TALKING HEDGE

Emerging Managers & Diversity: What No One is Talking About—Yet

March 30, 2017 | The Conference Center, UBS Tower

CONFERENCE GUIDE

CONFERENCE SPONSORS

Deloitte.

citi

LOMAS

MartoCapital

MÉRIDA CAPITAL PARTNERS
Investing in the Foundation of the Cannabis Industry

OASIS
Strategic Investment Solutions

BOREALIS
STRATEGIC CAPITAL PARTNERS, LLC

PAAMCO

PINE STREET
ALTERNATIVE ASSET MANAGEMENT

PROGRESS INVESTMENT
MANAGEMENT COMPANY

PRIME ALPHA
Changing the way
investors and managers connect

Rock Creek

MEREDITH JONES
WOMEN OF THE STREET
WHY FEMALE MONEY MANAGERS GENERATE HIGHER RETURNS (AND HOW YOU CAN TOO)

ACCORDO

Charles Skorina & Company
• RETAINED EXECUTIVE SEARCH •
Serving Boards/Leaders
of Institutional Asset Managers

DIVINE
CAPITAL MARKETS

STRATEGIC COMPLIANCE SOLUTIONS

100 Women in Finance

CAIA ASSOCIATION

14th ANNUAL
ConsortiumEAST
Connecting Institutional Investors, Emerging + Diverse Managers POWERED BY RG+ASSOCIATES
June 14-15, 2017 | Intercontinental New York Times Square

Emerging Manager Monthly

the|hedgefund|journal

profit loss

TALKING HEDGE

Welcome to the delegation of ***Emerging Managers & Diversity: What No One is Talking About—Yet***. We are delighted you can join us and confident that you will receive a solid return on your investment in this event. Our sincere appreciation to all of our sponsors for recognizing the value of this forum and collaborating with us to ensure its success.

We formed Talking Hedge to bring together the best minds in alternative investing—allocators, managers and solutions providers—to have open and candid discussions about the challenges each group faces. Our events are designed specifically to give you time to talk and time to meet in a meaningful way. Our goal is for you to walk away with the information you need to meet the challenges of tomorrow.

We would also like to thank our stellar speaking faculty for taking the time to develop thoughtful and thought-provoking sessions that will provide much to discuss over coffee and cocktails.

We look forward to a constructive day of conversation and networking!

Kind regards,

Kristin Fox Co-founder	Meg Bode Co-founder

CONFERENCE PROGRAM

March 30, 2017

8:00-8:30 **Breakfast & Registration**

8:30-9:45 **Investor/Manager Sessions**

Investor Peer-to-Peer Moderated Networking

Facilitator: Terri Engleman Rhoads
President & Managing Partner, Kettera Strategies

Manager Workshop:
Achieving Perfect Pitch: An interactive workshop designed to help emerging managers develop the pitch investors want to hear.

Presenter: Jane Abitanta
Founder, Perceval Associates

9:45-10:00 **Welcome Remarks**

Kristin Fox
Partner, Talking Hedge

10:00-10:45 **Can Investors Be Diversified Without Diversity?**

Presenter: Meredith Jones
Researcher and Author, *Women of the Street,*
Why Female Money Managers Generate Higher Returns (And How You Can Too)

10:45-11:15 **Networking Break**

11:15-12:00 **Due Diligence: Examining the Diversity Dividend**

Moderator: Kenny King
Managing Director, Americas Head of Capital Introduction and Consulting, J.P. Morgan

Panelists: Alifia Doriwala
Managing Director, The Rock Creek Group

Andrew Finver
Director of Hedge Fund Research, Progress Investment Management Company

Joseph McGuane
Senior Research Associate, Alternatives, Marquette Associates

Judith Posnikoff
Founding Partner, PAAMCO

12:00-1:30 **Networking Lunch**

1:30-2:15	**Best Practices: Alignment of Interests between Investors & Managers**	
	Moderator:	Ron McIntosh CPA/CFA Senior Portfolio Manager, Co-Founder, Lomas Capital Management LLC
	Panelists:	Kelly Chesney Principal, Pluscios Management
		Dianna (DiIorio) Henrich, CFA Senior Vice President, Public Markets Investments, GCM Grosvenor
		Terri Engleman Rhoads President & Managing Partner, Kettera Strategies
2:15-3:00	**Asset-raising Opportunities & Challenges for the Emerging Manager**	
	Moderator:	Marta Cotton Principal and Director of Client Development, Matarin Capital
	Panelists:	Julie DeMatteo Managing Director, R. J. Oasis
		Katina Stefanova CEO and CIO, Marto Capital
		Sona Wang Managing Director, Chicago Blues Experience
3:00-3:30	**Networking Break**	
3:30-4:15	**Women in Investment Management: Values & Where to Find Them**	
	Presenter:	Wendy Pirie, PhD, CAIA, CFA Curriculum Projects, CFA Institute
4:15-5:00	**The Path to Growth: Emerging Manager to the Next Level**	
	Moderator:	Kirk Rostron Managing Partner, Mt. Vernon Capital, LLC
	Panelists:	Aoifinn Devitt Chief Investment Officer, Policemen's Annuity and Benefit Fund of Chicago
		Lofton Holder Partner, Pine Street Alternative Asset Management
		Craig McCrohon Appointed Board Member, Illinois SURS
		Morgan Webber Managing Director, Adams Street Partners
5:00-6:00	**Networking Reception**	

SPEAKER BIOS

JANE ABITANTA

Jane is the founder of Perceval Associates, a consultancy focused on helping asset managers deliver more compelling messages to their investors. Jane occupies a special position in the institutional investment arena that comes from her ability to diagnose the underlying problems that get in the way of money managers, and provide successful solutions that help them attract and retain capital.

Since 1996, Jane has advised many of the top institutional fund managers, family offices and over 150 hedge funds, helping them to articulate their particular edge in terms of the real-world needs of their markets. She is well known for her combination of industry expertise, unbiased eye and a direct communication style that makes even the most accomplished money managers seek her advice. Marketing directors particularly appreciate Jane's successful coaching of investment professionals on the clear, concise and compelling delivery of their investment process.

Jane is a director of 100 Women in Hedge Funds, a global association of over 15,000 women focused on education, professional leverage and philanthropy. She has served as charter faculty of the Institute for Private Investors, a member of the Investment Committee of Women's World Banking, and director of the Association for Investment Management Sales Executives (AIMSE). She is a former director of Green Cay Asset Management, a Bahamas-based alternative investment firm and of Shaking the Tree, a not-for-profit organization that uses interactive theater to illustrate family wealth dynamics.

Prior to the formation of Perceval Associates in 1996, Jane was an investment strategist with Citicorp Investment Management and held executive marketing positions at Bessemer Trust and Swiss Bank Corporation.

With an MBA in Finance and Investment Management from Fordham University, and a BA in Economics and Political Science from the University of Delaware, Jane earned an MA in Social-Organizational Psychology and Change from Teachers College, Columbia University in 2008.

Perceval is proud to include Angelo Gordon & Co., Apollo Management, Blackstone, Corbin Capital Partners, Hudson Bay Capital, Campden/Institute for Private Investors, Oak Hill Advisors, Pershing Square Capital Management, Taconic Capital Advisors and Veronis Suhler Stevenson among its clients.

KELLY CHESNEY

Kelly Chesney is a co-founder and the Chief Operating Officer of Pluscios Management LLC, a women owned, SEC registered investment manager that advises institutional investors on hedge fund investing and runs a family of funds of hedge funds. Pluscios is consistently recognized for creating top ranking portfolios. She and her co-founder launched Pluscios in 2006 having previously run JPMorgan's (formerly Bank One's) Chicago Hedge Fund Group. Ms. Chesney received an M.B.A. from the Kellogg Graduate School of Management at Northwestern University, a J.D. from IIT Chicago-Kent College of Law, and has over 25 years of legal and capital markets investment experience. Kelly was recently identified as one of the top female "market wizards" in the book "Women of the Street: Why Female Money Managers Generate Higher Returns (and How You Can Too)" by Meredith A. Jones (Palgrave Macmillan 2015).

MARTA COTTON
Marta Cotton joined Matarin Capital Management as Principal and Director of Client Development in September 2011. Her responsibilities include oversight of all client relationship management and marketing functions.

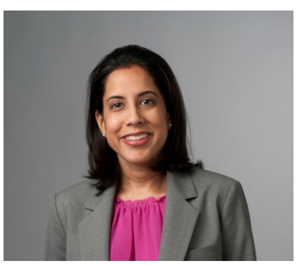
Marta is a former Managing Director from the Securities Division of Goldman, Sachs & Co. She represented, as senior relationship manager, the institutional franchise of Goldman Sachs to key hedge fund, mutual fund and pension fund clients. She spent 16 years at the firm in both the New York and Chicago offices. She managed a sales and trading team and ran the International Equities business in Chicago, while playing a key role building the firm's international equity business. Prior to Matarin, Marta served as a consultant for marketing strategy and business development for Helen Young Hayes, the former CIO of Janus Capital. Prior to that, she was a Director for Investment Management Business Development at Gerson Lehrman Group.

Marta holds an MBA from the University of Chicago and a BS from the University of Florida.
Marta is on the 100 Women in Hedge Funds Advisory Council, leads the Senior Practitioners Outreach and is a Sustaining Angel. She is also a Director of the Harlem Educational Activities Fund (HEAF).

JULIE DEMATTEO
Julie DeMatteo is the Managing Director of RJ OASIS. She is responsible for overseeing the activities of the firm's commodity pool operator and broker-dealer activities. She primarily focuses on business development activities for the division working with both investors and managers to provide alternative investment solutions. Prior to joining R.J O'Brien, she held various positions in the asset management and futures industry.

Ms. DeMatteo was Executive Director of Business Development for AlphaMetrix LLC and previously a Director, President, and Chief Executive Officer of UBS Managed Fund Services Inc. (UBSMF). She holds a Bachelor of Science in Accounting and Finance from Eastern Illinois University and Juris Doctorate from Loyola University College of Law. www.rjoasis.com

AOFFINN DEVITT
Coming Soon...



ALIFIA DORIWALA
Alifia Doriwala is a Managing Director and Partner at The Rock Creek Group. She is a member of the firm's Investment Committee and is involved in portfolio management, asset allocation and manager selection across alternative and traditional asset classes. At Rock Creek, she has sourced and invested in a number of top-tier active managers on behalf of endowments, foundations, and pension funds. Prior to joining Rock Creek, Ms. Doriwala was an Equity Arbitrage Trader at Wolverine Trading, L.P., where she was responsible for analyzing, modeling, and trading equity spreads resulting from corporate transactions. Prior to that, she was an Investment Banking Analyst in Merrill Lynch's Financial Sponsor Group, where she assessed the suitability of potential targets for private equity portfolio companies. Ms. Doriwala graduated from Georgetown University magna cum laude with a B.A. in Economics and English and holds an M.B.A. in Finance and Marketing from New York University's Stern School of Business. She is a Trustee Board Member and Member of the Investment and Finance committees at The Langley School.

ANDREW FINVER
Andrew is responsible for leading the research and manager sourcing for the firm's Hedge Fund platform. Andrew is involved with the selection and portfolio construction with regards to emerging hedge funds. Andrew has over 14 years of experience, most recently as the director of US research for The Torrey Funds, an emerging manager fund of funds. At Torrey, Andrew was a partner, served on the Investment Committee, and helped triple the firm's AUM. Prior to Torrey, Andrew was an analyst at Valenzuela Capital Partners and an associate in GE Capital's Structured Finance Group. He started his career in HSBC's merger & acquisitions team. Andrew earned a bachelor of arts degree in political studies/ psychology from Pitzer College in Claremont, CA, and a masters in international affairs from Columbia University.

DIANNA (DIIORIO) HENRICH, CFA
Ms. Henrich serves as a Public Markets Portfolio Manager for multi-strategy portfolios as well as other specialized strategies and custom mandates. Ms. Henrich leads activities related to the construction, implementation and monitoring of portfolios. Prior to joining GCM Grosvenor, Ms. Henrich was a Senior Financial Analyst at Goldman Sachs in Private Wealth Management and worked closely with clients to make asset allocation and manager selection decisions. She was also previously at the JPMorgan Private Bank, where she worked with bankers, investors, wealth advisors, and fiduciary officers to service ultra high net worth individuals. Ms. Henrich received her Bachelor of Arts cum laude with department honors, double majoring in Economics and Mathematical Methods in the Social Sciences, from Northwestern University and her Master of Business Administration with honors and Beta Gamma Sigma membership from the University of Chicago Booth School of Business. Ms. Henrich holds the Chartered Financial Analyst® designation.

LOFTON HOLDER
Lofton Holder is one of the founding principals and Managing Partner for Pine Street Alternative Asset Management Company LLC ("Pine Street"). Pine Street provides seed capital to Hedge Fund managers, with a particular focus on women and minority hedge fund managers.

Prior to creating Pine Street, Lofton was Managing Director in Investcorp's $5 billion Hedge Fund Group. Previous to Investcorp, he was a Managing Director at JPMorgan Asset Management. In this role from 1998 through 2005, he served the investment needs of major institutional investors across the U.S., including corporate, public, and Taft-Hartley pension plan sponsors. Lofton worked across multiple asset classes including Hedge Fund, Private Equity and Real Estate investments as well as long only equity and fixed income investments. Before 1998, Mr. Holder spent six years with JPMorgan Securities, Inc. as an investment banker and five years with The First Boston Corporation (currently Credit Suisse) in a similar role.

Mr. Holder currently serves as a Trustee and Chair of the Investment Committee for the Edwin Gould Foundation for Children.

Mr. Holder was awarded a Bachelor's Degree in Political Science from Columbia University and a Master's in Business Administration from the Yale School of Organization and Management.

MEREDITH JONES
Meredith is an alternative investment consultant and author of Women of The Street: Why Female Money Managers Generate Higher Returns (And How You Can Too), which won an Axiom Award Gold Medal in 2016. She began her alternative investment career at Van Hedge Fund Advisors International (VAN), where she was Director of Research. At VAN, Meredith was responsible for manager selection, due diligence, index construction and aggregate industry research for the $500 million fund of funds.

Meredith was then recruited by hedge fund analytics provider PerTrac Financial Solutions. There she focused on industry trends with an eye to providing actionable insights and information. Her research on emerging managers, initiated in 2006, and women and minority-owned funds created new investment categories. It has changed the way investors and money managers behave - both in the way investors allocate and how money managers market to and seek investors.
Meredith then went on to be Director at Barclays Capital Strategic Consulting Group. There she consulted for clients and authored white papers, including her first white paper on women and minority-owned investing.

Until the acquisition of Rothstein Kass by KPMG, Meredith served as Director of the Rothstein Kass Institute, an Alternative Investment Think Tank at the professional services firm Rothstein Kass (RKCO). There she created the first Women in Alternative Investments Hedge Fund Index to measure performance of female hedge fund and private equity managers.

KENNY KING

Kenny D. King is a Managing Director and the Head of the Americas Capital Introduction and Consulting Team. Kenny manages a team of 17 individuals who seek to introduce institutional investors and third-party vendors to the firm's hedge fund clients. Prior to assuming this role, Kenny spent three years managing the EMEA Capital Introduction Group in London. Kenny has spent his entire career working with hedge fund managers; his career started as an analyst for Merrill Lynch Investment Managers Alternative Strategies and then he joined Bear Stearns as the Head of Due Diligence for its Structured Funds business.

Born and raised in Staten Island, New York, Kenny holds a B.S. in Management from Tulane University and is a CFA Charter holder. Kenny lives in Rumson, NJ, where he enjoys spending time with his wife, daughter, and son. With his spare time, Kenny enjoys golfing and reading non-fiction books.

CRAIG MCCROHON

Craig McCrohon is a partner with Burke, Warren, MacKay and Serritella in Chicago, where he specializes in corporate, securities, and mergers and acquisitions law. He advises companies and boards of directors regarding corporate transactions, director and officer liability, corporate finance and regulatory matters. His work has included organizing bank holding companies, depository institution compliance, mergers and acquisitions, and securities offerings.

McCrohon is a graduate of Harvard University and received his JD and MBA degrees from the University of Pennsylvania Law School and Wharton School of Business.

McCrohon previously worked with the legal staff of the United States Senate Committee on Banking, Housing and Urban Affairs. He serves on the boards of the Infant Welfare Society of Chicago and the Better Government Association.

JOSEPH MCGUANE

Joe McGuane is a senior research analyst for Marquette Associates and has over 11 years of investment experience. He joined Marquette in 2016 and is responsible for reviewing alternative investment research and due diligence, particularly in the hedge fund, private equity, MLP, and liquid alternatives asset classes.

Prior to joining Marquette, Joe was an associate director at Nasdaq. Previously, he worked for HFR Asset Management as an investment analyst. Joe holds a B.B.A. in finance from the University of Iowa.

RON MCINTOSH, CPA/CFA

Ron McIntosh is a Senior Portfolio Manager and Co-Founder of Lomas. He has over 29 years of investment experience focusing on the financial sector. From 2003 to 2011, Mr. McIntosh was a Senior Portfolio Manager at Caxton Associates where he was responsible for, and had discretion over, investments in financial stocks. From 1986 to 2003 he was an analyst at Fox Pitt, Kelton, Inc. where he covered U.S., Canadian and European insurance stocks, and for which Fox Pitt, Kelton frequently received high rankings by Greenwich Associates. While at Fox Pitt, he was part of a senior team that built the company before it was ultimately sold to Swiss Re, and he also played an integral part in initial public offerings of life insurance company demutualizations including John Hancock, MetLife, Principal Financial and Prudential. Mr. McIntosh received his B.S. in Accounting from the University of Connecticut, and he holds both a CPA and a CFA designation. Mr. McIntosh also sits on the Investment Committee Board of the University of Connecticut.

WENDY PIRIE, PHD, CAIA, CFA

Coming Soon...

JUDITH POSNIKOFF
Judith Posnikoff, PhD is a Managing Director and one of the founding partners of PAAMCO. From PAAMCO'S inception, Judy has been involved in all aspects of the firm's investment process, having served as a Sector Specialist for Equity Market Neutral and Merger Arbitrage and Chair of the Investment Oversight Committee. She is currently focused on portfolio construction as a member of the firm's Portfolio Construction Group, setting strategy and asset allocation for the firm's flagship moderate multi-strategy portfolios. Judy is a member of the founding board of directors of the Association of Women in Alternative Investing (AWAI) and is on the board of 100 Women in Hedge Funds and the CAIA Foundation. Judy also chairs the scholarship committee of the 100 Women in Hedge Funds Institute.

TERRI ENGLEMAN RHOADS
Terri Engelman Rhoads is President and Managing Partner of Kettera Strategies, operator of the Hydra Platform, a marketplace of alternative investment strategies. Ms. Engelman Rhoads has over 27 years of industry experience, providing institutional investors with customized managed account solutions in hedge fund and CTA investments. Over the last ten years, Ms. Engelman Rhoads served as President of Midwest Management Group, where she sat on the investment committees of both public and private pensions and endowments assisting with investments in the alternative space. Prior to this, Ms. Engelman Rhoads served as President of NIP, where she built a customized, completely transparent fund of managed accounts utilizing hedge funds and CTAs that was accessed by institutional investors worldwide. Ms. Engelman Rhoads was an original partner at Guggenheim Group, and President of Guggenheim Management Partners, responsible for the build-out of their infrastructure and product development in Guggenheim's hedge fund and managed account offerings. Ms. Engelman Rhoads has broad experience in all aspects of manager research, product construction, performance measurement, and program administration. She has been a speaker at conferences worldwide on the subject of portfolio construction, transparency and risk-reducing vehicles. She graduated from the University of Colorado, Boulder with a BA in Economics.

KIRK ROSTRON
Kirk T. Rostron is a managing partner of Mt. Vernon Capital, LLC, a merchant bank focused on direct investing and advisory services. Prior to forming Mt. Vernon Capital, Kirk was a Partner with the Mercury Capital Distribution team, a global placement agent which merged with his former firm, the Mt. Vernon Group, an alternative investment placement agent. Prior to that, Mr. Rostron served as a Director in Merrill Lynch's Hedge Fund Development and Management Group focusing on worldwide private placement of alternatives. He was also Director and Head of U.S. Capital Introduction in Merrill Lynch's Global Equity Finance and Services Group, which he started. He previously served as COO and Executive Vice President for Hovde Capital Advisors. Earlier, he founded and later sold Hedgecall.com, a service of Investor Broadcast Network that was seeded by Intel Capital Group, Safeguard Scientific, and Paine Webber. He holds a Bachelor of Arts degree in International Affairs and Economics from Florida State University and a Master's Degree in International Economic Integration from the University of Birmingham (U.K.). He is also the founder of the No Greater Sacrifice Foundation, ('NGS") whose nationwide mission is dedicated to advancing the higher education of the children of America's fallen and wounded service members. He also served as a Trustee on the Board of the Florida State University Foundation and the Board of Governors for the Florida State University School of Business.

KATINA STEFANOVA
Katina Stefanova is the CEO and CIO of Marto Capital, a global, systematic absolute return strategy that trades in many diversified markets including FX, rates, equities and commodities. Katina frequently speaks at many conferences and events across the globe on topics including investing, technology, and entrepreneurship and is a thought leader on disruption in the asset management industry. Prior to founding Marto Capital, Katina spent over 9 years at Bridgewater Associates as a Senior Executive. She began her career there as a Senior Investment Associate. Katina then became a Management Committee Advisor, where she held leadership roles overseeing various areas of the firm. Prior to Bridgewater, Katina was a senior leader in the financial services and technology space, including serving as a Director of Business Strategy at IBM. She is also the co-founder of AcordIQ, which delivers state of the art portfolio intelligence and governance solutions with expert consulting services to asset managers and institutional investors. Katina holds an MBA from Harvard Business School and a BA in International Relations from Brigham Young University.

SONA WANG
Sona Wang is a Co-founder and Managing Director of the Chicago Blues Experience, LLC, an international quality music museum and performance center to be located in downtown Chicago.

Wang possesses over 25 years of venture investment experience. Since 1987, she has co-founded and managed three Illinois-based venture capital funds. Previously, she was an investment manager with Allstate Venture Capital, one of the oldest institutional venture funds with over $500 million invested. Her investment focus has been in information technology, business services, and healthcare.
Prior to her career in venture capital, Wang was employed with Intel Corporation in key management positions in engineering, manufacturing, and marketing.

Wang currently serves or has served on numerous Boards including Aspire Inc, TrafficCast International, Inc., Blue Cross Blue Shield of Illinois, NorthShore University HealthSystem, Board of Trustees of Northwestern University, Board of Trustees of Columbia College Chicago, Board of Trustees of the Chicago Symphony Orchestra, She currently serves on the Chicago Mayor's ChicagoNext Council, and was previously appointed as Chairman of the Illinois Governor's Economic Recovery Commission Committee.

Wang was the recipient of the YWCA Leadership Award for Entrepreneurship. She was recognized as one of the "100 Most Influential Women in Chicago" by Crain's Chicago Business in both 2004 and 2008, as Business Leader of Color by Chicago United, and as one of the "Corporate Directors to Watch" by Directors & Boards Magazine in 2008. She earned a bachelor's in industrial engineering from Stanford University and graduated magna cum laude with an MBA from Northwestern University's Kellogg Graduate School of Management.

She resides in Evanston, Illinois with her husband, William Selonick.

MORGAN WEBBER
Morgan is responsible for all aspects of the primary investment process, including fund selection, due diligence, negotiations, monitoring, and General Partner relationship management.

Prior to joining Adams Street Partners, Morgan was an Associate for Blackrock Private Equity Partners. Morgan participated in investment research, analyses, due diligence and deal execution on both co-investment and primary fund investment opportunities. Prior to Blackrock, Morgan was with Merrill Lynch Investment Managers in their Institutional Sales and Marketing Group.

Morgan holds an MBA from Tuck School of Business at Dartmouth and a BA from University of Wisconsin.

CONFERENCE ATTENDEES

FINAL

Jane Abitanta
Founder
Perceval Associates
New York, NY USA

Erin Archer
Director of Investments
DePaul University

Rishi Awatramani
Head of Client Solutions - Vision
AON
Chicago, IL USA

Mitch Baruchowitz
Merida Capital

Catherine Beard
Director of Research
Blueprint Capital Advisors
New York, NY USA

Kacie Bidwill
Marketing Associate
Santa Barbara Asset Management

Vaughn Blake
Managing Director
Autochrome Ventures
Los Angeles, CA USA

Monica Blocker
Vice President, Business Development
Houlihan Capital

Chris Bole
MD
Ramius LLC
New York, NY USA

Danielle Bourbeau
Executive Marketing
Capital Trading Group
Chicago, IL USA

Matthew Bradbard
Director
RCM Alternatives
Chicago, IL USA

Todd Briggs, CPA, CAIA
Partner, Financial Services Group
RSM US LLP
USA

Matthew Burnias
CEO
MB Blue
Marina Del Rey, CA USA

Peggy Caldwell
Senior Vice President, Institutional Sales
Progress Investment Management
San Francisco, CA USA

Michael Chatwin
Head of Business Development
Gallery Capital
Atlanta, GA USA

Wai Yee Cheng
Senior Vice President
GCM Grosvenor
Chicago, IL USA

Kelly Chesney
Principal
Pluscios Management
Evanston, IL USA

Ben Cossey
Manager
Stable Asset Management
London, United Kingdom

Marta Cotton
Principal and Director of Client Development
Matarin Capital Management
Stamford, CT USA

Michael Coyne
Vice President
Northern Trust Hedge Fund Services
Chicago, IL USA

Michelle Cronin
Board Member

CONFERENCE ATTENDEES

FINAL

Sophia Dardashti
Business Development Analyst
WorldQuant (Millennium)
New York, NY USA

Julie DeMatteo
Managing Director
RJOasis
Chicago, IL USA

Aoifinn Devitt
Chief Investment Officer
Policemen's Annuity and
Benefit Fund of Chicago
Chicago, IL USA

Yvonne Dier
President
Dier Associates, LLC
Ramona, CA USA

Laleen Doerrer
Director
Kaizen
Chicago, IL USA

Alifia Doriwala
Managing Director
The Rock Creek Group

Gregory Dryer
Director of Marketing and Investor Relations
Lomas Capital
New York, NY USA

James Duran
Managing Partner
Sabre Capital Partners
Evanston, IL USA

Valentina Durand
MBA student/
investment research analyst
The University of Chicago Booth
School of Business

Mike Durkin
Managing Director
O'Brien International Family Office
Skokie, IL USA

Ashley Edmund
Director, Client Relations
Kettera Strategies
Chicago, IL USA

Eric Eiers
Institutional Prime Services
ADM Investor Services
Chicago, IL USA

Terri Engleman Rhoads
President & Managing Partner
Kettera Strategies
Chicago, IL USA

Andrew Finver
Director of Hedge Fund Research
Progress Investment
Management Company
San Francisco, CA USA

Carol Foley
President
Podesta & Co.
Chicago, IL USA

Ellen Fong

Emily Fox
Vice President, Consultant Relations
Santa Barbara Asset Management

Rebecca Garces
VP - Head of Portfolio Compliance
Nuveen Investments

Caroline Gillespie Greer
Managing Director
Commonfund
Wilton, CT USA

Alan Handler
Business Development
SBB Research Group
Northbrook, IL USA

Trey Hart
Senior Vice President
Northern Trust
Chicago, IL USA

CONFERENCE ATTENDEES

FINAL

Eric Hartman

Dianna Henrich
CFA, Senior Vice President,
Public Markets Investments
GCM Grosvenor

Deborah Hill
Director
Kaufman Hall

Mark Hines
Left Brain Capital Management, L.P.
Naperville, IL USA

Lofton Holder
Partner
Pine Street Alternative Asset
Management

Jacqueline Horwitz
Partner
MJIC
Lake Forest, CA USA

Larry Horwitz
General Counsel
MJIC
Lake Forest, CA USA

Larry Howell
CIO
Howell Family Trust
Oklahoma City, OK USA

Jennifer Jones
Private Bank

Meredith Jones
Author
Women of the Street: Why Female Money Managers Generate Higher Returns (And You Can Too)

Kerry Jordan
Chief Operating Officer
D'Orazio Capital Partners
Chicago, IL USA

Steve Kann
Washington, DC USA

Sturges Karban
CEO
MJIC
Lake Forest, CA USA

Charlie Kerr
Marketing and Investor Relations
Lomas Capital
New York, NY USA

Thomas W. Kim
Co-CIO and VP
Mansur & Company

Kenny King
Managing Director, Americas Head of
Capital Introduction and Consulting
J.P. Morgan

Nancy Kowalczyk
Counsel
Latham Watkins LLP

Margaret Leung
UIT Product Specialist
Nuveen

Kate Liebelt
Chief of Staff
Deloitte Consulting LLP

Brad Long
Research Director
DiMeo Schneider & Associates
Chicago, IL USA

Stefanie Loren
Operations and Marketing Associate
Greenbriar Asset Management

CONFERENCE ATTENDEES

FINAL

Caroline Lovelace
Managing Partner
Rose Hill Park Alternative Asset Managers
New York, NY USA

James Maloney
Chairman Investment Committee
Chicago Police Pension
Chicago, IL USA

Jennifer Marling
Assistant Vice President, eSurveillance and Privacy
Nuveen Investments

Michael Marrapese
Partner
MarketCipher Partners, LLC
Ponte Vedra Beach, FL USA

Sandra Martin
Managing Director
Martin Investment Management, LLC
Evanston, IL USA

Angela Matheny
Client and Consultant Coordinator
Colonial Consulting, LLC
New York, NY USA

Craig McCrohon
Appointed Board Member
Illinois SURS

Christine McGrath Kamrass
Sr Vice Pres
Jefferies Co

Ron McIntosh CPA/CFA
Senior Portfolio Manager, Co-Founder
Lomas Capital Management LLC
New York, NY USA

Jeanine Meola
Director, Institutional Sales
Fairpointe Capital LLC
Chicago, IL USA

Juan Muldoon
Principal, New Ventures
Invenergy Future Fund
Chicago, IL USA

Amanda Murphy
Director of Institutional Sales
Backstop Solutions Group

Malik Murray
Vice President
Ariel Investments
Chicago, IL USA

Kartik Natarajan
Partner
Blue Cloud Ventures
New York, NY USA

Kevin OBrien
Futures Specialist
Morgan Stanley

MIchele Ormont
Strategic Marketing Manager
Santa Barbara Asset Management

Debra Panzarella
Partner
KPMG

Andrea Pavone
Product Controller
UBS O'Connor LLC

Theron Picketts
Denali Advisors

Marta Pilch
Assistant Vice President
CNA

Wendy Pirie, PhD, CAIA, CFA
PhD, Director, Curriculum Projects
CFA Institute

CONFERENCE ATTENDEES

FINAL

Judith Posnikoff
Founding Partner
Pacific Alternative Asset Management Company (PAAMCO)
Irvine, CA USA

Hana Prince
Investor Relations
Left Brain Capital Management, L.P.
Naperville, IL USA

Katherine Reap
Principal
Loyola Capital Management, LLC

Amy Rogowski
Deloitte
Chicago, IL USA

Kaitlyn Rossi
Research Analyst
50 South Capital
Chicago, IL USA

Jake Rossof
Chief Risk Officer
Kettera Strategies
Chicago, IL USA

Kirk Rostron
Managing Partner
Mt Vernon Capital, LLC

Heather Rucci
Senior Vice President, Human Resources
Nuveen Investments

David Sachs
Investments
Stable Asset Management
New York, NY USA

Ferenc Sanderson
Director of Marketing
Elizabeth Park Capital Management
Pepper Pike, OH USA

Scott Schweighauser
Managing Partner
Borealis Strategic Capital Partners

Samir Shah
Founder, CEO and CIO
MBS Mantra, LLC
Stamford, CT USA

Lisa Shields
Tax Partner
Deloitte Tax LLP

Randy Shipley
CrowdFundConnect
Chicago, IL USA

Mark Shore
Chief Research Officer
Shore Capital Research LLC

Nell Sloane
Principal
SAA Management LLC
Chicago, IL USA

Urban Smedeby
Managing Director
MJIC
Lake Forest, CA USA

Katina Stefanova
CEO and CIO
Marto Capital

Sandra Stoutenburg
CEO
Wind Rider Capital
Whitefish, MT USA

Connie Teska
Principal
Pluscios Management
Evanston, IL USA

Ajai Thomas
Managing DIrector,
Head of Investor Relations
Hollis Park Partners, LP
New York, NY USA

CONFERENCE ATTENDEES

FINAL

Quyen Tran
Director of Marketing
Reneo Capital
New York, NY USA

Ayse Tutek
Vice President and Senior Manager, Finance
Nuveen Investments

Raj Venkatesan
CIO
Trinity Alps Capital Partners
San Francisco, CA USA

Sona Wang
Managing Director
Chicago Blues Experience

John Wasilewski
Marto Capital

Morgan Webber
Managing Director
Adams Street Partners

Amy Welzer
Private Bank

Chris West
n2o4 Capital
Port Orange, FL USA

Laura West
n2o4 Capital
Port Orange, FL USA

Allison Wiegand
Internal Advisor Consultant
Nuveen Investments

Aimee Wight
Director
Monroe Capital

Daniel Winkler
Managing Partner
Sabre Capital Partners
Evanston, IL USA

Tariq Zahir
Managing Member
Tyche Capital Advisors
Mineola, NY USA

CONFERENCE LOCATION

The Conference Center

One North Wacker

Chicago, IL

Meg Bode
MBode@TalkingHedgeEvents.com
516-869-6610

Kristin Fox
KFox@TalkingHedgeEvents.com
708-267-2584

www.TalkingHedgeEvents.com