Private Equity International

NEXUS 2024

NEXUS 2024 is set to redefine the LP/GP connection in Orlando on March 6-8

Amid unprecedented macro pressures on fundraising and deals, there's never been a greater need for the private equity industry to come together to drive the asset class forward.

The NEXUS 2024 Summit brings Private Equity International's 20+ years convening experience and connection with private markets to life in Orlando.

No other summit will deliver such a sophisticated agenda with true pioneers of industry steering the conversation and program of tailored networking.

PEI

Jonathan Gray
President and
Chief Operating Officer
Blackstone

Howard Marks
Co-Founder & Co-Chairman
Oaktree Capital Management

David Rubenstein
Co-Founder & Co-Chairman
The Carlyle Group

The NEXUS difference - A speaking faculty like no other

Nowhere else will you get these industry titans in one place, at one time.

From the founders and senior leaders at the biggest fund managers in private equity to the Chief Investment Officers of the largest LPs allocating to the asset class, you will hear from both sides of the LP/GP relationship.

Jonathan Gray
President and Chief Operating Officer
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Oaktree Capital Management

David Rubenstein
Co-Founder & Co-Chairman
The Carlyle Group

Britt Harris
Acting Chief Executive Officer and Chief Operating Officer
Texas Permanent School Fund Corporation

Christopher Ailman
Chief Investment Officer
California State Teachers' Retirement System (CalSTRS)

Lori Hall-Kimm
Senior Managing Director, Head of Global Private Equity
Healthcare of Ontario Pension Plan (HOOPP)

Lamar Taylor
Interim Executive Director & Chief Investment Officer
Florida State Board of Administration

Kim Hourihan
Chief Investment Officer
CBRE Investment Management

The NEXUS difference – A summit built for connections

Built off PEI's 20+ years of experience connecting private equity LPs and GPs, NEXUS will create the ideal networking experience for capital to flow into the asset class. Hosted in the warmth of Florida, the conference will feature superior content and speakers in unique indoor and outdoor settings.

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PEI delivered a well-organized event, balancing between sessions on pertinent topics with industry leaders, as well as ample networking time. Highly recommended.

Marilena Ioannidou
British Business Bank

NEXUS Grand Opening

The Grand Opening will kick off NEXUS surrounded by the breathtaking views of the Grande Lakes outdoor stage. Enjoy a festival of food and drink alongside unmatched speakers, content, and networking. Don't be late!

PEI Group charity golf tournament

Tee off at the Ritz Carlton Golf Course, the same course that hosts the PGA Tour's PNC Championship each year. Test your mettle on the Greg Norman designed course where Tiger Woods, John Daly, Justin Thomas, and the PGA Tour's best battle it out each year.

Sustainable Culinary Experience: 'Garden to Table'

Curated by Executive Chef Bir Yadav, the JW Garden to Table experience begins with a guided tour of the flourishing JW Garden, led by Chef Bir and two of the resort's dedicated Herb Gardeners.

The NEXUS difference - Built off 20+ years convening power

The pre-eminent convening force in private equity

PEI Group is the most respected voice in the industry with the deepest, widest connection to both LP and GP sides of the market. We are bringing 20+ years experience of connecting private equity decision-makers to make sure NEXUS 2024 will help you learn, network, make connections and do better business.

20+ Years of experience convening and informing GPs and LPs

3,000+ US LPs in our database with allocation and strategy data

11,000+ Global organizations rely on PEI Group knowledge and networking each year

100,000+ Private markets decision-makers at our global events in last 5 years

Private Equity International

NEXUS 2024

Deep insight. New opportunities. Focused connections.

NEXUS 2024 is the new home for private equity in North America. Connect with more than 800 of the most influential investors, managers and service providers in the asset class in Orlando on March 6-8, 2024.

The unique agenda is built off *Private Equity International* and PEI Group's deep connection to industry, delivering three days of distinct insight into global private equity markets and tailored networking that you can't get anywhere else.

With 2024 being a pivotal year for private equity – Q1 is the perfect moment to reassess your strategy, focus on connections that will be most productive for portfolio construction, and gather the intel around burgeoning opportunities.

Industry-leading speakers include:

Jonathan Gray, *President and Chief Operating Officer*, **Blackstone**

Orlando Bravo**,** *Co-Founder & Managing Partner*, **Thoma Bravo**

Howard Marks, *Co-Founder & Co-Chairman*, **Oaktree Capital Management**

David Rubenstein, *Co-Founder & Co-Chairman*, **The Carlyle Group**

David Mussafer**,** *Chairman and Managing Partner*, **Advent International**

Christopher Ailman, *Chief Investment Officer*, **California State Teachers' Retirement System (CalSTRS)**

Lamar Taylor, *Interim Executive Director & Chief Investment Officer*, **Florida State Board of Administration**

Jim Momtazee, *Managing Partner*, **Patient Square Capital**

Steven Meier, *Chief Investment Officer and Deputy Comptroller* for **Asset Management New York City Employee Retirement System**

Britt Harris, *Former Chief Executive Officer and Chief Operating Officer*, **Texas Permanent School Fund Corporation**

Jennifer Choi, *Chief Executive Officer*, **Institutional Limited Partners Association (ILPA)**

Bill Kelly, *Chief Executive Officer*, **CAIA**

Sherrese Clarke Soares, *Founder & Chief Executive Officer*, **HarbourView Equity Partners**

Dana Johns, *Head of Private Equity*, **The New Jersey Department of the Treasury's Division of Investment**

PEI

To learn more, visit:
privateequityinternational.com/NEXUS/

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anna.d@pei.group

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Jimmy Kurtovic
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For speaking opportunities:
Jenna Williams
jenna.w@pei.group

Scott Anderson, *Chief Investment Officer*, **North Dakota Retirement and Investment Office**

Chris Eckerman, *Senior Portfolio Manager, Head of Co-Investments*, **State of Wisconsin Investment Board (SWIB)**

Eric Liu**,** *Partner, Head of North American Private Equity, and Co-Head of Global Healthcare,* **EQT**

Eric Lang**,** *Senior Managing Director, Private Market***, Teachers Retirement System of Texas**

Nigel Dawn**,** *Senior Managing Director, Head of Capital Advisory* Group**, Evercore**

Jacob Comer, *Partner***, NovaQuest Capital Partners**

Daniel Goldstein, *President & Chief Executive Officer*, **Folience**

Lori Hall-Kimm, *Senior Managing Director, Head of Global Private Equity*, **Healthcare of Ontario Pension Plan (HOOPP)**

Prasanna Ramaswamy, *Managing Director, Head of Technology & Data***, CPP Investments**

Matthew Liposky, *Chief Investment Operating Officer*, **Massachusetts Pension Reserves Investment Management**

Max Miller, *Managing Director, Growth Equity*, **CPPIB**

Beatrice Mitchell, *Co-Founder & Managing Director*, **Sperry Mitchell & Company Inc.**

Andrew Palmer, *Chief Investment Officer*, **Maryland State Retirement and Pension System**

Kim Hourihan, *Chief Investment Officer*, **CBRE Investment Management**

Michael Chang, *Partner, Private Equity*, **BC Partners**

Hans Kobler, *Founder and Managing Partner*, **Energy Impact Partners**

Anna Barath**,** *Chief Investment Officer***, Bite Investments**

Marcus Felder, *Principal, Portfolio Operations*, **Blackstone**

Mary D'Onofrio, *Partner*, **Bessemer Venture Partners**

Yann Robard, *Managing Partner***, Whitehorse Liquidity Partners**

Tadasu Matsuo, *Managing Director, Head of Global Alternative Investments***, Japan Science & Technology Agency**

Peter Keehn, Senior *Managing Director, Private and Alternative Assets*, **Allstate Investments**

Harj Shoan, *Senior Managing Director, Private Capital,* **Ontario Teachers' Pension Plan (OTPP)**

Paul Sanabria, *Senior Managing Director & Global Co-Head of Secondaries*, **Manulife**

Tarrus Richardson*, Founder & Chief Investment Officer***, IMB Partners**

Robert "Vince" Smith, *Deputy State Investment Officer and Chief Investment Officer,* **New Mexico State Investment Council (NMSIC)**

Mark Steed, *Chief Investment Officer*, **Arizona Public Safety Personnel Retirement System (PSPRS)**

Chris Voss, *Founder and Chief Executive Officer*, **The Black Swan Group**

Pierre-Ettienne Franc, *Chief Executive Officer*, **Hy24**

Todd Abbrecht**,** *Co-Chief Executive Officer*, **Thomas H. Lee Partners**

Venus Phillips, *Managing Director*, **The Kresge Foundation**

Allen Waldrop, *Director of Private Equity*, **Alaska Permanent Fund Corporation**

Lorine Pendleton**,** *Founder & Managing Partner*, **125 Ventures**

Sara Zulkosky, *Co-founder & Managing Partner*, **Recast Capital**

Amol Helekar**,** *General Partner***, TCV**

Robert Blaustein**,** *Partner, Investment Funds Practice Group***, Kirkland & Ellis LLP**

Stephanie Geveda**,** *Founder & Managing Partner***, Coalesce Partners**

Jan Stahlberg**,** *Founder & Managing Partner***, Trill Impact**

Tori Buffery, *Partner*, **Morningside Capital**

Rudina Seseri, *Founder & Managing Partner*, **Glasswing Ventures**

Raelan Lambert, *Senior Partner & Global Alternatives Leader*, **Mercer**

Reuben Munger, *Managing Partner & Chief Investment Officer*, **Vision Ridge**

Joost Bergsma, *Founder and Chief Executive Officer*, **Glennmont Partners from Nuveen**

Elizabeth Weymouth, *Managing Partner*, **Grafine Partners**

Keith Williams, *Managing Partner and Co-Chief Investment Officer*, **Crestline**

Doug Kimmelman, *Founder and Senior Partner*, **ECP**

Isabelle Scemama, *Global Head of Alts*, **AXA IM Alts**

Carl Williams, *Partner and Co-Founder*, **Sandbrook Capital**

Lydia Guett, *Head of Growth*, **Systemiq Capital**

Mark Boyagi, *Partner, Investment Funds Group*, **Kirkland & Ellis LLP**

Agha Khan, *Managing Director and Co-Head of Private Equity*, **Stone Point Capital**

Agenda

March 6-8, 2024 | JW Marriott Orlando, Grande Lakes | Orlando, FL

Wednesday, March 6	
9 am – 12 pm	**Council Meetings (Invite only)**
9 am – 12 pm	**Limited Partners Council** Investor Leadership Council & Workshop with world-leading negotiation expert Chris Voss (LPs only) Exclusively for investors, the peer-to-peer Investor Council will comprise strategy-building roundtables that deep dive into contract negotiation tactics, gaining transparency, and re-analyzing portfolio construction/due diligence approaches to partnerships. **9 am - 10 am** **Workshop: Leading with leverage – The power playbook to gaining the most optimal fund terms** Please join the world's leading negotiator, Chris Voss, on developing the allocators' newfound power within partnerships that can be built on value creation. As allocators aim to transition to a changing fundraising environment, it is essential to focus on building best negotiations for targeted transparency and aligned expectations. Be empowered to gain a deeper understanding of where GPs interests will lie (e.g. in reducing both fund formation costs and length of side letter agreements) and how best to address points of contention for exclusive access to creative fund structures, lower fee rates and preferred decision-making deadlines. **Facilitator:**

	Chris Voss, Founder, Chief Executive Officer, **The Black Swan Group** **10:10 am - 10:55 am** **Keynote Panel: Top of Mind 2024 – Re-Strategizing the portfolio and optimizing due diligence in the market landscape** As we head into closing the first quarter of H1, engage in best practices for analyzing the market and board decision-making as it parlays into considerations for re-strategizing or adjusting portfolio construction around private markets, predominantly Private Equity. Within that landscape, we can further look at the best ways to reassess our management profiles, investment performance and understand the due diligence needed to better onboard and uniquely collaborate in the partnership. We further deep dive on establishing cash flow and where CIO and CIOO can better align to increase transparency and request more from GPs. **Panelists:** **Lamar Taylor**, Interim Executive Director & Chief Investment Board, **Florida State Board of Administration** **Matthew Liposky**, Chief Investment Operating Officer, **Massachusetts Pension Reserves Investment Management (Mass PRIM)** **Vince "Robert" Smith**, Deputy State Investment Officer and Chief Investment Officer**, New Mexico Investment Council** **Scott Anderson**, Chief Investment Officer, **North Dakota Retirement and Investment Office** **11:05 am – 12 pm** **Think tank: The strategic secrets that guide successful portfolio decision-making** Roundtable 1: Determining quantifiable key performance metrics for re-upping decisions, commitment size and shifting capital Roundtable 2: Analyzing the denominator effect and its impact on risk returns and liquidity options Roundtable 3: Investors' reengagement on DPI and ensuring money back from the PE portfolio: successful exit strategies Roundtable 4: Navigating the increased competition for deals in niche sectors Roundtable 5: Culling the portfolio: Determining who stays and who goes Roundtable 6: The new market landscape and evolving DD processes Roundtable 7: Preventing long-term ramifications to fundraising misses
9 am – 12 pm	**The Managing Partner and Founders Council**: The Managing Partner and Founders Council will gather an intimate group of leading managers for their outlook on private equity in 2024, as they assess the opportunities for retailization, and the LP mindset behind capital commitments in this intricate market landscape. **9 am – 9:30 am** **The State of the Market Address** **9:30 am – 10am** **Cross Conversation: The Wealth Channel – The $80trn opportunity:** As retailization of private markets expands investor types drastically, rethink how traditional forms of alignment and the rules for of engagement may change for certain product types. This is a discussion that addresses the broader opportunities for alternatives, RIA's, Family Offices, including packaging and distribution options. **10:10 am – 10:55 am**

	Keynote Panel: The Negotiation Table - What LPs need amid challenging market conditions to secure more transparency, unique fund structures and favorable terms. We address the timing and dynamics at play between LPs, SPs, GPs amidst market shifts. **Eric Lang,** Senior Managing Director, Private Market**, Teachers Retirement System of Texas** **11:05 am – 12 pm** **Think tank: The Year of Capital Planning - Comparing LP & GP Expectations** Looking at the 2024 landscape, reassess existing and new capital commitments during slower exit environments.
12 pm – 1:30 pm	**Women in Private Equity Lunch** An opportunity to network with and learn from the women at the top of private equity. This is an invaluable lunch to establish relationships and build your network before the main event.
12 pm – 1:30 pm	**Lunch in the Citrus Garden**
1:30 pm – 7 pm	**Grand Opening Gala Reception on The Valencia Lawn** **PEI Center Stage**: Hosted by the PEI Group editorial team and guest speakers: **2pm – 2:30pm: Fireside Chat** with **Howard Marks**, Co-Founder and Co-Chairman, **Oaktree Capital Management** **3pm – 3:30pm: Cross Conversation - Innovative views behind employee shared ownership programs** Increased fund performance via shared prosperity? Evaluate dual perspectives on how to successfully implement ESOPS. **Daniel Goldstein**, President and Chief Executive Officer, **Folience** **4pm – 4:30pm: Panel: A New Frontier in the Major Leagues – Sports investing on peak** **5pm - 5:30pm: Panel: The Watch – Identifying success benchmarks for the most innovative emerging managers of 2024** As market conditions make capital deployment more difficult, investors are keeping selective in their search for emerging managers who can diversify their strategy, deal size, and industry specialization. How do our founders recreate the investment playbook for collaborating uniquely and delivering on LP board expectations. **Stephanie Geveda,** Founder and Managing Partner**, Coalesce Partners** **Sherrese Clarke Soares**, Founder and Chief Executive Officer, **HarbourView Equity Partners** **6pm – 6:45pm Fireside Chat** with **Britt Harris**, Acting Chief Investment Officer and Chief Operating Officer, **Texas Permanent School Fund Corporation** **VIP Meet & Greet**: An opportunity to rub shoulders with the next generation of leaders in private equity, including PEI Group's **Top 40 under 40** and **Women of Influence**.

	Networking Lounge & Station: A place to arrange your meetings via the networking app and meet the networking engagement team that can help you build your schedule of meetings and events as you plan your activities for the days ahead. *Also available – charging stations, free-flow food, and beverages will be provided starting at 3 pm.*	
8 pm – 10 pm	**Investor advisory board dinner** (Invite only)	**Private networking dinners** (Private hosts, invite only)
	Have no plans but still want to network? PEI Group will host you for a relaxed evening bite and drink overlooking the lakes.	

Thursday, March 7	
7:15 am	**Early registration & networking** *Meeting rooms open*
7:15 am	**Investor breakfast & workshop: The LPA negotiation – Changing the terms and conditions: Understand the impact in tougher markets**

Fringe Lounges (Open all day) *Spaces to connect, engage, and relax*	
The Board Room (LPs only) A space exclusively for institutional investors to connect with peers to discuss the most pressing pain points and impactful strategies for both professional and portfolio growth. **Join think tanks** organized throughout the day around institution types, investment strategies, and sectors.	**The Editors' Lounge** (Open to all) Join the conversation in PEI Group's editorial suite. Be a part of the interviews, podcasts, and videos broadcast live to the editorial sites.
	Networking Lounge (Open to all) Book a meeting space, connect, work, or charge your phone.

Plenary sessions	
8:00 am	**Chairperson's opening remarks**
8:10 am	**Making the mark: Headlines of 2023 that will shape the 2024 LP-GP Nexus** Hear from the editors on the front lines as PEI Group's team of award-winning private markets journalists and researchers take to the stage, bringing to life the stories that defined private equity in 2023 and giving the exclusive on the issues that will dominate headlines in 2024.
8:40 am	**Keynote Investor Panel: "In-the-know" investors: The five themes impacting allocations in 2024**

	Faced with inflation and higher interest rates, the post-pandemic surge in deal volumes and fundraising is under pressure. Despite a substantial inventory of dry powder, investors are additionally struggling with overallocation challenges, dislocation in asset prices, lower availability, and rising cost of debt. PEI Group's Research Director will dissect the present landscape, drawing on the findings of PEI Group's annual LP survey: Private Equity International LP Perspectives 2024 report, followed by a panel of investors who will add their insight to the findings. **Dan Gunner**, Research Director, **PEI Group** *Followed by an investor panel* **–** **Jennifer Choi**, Chief Executive Officer, **ILPA** **Andrew Palmer**, Chief Investment Officer, **Maryland State Retirement and Pension System**
9:30 am	**Fireside chat: Navigating inflation pressures and high interest rates** **David Rubenstein,** Co-Founder & Co-Chairman**, The Carlyle Group**
10:00 am	**Structured networking & refreshments**
10:30 am	**Fireside chat** with **Orlando Bravo** Co-Founder & Managing Partner**, Thoma Bravo**
11:00 am	**Keynote GP Panel: Executive Insights into the U.S. economy, high growth strategies and transparent partnerships** **Eric Liu,** Partner, Head of North American Private Equity, and Co-Head of Global Healthcare, **EQT**
11:40 am	**Investor panel: The portfolio design work – Is PE delivering the highest level of return for the given risk?** As we develop a better understanding of how extensive the downturn will be for 2024, we will measure where PE compares within the diversification strategy and explore opportunities to generate strong portfolio returns, making a strong case for private equity or diverging away from the asset class. Learn best practices for developing resiliency, mitigating exposure to loss, and testing investment concepts that bridge asset returns and investment values. Moderator: **Bill Kelly,** Chief Executive Officer**, CAIA** Panelists: **Dana Johns**, Head of Private Equity, **The New Jersey Department of the Treasury's Division of Investment** **Lori Hall-Kimm**, Senior Managing Director, Head of Global Private Equity, **Healthcare of Ontario Pension Plan (HOOPP)** **Mark Steed**, Chief Investment Officer, **Arizona Public Safety Personnel Retirement System (PSPRS)** **Harj Shoan**, Senior Managing Director, Private Capital, **Ontario Teachers' Pension Plan (OTPP)**
12:20 pm	**Fireside chat: At the forefront of secondaries innovation** How do we get to $1 trillion in annual secondaries market deal volume? Senior editor Adam Le sits down with secondaries market veteran Yann Robard to discuss what needs to happen for higher turnover of secondhand private markets exposure and assets, as well as the great valuation conundrum. Interviewer:

	Adam Le, Senior Editor, EMEA, **PEI and Secondaries Investor** Interviewee: **Yann Robard**, Managing Partner**, Whitehorse Liquidity Partners**
12:50 pm	**Panel: Revolutionizing engagement with the market: Does AI deserve a seat on the investment board?** In a world that values speed to market and digital prowess, the emergence of generative AI systems, like ChatGPT, will create a paradigm shift that not only enhances our roles, but may intelligently spearhead our investment decisions. Considering the pervasiveness of this disruption, we will explore how best to assess AI's increasingly expansive significance, where it interfaces, how to take advantage of the rapidly changing landscape, and the ramifications of adopting AI into investment decision-making processes. **Prasanna Ramaswamy**, Managing Director, Head of Technology & Data**, CPP Investments**
1:30 pm - 2:30 pm	**Networking lunch**
2:30 pm	Private Equity International **The Big Themes in Private Markets** **Chaired by**: **Graham Bippart**, Editor, **Private Funds CFO & Private Equity International**
2:40 pm	**Cross Conversation: Coaching up and expanding the tenets for actionable DEI – Aligning expectations with empowerment** **Tarrus Richardson,** Founder and CEO**, IMB Partners** **Marcus Felder**, Principal, Portfolio Operations, **Blackstone**
3:20 pm	**Investor Panel: The Big Picture - Constructing the Alternatives Portfolio** Hear from the nation's leading Heads of Alternatives as we dive into how allocations in private assets investing are being considered – we will additionally review relative value assessments, liquidity planning and portfolio monitoring. **Panelists:** **Raelan Lambert**, Senior Partner and Global Alternatives Leader, **Mercer** **Venus Phillips**, Managing Director, **The Kresge Foundation** **Peter Keehn**, Senior Managing Director, Private and Alternative Assets, **Allstate Investments**
4:10 pm	**Fireside chat: What does "transparency and value creation" mean to LPs and how can GPs deliver it innovatively?**
4:50 pm	**Panel: Cueing up co-investments – Advantages and pitfalls** Determine the availability for co-investments as GPs raise bigger funds. **Panelists:** **Chris Eckerman**, Senior Portfolio Manager, Head of Co-Investments, **State of Wisconsin Investment Board** **Allen Waldrop**, Director of Private Equity, **Alaska Permanent Fund Corporation** **Todd Abbrecht**, Co-Chief Executive Officer**, Thomas H. Lee Partners**

	Secondaries Investor	Buyouts	PE Hub
	Secondaries Chaired by: **Adam Le,** Senior Editor, EMEA, **Private Equity International & Secondaries Investor**	**Emerging managers & sector specialists** Chaired by**: Chris Witkowsky**, Editor**, Buyouts**	**Dealmaking in 2024** Chaired by**: Mary Kathleen (MK) Flynn,** Editor-in-Chief**, PE Hub & PE Hub Europe**
2:30 pm	**Keynote panel: The state of play for GP-led secondaries** Optionality for investors or an unnecessary conflict of interest? **Paul Sanabria**, Senior Managing Director & Global Co-Head of Secondaries, **Manulife**	**Panel Part 2: The Watch – Identifying success benchmarks for the most innovative emerging managers of 2024** As market conditions make capital deployment more difficult, investors are keeping selective in their search for emerging managers who can diversify their strategy, deal size, and industry specialization. How do our emerging managers recreate the investment playbook for collaborating uniquely and delivering on LP board expectations. **Sherrese Clarke Soares**, Founder and Chief Executive Officer, **HarbourView Equity Partners** **Stephanie Geveda**, Founder and Managing Partner, **Coalesce Partners** **Elizabeth Weymouth**, Managing Partner, **Grafine Partners**	**Interactive panel: The dealmaking sweet spot – Life in the lower middle market** Deep dive into where to find the most compelling returns and flexibility in exit plans, sale drivers, and sectors ripe for dealmaking. **Beatrice Mitchell**, Co-Founder & Managing Director, **Sperry, Mitchell & Company Inc.**
3pm	**Transition between tracks**		

3:10 pm	**Fireside Chat: The risk-return spectrum – Benchmarking secondaries in a more impactful way** Learn how the maturation of the market will engender a more nuanced way to benchmark risks/rewards for institutional investors. **Nigel Dawn,** Senior Managing Director, Head of Capital Advisory Group**, Evercore**	**Keynote fireside chat: Explore the biggest opportunities in the healthcare sector** *with* **Jim Momtazee**, Managing Partner, **Patient Square Capital**	**Keynote panel: The key to succeed – Upgrading the sourcing model** Top producing firms will contextualize their sourcing process and how it has evolved since Covid and their battle plan for securing new deals in this competitive landscape, including the use of generative AI. Panelists: **Agha Khan**, Managing Director and Co-head of Private Equity, **Stone Point Capital** **Kim Hourihan,** Chief Investment Officer, **CBRE Investment Management**
3:40 pm	**Networking & refreshments**		
4:10 pm	**Panel: Are continuation funds on the path to continual growth?** What does the growth of continuation vehicles mean for investors, and how will they back them in the long term? What steps can LPs take to help decide whether to roll or sell when faced with continuation funds? Moderator: **Mark Boyagi,** Partner, Investment Funds Group**, Kirkland & Ellis LLP** Panelists: **Tori Buffery**, Partner, **Morningside Capital**	**Panel: The competitive advantage - Broadening diversification for best in class emerging manager programs** Learn successful, yet unconventional strategies to forming a diverse manager program that can identify and access firms with the most attractive investment returns of their generation. Further, understand what it takes to create a lucrative open-door policy for partnerships that have exceptional potential. Moderator: **Carl Williams**, Partner and Co-Founder**, Sandbrook Capital**	**Panel: Rethinking operating models to innovate, value create and fuel top line growth** PE firms have turned inward to focus on getting the most out of portfolio companies. Explore the optimal strategies for • Determining LP needs • Driving powerful operations and growing the portfolio organically (Add-ons considered) • Maximizing capital efficiencies via technology value creation

4:40 pm	**Transition between tracks**

4:50 pm	**Interactive roundtables** **Roundtable 1**: Enhancing returns via co-investments in the secondaries space **Roundtable 2**: LP-led secondaries **Roundtable 3**: Investor views on continuation funds and GP-led deals	**Fund Formation and performance deep dive panel:** Fund formation and real value creation for LPs- Establishing the unique terms for delivering on outperformance in operating partners and sector specialists. Moderator: **Robert Blaustein,** Partner, Investment Funds Practice Group**, Kirkland & Ellis LLP** Panelists: **Jacob Comer**, Partner**, NovaQuest Capital Partners**	**Co-Investment Case Study: BC Partners Takes the Long-Term View on PetSmart** With many exit routes blocked – most notably the IPO path – private equity firms are turning to other PE firms for help in growing big businesses. BC Partners discusses their co-investment with Apollo Global Management to take a minority stake in PetSmart, a business BC bought in a take-private deal back in 2015. **Michael Chang**, Partner, Private Equity, **BC Partners**
5:3 pm – 7:30 pm	**Evening cocktails and The Secondaries Investor 10-year anniversary dinner: Da Vinci Lawn at Ritz Carlton** **Guest of Honor and Keynote: Jonathan Gray,** President and Chief Operating Officer**, Blackstone**		

Friday, March 8	
7:45 am	**LP-only breakfast hosted by ILPA** Join ILPA over breakfast for an update on current initiatives, followed by a roundtable discussion focusing on the latest trends facing global LPs. Share your experiences and hear from the community.
8 am	**Meeting rooms open**
8 am	**Investor/GP breakfast & workshop: The key return differentiator – Enhancing portfolio performance during the holding period**
8 am	**International Women's Day Breakfast** *hosted by* **PEWIN**
8 am	**Nature walk/wellness breakfast in the spa**

Fringe Lounges (Open all day)
Spaces to connect, engage, and relax

The Board Room (LPs only) A space exclusively for institutional investors to connect with peers to discuss the most pressing pain points and impactful strategies for both professional and portfolio growth. **Join think tanks** organized throughout the day around institution types, investment strategies, and sectors.	**The Editors' Lounge** (Open to all) Join the conversation in PEI Group's editorial suite. Be a part of the interviews, podcasts, and videos broadcast live to the editorial sites. **Networking Lounge** (Open to all) Book a meeting space, connect, work, or charge your phone.

8:50 am	**Chairperson's opening remarks**
9 am	**Keynote fireside chat** with **Steven Meier**, Chief Investment Officer and Deputy Comptroller for Asset Management, **New York City Employee Retirement System**
9:30 am	**Regulatory keynote: Navigating the regulatory environment ahead** In discussing their new proposals and policy implications, the SEC will break down what practical impacts the Private Fund Advisor will have on LPs and GPs. We aim to support a constructive re-evaluation of LP/GP sources of disconnect and aid both partners in collaborative efforts to address conflicts of interest.
9:30 am	**Transition between sessions**
10:10 am	Private Equity International **Global markets** **Chaired by: Craig McGlashan,** Editor**, PE Hub Europe**
10:40 am	**GP: Keynote fireside chat** with **David Mussafer,** Chairman and Managing Partner**, Advent International**
10:50 am	**LP Keynote fireside chat: Emerging powerhouses as interest in China wanes – India and Africa** Explore a more nuanced look at each of the greatest emerging market opportunities **Christopher Ailman**, Chief Investment Officer, **California State Teachers' Retirement System (CalSTRS)**
11:30 am	**Panel: Delivering true alpha across the globe** Can institutions still expand far beyond their borders, or is the era of globalization over – and what does that mean for investment strategies? **Tadasu Matsuo,** Managing Director, Head of Global Alternative Investments**, Japan Science & Technology Agency**

	Anna Barath, Chief Investment Officer**, Bite Investments**		
12:10 pm	**Fireside Chat: The 2025 economic outlook – A geopolitical focus to planning both investments and divestments** Gain real-time insights into what the economic recovery might look like and where the opportunities exist to sustainably diversify your portfolio/pursue exits and liquidity events. **Isabelle Scemama,** Global Head, Alts**, AXA IM Alts**		
	New Private Markets **ESG & Impact Investing** Chaired by**: Toby Mitchenall,** Senior Editor, ESG & Sustainability, **New Private Markets**	**Venture Capital Journal** **Venture Capital** Chaired by: **Lawrence Aragon,** West Coast Bureau Chief & Editor, **Venture Capital Journal**	**Private Debt Investor** **Private credit** Chaired by**: Andy Thomson,** Senior Editor, **Private Debt Investor**
10:10 am	**Founders Panel: Private Equity's role in the energy transition** Asset owners are under pressure to position their portfolios for the energy transition and capture upside from arguably the largest economic shift since the industrial revolution. But while the scale of the investment opportunity is vast, the level of uncertainty, as well as technological, political and regulatory risk, is daunting. We speak with founders of established leading private markets firms, whose strategies are driving change in global energy markets, to find out where they believe most attractive risk-adjusted returns can be earned. Panelists: **Joost Bergsma**, Founder and Chief Executive Officer, **Glennmont Partners from Nuveen**	**Panel: The improved VC playbook – Expanding the pillars of innovation** Take a more integrative approach to expanding your VC program and executing on the new standards that support innovation. Understand what it takes to re-evaluate the portfolio in this environment. Panelists: **Sara Zulkosky**, Co-founder and Managing Partner, **Recast Capital** **Max Miller**, Managing Director, Growth Equity, **CPPIB** **Rudina Seseri**, Founder and Managing Partner, **Glasswing Ventures**	**Panel: Key trends shaping the future of private debt** Private debt appears better positioned and compared with other asset classes, with robust fundraising and strong returns, despite a challenging climate. Further explore the tech frontier and the growth of data analytics/technology models for quality of credit scoring, financial disclosures, liquidity management analytics. **Keith Williams**, Managing Partner & Co-Chief Investment Officer, **Crestline**

	Hans Kobler, Founder and Managing Partner, **Energy Impact Partners** **Pierre-Ettienne Franc**, Chief Executive Officer, **Hy24** **Doug Kimmelman,** Founder and Senior Partner**, ECP**		
10:40 am	**Transition between tracks**		
10:50 am	**ESG Experts: Organizing the defense – The future of sustainable investing and fiduciary duty** Is the ESG backlash significantly changing how we invest, or is it just political histrionics? What is driving sustainable capitalism? We speak to ESG leaders about how their organisations view anti-ESG rhetoric and whether they are adapting the way they execute their ESG programmes or how they communicate them.	**Panel: Right time, right price – a strong VC appetite for landmark year 2024** Considering investors are already in early stage investing and with no signs of abating, determine the best approaches to the vintage years. **Mary D'Onofrio**, Partner, **Bessemer Venture Partners** **Lydia Guett,** Head of Growth**, Systemiq Capital**	**Keynote debate: Void or vintage years – Weighing risk considerations against booming opportunities for private credit** Are we optimistic about private credit's potential for promising yields, or is the fundraising slowdown tempering the present excitement? Moreover, to what extent are investors being exposed to risks due to under-regulation and lack of transparency.
11:20 am	**Transition between tracks**		
11:30 am	**The Future of Impact Investing** Impact investing has come a long way in a short space of time, with substantial private markets funds being deployed and starting to generate returns for LPs. What do limited partners look for in a leading edge impact fund, where do they fit into a portfolio and what is best practice when it comes to managing impact alongside financial returns? **Reuben Munger**, Managing Partner and Chief Investment Officer, **Vision Ridge**	**Keynote fireside chat** with **Lorine Pendleton,** Founder & Managing Partner, **125 Ventures**	**Working groups: Dissecting the private credit landscape** Deep dive into emerging investment strategies across the direct lending capital structure. Assess the "opportunity to risk" ratio for the following strategies: **Roundtable 1**: CLOs **Roundtable 2**: Asset-backed loans **Roundtable 3**: Venture debts **Roundtable 4**: Private debt secondaries

	Jan Stahlberg, Founder & Managing Partner, **Trill Impact**		
12 pm	**Transition between tracks**		
12:10 pm	**LP sustainability bugbears –How (not to) pitch a sustainability strategy** LPs are asking tougher questions and demanding more sophisticated answers. And high-quality management of ESG issues is fast-becoming table-stakes for private equity firms. Impact investing strategies, meanwhile, are shooting up LP wish lists. So how does a GP persuade an LP that it has the right sustainability credentials? What should they say – and more importantly what should they not say – to make sure they are on the same page as the LP across the table. Jacob Comer, *Partner*, **NovaQuest Capital Partners**	**Dual perspective case study: Accelerate growth at all costs** With new debt and capital becoming scarce amidst a declining valuation environment, discover if now is the time for growth equity to shine and compare performance across strategies. **Amol Helekar,** General Partner**, TCV** **Allen Waldrop**, Director of Private Equity, **Alaska Permanent Fund Corporation**	**Case study: NAV loans on the rise** With capital becoming scarcer and costs of debt increasing, assess how GPs are adapting through NAV loans to deliver liquidity back to LPs or reinvest back into a portfolio.
12:45 pm - 5pm	Refreshments and depart for activities or join interactive brainstorming sessions over lunch 1. Empowering team retention & creative investment assessments 2. Future-proofing your asset allocations for best-in-class portfolio construction 3. Negotiating for Transparency and Value Creation 4. Going beyond leveraged buyouts to create a thriving business 5. DE&I benchmarks for high-yield investment teams and partners 6. Checks and balances: Creating cohesion with advisory committee & board stakeholders 7. Addressing challenges to the legacy: New-gen plans for SRI and ESG 8. Succession planning: Investing in leadership continuity 9. Top-rated benchmarks for identifying promising emerging managers 10. Structuring co-investments for greater transparency, control, and higher return potential		