

Agenda

2024 CAIS Summit

October 14 – 17, 2024

2024

CAIS Summit

[Event Details](#)

Monday, October 14, 2024

- 1:00 pm – 6:00 pm [Registration Open](#) | The Beverly Hilton Lobby
- 5:00 pm – 6:30 pm [Welcome Reception](#) | Espelette at the Waldorf Astoria Beverly Hills

Tuesday, October 15, 2024

- 7:30 am – 6:00 pm [Registration Open](#) | The Beverly Hilton Lobby
- 8:00 am – 8:45 am [Networking Breakfast and CAIS Lab Demo: Explore Funds on the CAIS Marketplace](#)
International Ballroom and CAIS Lab
- 8:45 am – 9:30 am [General Session](#) | International Ballroom
CAIS Summit Welcome - Unlocking the World of Alts
Matt Brown | Founder and CEO, CAIS
- 9:30 am – 10:30 am [General Session](#) | International Ballroom
Geopolitical Perspectives: State of the World on the Cusp of an Election
Moderator: Jennifer Prosek | Managing Partner Prosek Partners
Mike Pompeo | 70th U.S. Secretary of State and former Director of the Central Intelligence Agency
Leon Panetta | U.S. Secretary of Defense (2011-2013), Director of the Central Intelligence Agency (2009-2011)
- 10:30 am – 11:15 am [General Session](#) | International Ballroom
A Conversation With Apollo CEO Marc Rowan
Moderator: Sonali Basak | Global Finance Correspondent, Bloomberg News
Marc Rowan | Co-Founder and CEO, Apollo Global Management, Inc.
- 11:15 am – 11:45 am [Networking Break and CAIS Lab Demo: CAIS Compass Portfolio Construction Tool and Model Portfolio Platform](#) | International Ballroom and CAIS Lab
- 11:45 am – 12:15 pm [CAIS Talks 1](#)
Outlook for Public and Private Markets | Wilshire Garden
Torsten Slok | Partner, Chief Economist, Apollo Global Management
- Seizing Opportunities Within US Commercial Real Estate | Wilshire Ballroom
Moderator: Tyler VanZandt | Senior Vice President, CAIS
Rama Kaza | Vice President, Portfolio Oversight, CIM Group
Michael Winston | Partner and Managing Director, Related Fund Management
- The Role of GP Stakes in a Portfolio | Beverly Hills Ballroom
Michael Rees | Co-President, Blue Owl Capital
- Evolving Opportunities in Private Credit | California Terrace
Grady Frank | Partner and Head of Private Credit Origination, GoldenTree Asset Management
Claudio Macchetto | Managing Director, GoldenTree Asset Management

12:30 pm – 1:00 pm

CAIS Talks 2

The Future of Private Credit | Wilshire Garden

Moderator: Nickolaus Darsh | Managing Director, Ultimus Fund Solutions**Colbert Cannon** | Managing Director, HPS**Josh Swidler** | Managing Director, Co-CIO Credit, Reverence Capital Partners

Movies, Music, and More: Investing in Premium Intellectual Property | Wilshire Ballroom

Moderator: Maneet Ahuja | Editor-at-Large, Forbes**Neil Blundell** | Head of Investments, CAIS**Todd Boehly** | Chairman and CEO, Eldridge Industries**Jeff Wilbur** | Principal, Eldridge Industries

Vista on Scaling Software Businesses in the Private Markets | Beverly Hills Ballroom

Moderator: Carleton English | Senior Vice President, Prosek**Greg Galligan** | Senior Managing Director, Vista Credit Partners**Martin Taylor** | Senior Managing Director, Co-Head of Foundation Fund, Vista Equity Partners

Diversifying Benefits of Securitized Credit and Real Estate Debt | California Terrace

Moderator: Andrew Good | Vice President, CAIS**Matthew Weinstein** | Partner, Co-Chief Investment Officer, Axonic Capital**Keerthi Raghavan** | Partner and Head of ABS Strategies, Waterfall Asset Management

1:00 pm – 1:45 pm

Networking Lunch and CAIS Lab Demo: Latest CAIS Tech Enhancements Across Funds and Notes | International Ballroom and CAIS Lab

2:00 pm – 2:30 pm

CAIS Talks 3

Private Credit: Generating Income Today and What Lies Ahead | Wilshire Garden

Moderator: Anya Coverman | President and CEO, Institute for Portfolio Alternatives**David Gaito** | Head of Direct Lending, Fidelity**Eric Muller** | Portfolio Manager and Partner, Chief Executive Officer – BDCs, Oak Hill Advisors

Private Equity Investing in a “Higher-for-Longer” World | Wilshire Ballroom

Moderator: Schon Williams | Alternatives Investment Director – Private Equity, Mercer**Jackie Peradotto** | Principal, HarbourVest**David Morse** | Managing Director, Global Co-Head of Private Equity Co-Investments, Neuberger Berman

Alternative Investments 2.0: Implementation Within Private Wealth Portfolios | Beverly Hills Ballroom

Moderator: Marco Della Torre | CEO, Venn by Two Sigma**Brendan McCurdy** | Managing Director, Co-Head Financial Advisor Solutions, Ares Wealth Management**Jill Jensen** | Managing Director, Alternative Investments Business Development, Nuveen

Taking Advantage of Tax-Advantaged Real Estate Strategies | California Terrace

Moderator: Ivan Rella | Vice President, CAIS**Keith Lampi** | Chief Executive Officer and President, Inland Investments**David Scherer** | Co-Chief Executive Officer, Origin Investments

2:45 pm – 3:15 pm

CAIS Talks 4

Exploring Capital Market Alternatives: Structured Notes and Beyond | Wilshire Garden

Moderator: Jason Sforza | Director, Head of West Region for CAIS Structured Investments, CAIS**Kevin Geiger** | Director, Bank of America**Lou Mandia** | Head of RIA Strategy and Distribution, Morgan Stanley**Ana Guiu** | Executive Director, Head of Broker Dealer Distribution, UBS

Building With Alternatives: Frameworks for Private Wealth | Wilshire Ballroom

Moderator: Benjamin Bingham, Vice President, West Coast Alternative Investment Product Strategist, Fidelity Investments**Michael Remigino**, Senior Managing Director, Head of Private Client Group, Graham Capital Management**Nicole Parker**, Managing Director, Pantheon

CAIS Talks 4
(Continued)

The Upcoming Golden Era for Global Opportunistic Real Estate? | Beverly Hills Ballroom

Eric Epstein, Vice Chairman, Davidson Kempner Capital Management

Josh Morris, Partner, Head of Global Real Estate, Davidson Kempner Capital Management

The Innovation Economy: What's Next and How Will Venture Capital Respond? | California Terrace

John Wuestling | Partner, StepStone Group

3:30 pm – 4:30 pm

General Session | International Ballroom

Charting the Uncharted: Alternative Assets in a Rapidly Changing World

Moderator: Scott Wapner | Host of the "Halftime Report", CNBC

Doug Ostrover | Co-CEO, Blue Owl Capital, Inc.

Jenny Johnson | President and CEO, Franklin Templeton

Robert F. Smith | Founder, Chairman, and CEO, Vista Equity Partners

4:30 pm – 5:00 pm

General Session | International Ballroom

State of Artificial Intelligence

Robert F. Smith | Founder, Chairman and CEO, Vista Equity Partners

5:00 pm – 6:00 pm

General Session | International Ballroom

Locknote featuring Jason Sudeikis

Moderator: Kara Nortman | Managing Partner and Co-Founder, Monarch Collective

Jason Sudeikis | Award-Winning Actor, Comedian, Producer, and Writer

6:00 pm – 7:30 pm

CAIS Summit Reception | The Oasis Courtyard

7:30 pm

Manager-Hosted Dinners | Departures From the Beverly Hilton Lobby and the Beverly Wilshire Exit

Wednesday, October 16, 2024

8:15 am – 9:30 am

Breakfast Roundtables and CAIS Lab Demo: Discover Notes With CAIS Structured Investments | International Ballroom and CAIS Lab

9:30 am – 10:15 am

General Session | International Ballroom

Scoring Big: The New Frontier of Investing in Sports

Moderator: Joe Lemire, Senior Writer, Sports Business Journal

Kara Nortman, Managing Partner, Monarch Collective and Co-Founder, Angel City Football Club

Todd Boehly, Co-Founder, Chairman, and CEO, Eldridge Industries; Chairman and Owner, Chelsea Football Club;

An owner of the LA Dodgers, LA Lakers, LA Sparks, and Cloud9

Ian Charles, Co-Founder and Co-Managing Partner, Arctos Partners

10:15 am – 10:45 am

Networking Break and CAIS Lab Demo: How Model Portfolios Can Support Your Alts Journey | International Ballroom and CAIS Lab

10:45 am – 11:15 am

CAIS Talks 5

Investing in US Real Estate in a Declining Interest Rate Environment | Wilshire Garden

Moderator: Richard Talley, Senior Vice President Business Development, UMB

Chase Boulding, Managing Director and INREIT Portfolio Manager, Invesco

Matt Tucker, Senior Managing Director, Bridge Investment Group

New Vehicles Driving the Evolution of Access | Wilshire Ballroom

Amber Murphy, Vice President, Global Markets Division, Goldman Sachs Custody

Marah Marshall, Head of Global Private Wealth Partnerships and Strategy, EQT Partners

Doug Krupa, Managing Director and Head of Global Wealth Solutions, Americas, KKR

CAIS Talks 5
(Continued)

Private Credit: The Dynamic Duo of Income and Diversification | Beverly Hills Ballroom
Ted Koenig | Chairman and CEO, Monroe Capital LLC

Benefits of Secondary Specialization With ICG | California Terrace

Moderator: Ned Mulcahy | Managing Director, ICG

Rob Campbell | Head of Americas, Strategic Equity, ICG

Ryan Levitt | Head of Americas, LP Secondaries and Portfolio Manager Core Private Equity, ICG

11:30 am – 12:00 pm **CAIS Talks 6**

The Big Energy Debate: What's the Opportunity for Fossil Fuels? | Wilshire Garden

Danny Weingeist | Managing Partner, Kayne Anderson

Key Considerations for Private Equity Secondary Investors | Wilshire Ballroom

Scott Connors | President and Managing Director, FlowStone Partners

Michael Carrano | Managing Director and Investment Committee Member, FlowStone Partners

Optimizing Equity: Balancing Public-Private Allocations | Beverly Hills Ballroom

Viral Patel | CEO of Blackstone Private Equity Strategies (BXPE), Blackstone

Inside View: The State of Private Equity | California Terrace

Stephen Brennan | Managing Director and Head of Private Wealth Solutions, Hamilton Lane

12:00 pm – 1:45pm **General Session Over Lunch** | International Ballroom

12:00 pm – 12:45 pm **Lunch Service**

12:45 pm – 1:45 pm **Private Equity Transforming Wealth Management**

Moderator: Bill Nook | Global Head of Asset and Wealth Management, Moelis & Company

Milton Berlinski | Co-Founder and Managing Partner, Reverence Capital Partners

Mike Hollander | Managing Director, GTCR

David Winokur | Partner, Clayton Dubilier and Rice (CD&R)

1:45 pm – 2:00 pm **Networking Break and CAIS Lab Demo:
Your Own Ideas on the CAIS Platform With CAIS Solutions** | International Ballroom and CAIS Lab

2:00 pm – 2:30 pm **CAIS Talks 7**

Deconstructing Structured Notes: Common Myths, Market Insights, and Portfolio Strategies | Wilshire Garden

Moderator: Todd Rosman | Director, Head of Central Region for CAIS Structured Investments, CAIS

Todd Harris | Director, Barclays

Craig Gates | Vice President, JP Morgan

Matthew Swingle | Director, RBC

David Myakotnikov | Portfolio Manager, Mariner

Seeking to Unlock Attractive Yields in Credit Markets | Wilshire Ballroom

Miguel Sosa | Client Portfolio Manager, Head of Market Research & Strategy, Bluerock

Philip Braner | Managing Director, Chief Operating Officer, WhiteStar Asset Management

Neil Desai | Managing Director, Head of Structured Credit, WhiteStar Asset Management

Implementing the Private Equity Toolkit: Primaries, Secondaries, and Co-Investments | Beverly Hills Ballroom

Moderator: Nadia Damouni | Partner at Prosek Partners

Dan Cahill | CEO, Constitution Capital Partners

Stephen Carlson | Managing Director, SCS Investment Partners

Commercial Real Estate Is Struggling: Why That Makes It an Attractive Investment | California Terrace

Richard Byrne | President, Benefit Street Partners

- 2:45 pm – 3:15 pm** **CAIS Talks 8**
 Private Credit and Cross-Platform Investing | Wilshire Garden
Justin Plouffe | Deputy Chief Investment Officer for Global Credit, Carlyle Global Wealth
- Time, Money, Liability (TML): The Case for Evergreen Solutions | Wilshire Ballroom
Robert Collins | Partner, Co-Head Private Wealth, Senior Member of Management, Partners Group
- The Rise of Interval Funds: Expanding to New Alternative Asset Classes | Beverly Hills Ballroom
Moderator: Marc Premseelaar | Senior Managing Director, Structured Investments, CAIS
Dean Zayed | CEO, Founder, Brookstone
Miguel Sosa | Client Portfolio Manager, Head of Market Research & Strategy, Bluerock
- Infrastructure Deep Dive: Thematic Investing in Digitalization, Decarbonization, and Logistics | California Terrace
Luke Taylor | Co-President, Stonepeak
- 3:15 pm – 3:45 pm** **Networking Break and CAIS Lab Demo: How the CAIS Asset Manager Experience Optimizes Your Distribution Efforts** | International Ballroom and CAIS Lab
- 3:45 pm – 4:45 pm** **General Session** | International Ballroom
 The Future of Independent Wealth: Trends, Competition, and Differentiation
Moderator: Carleton English | Senior Vice President, Prosek Partners
Marty Bicknell | CEO and President, Mariner
Mike Durbin | CEO, Cetera
Michael Nathanson | CEO, Focus Financial Partners
Liz Nesvold | Chair, Emigrant Partners
- 4:45 pm – 6:45 pm** **General Session** | International Ballroom
- 4:45 pm – 5:45 pm** Playing to Win: A Conversation with Serena Williams
Moderator: Jennifer Prosek | Prosek Partners
Serena Williams | 23x Grand Slam Champion; Managing Founder, Serena Ventures
- 5:45 pm – 6:45 pm** The Evolution of Storytelling: Kevin Costner on Media, Movies, and What's Next
Moderator: Matt Brown | Founder and CEO, CAIS
Kevin Costner | Actor, Producer, and Director
- 7:00 pm – 10:30 pm** **CAIS at Night** | The Rooftop by JG and Espelette at the Waldorf Astoria Beverly Hills

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The CAIS Summit is happy to welcome the following premier independent advisors and broker-dealers to our third annual event.

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