EQUITY PANEL

Speaker

Claude de Jocas

Vice President
Volition Capital

Claude is a Vice President of Volition Capital's Internet and Consumer investment team. She joined Volition in 2019 and focuses on investments in e-commerce and tech-enabled services, with sector interests in digital health, telco, and consumer subscription services. Claude is a board member for Super73, and a board observer for US Mobile, Sensible Care, Burst Oral Care, and Duffl. In addition, she has investment experience with Dragonfly.

Before Volition, she interned during her MBA summer at Bullish, a seed fund that backed direct-to-consumer disruptors, including Peloton, Harry's, Warby Parker, and Casper. Claude holds a BA from Yale University in economics and environmental studies and an MBA from Harvard Business School.

GROWTH EQUITY PANEL

Speaker

Richard Kandel

Principal

HOF Capital

Richard Kandel is a Partner at HOF Capital where he helps lead the firm's growth stage investment strategy. In addition to privates, he oversees the firm's crossover initiatives, supporting portfolio companies as they transition into the public markets.

Before HOF, Richard led growth investments on behalf of several institutions, most recently serving as a Managing Director at Artist Capital. Before that, he was a Vice President at HQ Capital, a $10B+ alternative investment manager. There, he was responsible for secondary deal origination and execution with an emphasis on growth-stage technology companies.

Richard began his career at Thomas Weisel Partners within the firm's technology investment banking and asset management divisions. He graduated from the Kelley School of Business at Indiana University with a B.S. in Finance and is a non-practicing CPA.

FAMILY OFFICE PANEL

Moderator

Bridget Kilroy
Founder, CEO
The Global 51

Panelists

Case Fell
Partner
Third Lake Partners

Matt Hershey
CIO
Marron Capital

Paul Yun
Managing Director,
Co-Head of PE
& VC Direct Investing
Mousse Partners

Ryan Ansin
Principal
Ramagious

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FAMILY OFFICE PANEL

Moderator

Bridget Kilroy

Founder, CEO

The Global 51

As the Chief Executive Officer of The Global 51, a family office club, Bridget leads an exclusive membership group for some of the world's most distinguished, engaged, and philanthropic families. With over 10 years of experience in serving the family office ecosystem globally, she has developed a unique approach to curating highly creative and well-executed experiences that elevate the personal and professional brand of The Global 51's members.

Bridget’s core competencies include capital introductions, strategic business advisory, family business governance, and network building. She has cultivated deep connections within the family office, corporate, and institutional space, and leverages them to facilitate introductions and opportunities that match the needs and goals of The Global 51's members. She is also the founder and managing partner of the NextGen Leaders Network, a not-for-profit organization that educates and develops the next generation of leaders in a social setting. In addition, she is a Milken Institute Young Leader and a member of Nexus Global.

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FAMILY OFFICE PANEL

Case Fell

Partner

Third Lake Partners

Speaker

Case Fell is a Partner of Third Lake. Case is responsible for sourcing, evaluating and executing on Third Lake's external fund investments and partnerships across asset classes. Additionally, Case serves on Third Lake's investment and valuation committees.

Prior to joining Third Lake, Case served as chief investment officer for the New York State Nurses Association Pension Plan & Benefits Fund for 6 years and served on the investment team for over 14 years. As CIO, he was responsible for managing a portfolio of more than $5.5 billion in assets across public and private markets, representing more than 37,000 active and retired nurses.

Case graduated with honors with a BA in Finance from Texas Tech University's Rawls College of Business and has a master's in business administration from the University of North Carolina at Chapel Hill's Kenan-Flagler Business School. Case holds the Chartered Financial Analyst (CFA®), Chartered Alternative Investment Analyst (CAIA®), Certificate in Investment Performance Measurement (CIPM®) designations and CFA Institute Certificate in ESG Investing. He is a member of the CFA Society of Austin, the Allocators Advisory Council with the CAIA Association and a National Board member with the Texas Tech Alumni Association.

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FAMILY OFFICE PANEL

Speaker

Matt Hershey

CIO

Marron Capital

Matt Hershey is the Head of Investments for Marron Capital, a single-family office based in New York, where he leads all aspects of portfolio construction, risk management, and investments across a multi-asset class portfolio. Prior to joining Marron, he was with the YMCA Retirement Fund, a $9B private pension for US YMCA employees, as a member of the Fund's marketables investment team. Prior to the YRF, he was with Abacus and Associates, a single-family office, where he led investment research across public and private assets. He started his career at JP Morgan.

Matt holds a BA in economics from Kenyon College and an MBA with a concentration in finance from New York University's Stern School of Business. He is a CFA charterholder.

FAMILY OFFICE PANEL

Paul Yun

Managing Director,
Co-Head of PE
& VC Direct Investing
Mousse Partners

Speaker

Paul Yun is a Managing Director at Mousse Partners, the investment division of Mousse Investments Limited. Mousse Partners oversees a proprietary global portfolio of alternative investments across a broad range of asset classes. At Mousse, Paul serves as Co-Head of Private Equity & Venture Direct Investments, where he is focused on long-term investment opportunities across various sectors and stages in North America and Europe. He is based in New York.

Prior to joining Mousse Partners in 2017, Paul was an investment professional in the New York office of GIC, the sovereign wealth fund of Singapore. At GIC, Paul was a member of the Direct Investments Group focused on U.S. large-cap leveraged buyouts. Previously, Paul was a member of the investment team at Madison Dearborn Partners, a Chicago-based private equity firm focused on buyout and growth equity investing. Paul began his career at BofA Merrill Lynch, based in New York.

Paul received a Bachelor of Arts from Stanford University and a Master of Business Administration from Harvard Business School.

FAMILY OFFICE PANEL

Ryan Ansin

Principal

Ramagious

Speaker

G. Ryan Ansin is an entrepreneur and early-stage investor focused on using a holistic combination of investments and operations to increase returns and positivity for stakeholders across ecosystems.

After founding, building and leaving the 2021 Inc5000 #4 fastest growing company in the US, RevClinics, he focuses on a new initiative. In contrast to the 15-year run of venture capital obsession, Ryan was enlightened by “ugly business roll-ups”, realizing consistent returns by combining businesses, standardizing logistics, and maintaining a Customer First mentality. Taking a page from an investment thesis within the Ansin family, Ryan has begun investing time and resources into waste-to-value platform companies.

Ansin is an advisor to BryKap Holdings – a women’s fashion company; The Footwear Collective – an effort out of MIT to discover global recycling solutions for footwear; and assists various high net worth communities to convene with greater purpose and intentionality to magnify the impact of their time as individuals and families alike.

In 2021, Ansin joined the founding board of the GK Fund, a Boston-based not-for-profit grantmaking fund to BIPOC businesses in need of catalytic growth.

TECHNOLOGY PANEL

Moderator

David Horne
Partner
Gunderson Dettmer

Panelists

Susan Schofer
Partner
SOSV

Sakib Jamal
Vice President
Crossbeam Venture Partners

John Nelson
Principal
Berkshire Partners

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TECHNOLOGY PANEL

Moderator

David Horne

Partner

Gunderson Dettmer

David has over ten years of experience in the startup and venture capital industry. He has a deep understanding of the challenges and opportunities facedby entrepreneurs and investors in various industries and markets. David brings speed and creative problem-solving to complex legal issues and deals, matching the energy of founders and investors. He leverages his extensive experience representing high-growth companies in financings, IPOs, and M&A transactions, as well as working with well-known venture capital and growth equity funds. Additionally, David actively participates in the Boston startup ecosystem, collaborating with accelerators and incubators such as the Harvard Innovation Lab, Techstars Boston, Greentown Labs, the Roux Institute, CiC, and Venture Lane. He is a graduate of Boston University School of Law and Tufts University.

TECHNOLOGY PANEL

Speaker

Susan Schofer

Partner

SOSV

Susan Schofer is a Partner at SOSV and Chief Science Officer at HAX, the world's premier venture program accelerating early stage hard tech startups. She works with startups via early-stage investment, defining key milestones and go-to-market strategies, and is responsible for scientific oversight to support portfolio companies.

Prior to HAX, Susan served on the leadership team at Modern Meadow as SVP of Business Development, developing innovative, sustainable materials, leading product, partnerships, and go-to-market strategy and execution from ideation through to first commercialization. Before that, Susan spent 10 years in Silicon Valley in roles spanning R&D, product development, product management, and business development for Amyris (pioneer of Synthetic Biology) and Symyx Technologies (automated, robotic workflows to accelerate new material discovery and commercialization). Her passion is working with innovators to bring scientific breakthroughs to market to make a positive impact on people and the planet.

Susan was an NSF Postdoctoral Fellow at Stockholm University, developing artificial photosynthesis. She holds a PhD in chemistry from Caltech and an ScB in chemistry from Brown University.

TECHNOLOGY PANEL

Speaker

Sakib Jamal

Vice President
Crossbeam Venture Partners

Sakib was the first employee at Crossbeam VC, where he represents the firm to over 15 founders as an investor, board observer and/or director. Prior to Crossbeam, he was an investment banking analyst at J.P. Morgan's Industrials group, and received a BSc in Industrial and Labor Relations from Cornell University. He was named on the Forbes 30 under 30 list in 2023.

THE 19TH ANNUAL
MIT SLOAN
INVESTMENT CONFERENCE

TECHNOLOGY PANEL

Speaker

John Nelson

Principal

Berkshire Partners

John Nelson is a Principal and a member of the Technology team at Berkshire Partners. He is currently involved with Berkshire portfolio companies Asurion, Curriculum Associates, and PDQ. Examples of prior Berkshire portfolio company involvement include Coty Inc., Consolidated Precision Products Corp., Husky, Masergy, SRS Distribution, and Telx. John originally joined Berkshire in 2012 as an Associate, and then returned to the firm in 2016 after graduating from business school. Prior to joining Berkshire, John was an associate consultant at Bain & Co. John received a B.A. from the University of Virginia and an M.B.A. from Harvard Business School.