



CUSTOMIZATION IS KEY: DELIVERING BESPOKE SOLUTIONS TO INSTITUTIONAL INVESTORS

OCTOBER/NOVEMBER 2020 SANTA MONICA
A VIRTUAL CONFERENCE VIA WEBINARS

CONFERENCE GUIDE

CONFERENCE SPONSORS





We are delighted to provide you with this program guide for our Santa Monica 2020 conference, ***Customization is Key: Delivering Bespoke Solutions to Institutional Investors***. This was our second virtual event, and we are grateful for the fantastic industry support that helped us bring it to life via a series of six webinar discussions.

Although we cannot gather in person, the Talking Hedge mission remains constant. We create a live forum for the alternative investment industry and its investors to connect. In the midst of a life altering global pandemic we've been honored to host a series of panel discussions and encourage alternative investment experts to come together virtually and keep talking!

Our content is designed to engender substantive conversations about the investment hurdles that asset owners and fiduciaries face, and to put a spotlight on the many solutions created by managers and solutions providers that help investors mitigate risk, mine for alpha, and achieve operational efficiencies.

Many thanks to our outstanding speaking faculty for their sharing their best ideas, research, opinions, and expertise.

We are privileged to have collaborated with **Crabel Capital Management** and **InfraHedge Limited/State Street**, as well as **Aspect Capital Limited**, **Bodhi Research Group**, **Camden Asset Management**, **FARCapital**, **Innocap**, **Martlet Asset Management**, **ROW Asset Management**, **SLC Management**, **TD Securities**, **Vidrio Financial**, and **Welton Investment Partners**.

And we are grateful to our association partners who helped us spread the word about the virtual conference: **AIMA**, **CAASA**, **CAIA**, and **CalALTS**.

Stay healthy and safe, enjoy your holidays, and all my best for a promising 2021!

Meg Bode
Founder

CONFERENCE PROGRAM

Friday, October 2, 2020

Macro Strategies: Exploiting Their Power to Protect a Portfolio

- Moderator:** Chris Solarz, CFA, CPA, CAIA
Managing Director, Cliffwater LLC
- Panelists:** Grant Jaffarian
Portfolio Manager, Crabel Asset Management
- Anoosh Lachin, PhD
Portfolio Manager, Aspect Capital Limited
- Ryan O'Grady
Co-Founder & Chief Executive Officer, ROW Asset Management
- Justin Young, CAIA
Senior Investment Officer, South Carolina Retirement System Investment Commission

Friday, October 9, 2020

Managing Risk and Improving Alpha with Customization

- Moderator:** Joshua Leonardi
Director, Capital Introduction, TD Securities
- Panelists:** Mazen Jabban
Chairman & Chief Executive Officer, Vidrio Financial, LLC
- Daniel MacDonald, CFA
Head of Advisory & Pensions, Middlemark Partners
- Jonathan Planté, CAIA
Manager, Business Development & Investor Relations, Innocap
- Sharif Siddiqui
Director of Investments, The James Irvine Foundation

Friday, October 23, 2020

Managing Operational Alpha in a Volatile Market

- Moderator:** Rob Vanderpool
President, InfraHedge North America, and Managing Director,
State Street Global Services, Alternative Investment Solutions
- Panelists:** Jimmy D. Castro
Director, Investment Transactions, Office of the Chief Investment Officer,
Regents of the University of California (UC Investments)
- Carlos Ferreira, CPA, CFA, FRM
Managing Director, Head of Investment Operations, PAAMCO Prisma
- Ray Joseph
Vice President, Wilshire Associates
- Thom Young
President, FAR capital LLC

Friday, October 30, 2020

Portfolio Construction: Putting It All Together for the Optimal Result

Moderator: James McKenna
Director of Investment Solutions, Camden Asset Management

Panelists: Kenneth Frier, CFA
Principal, SECOR Asset Management

Susanne Gealy
Senior Director, Investments, Treasury, CommonSpirit Health

Edgar Smith, CFA
Managing Director, USC Investment Office

Amit Thanki, CAIA
Senior Investment Officer, San Bernardino County Employees Retirement Association

Friday, November 13, 2020

Dealing With Unpredictable Markets – What New Solutions Are There?

Moderator: Ranjan Bhaduri, PhD, CFA, CAIA
Founder, President & CEO, Bodhi Research Group

Panelists: Brian Broadway
President, Gryphon Capital Management, LLC

John Linder, CFA, CPA
Managing Director, Business Development, SLC Management

Judith Posnikoff, PhD
Managing Director, Martlet Asset Management

Rafael Silveira, PhD
Executive Director – Head of Client Solutions North America, LGT Capital Partners

Friday, November 20, 2020

The State of Play in ESG and Responsible Investing

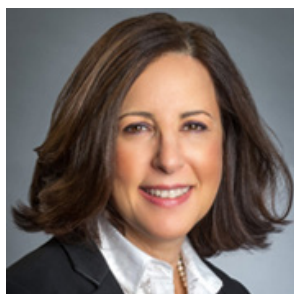
Moderator: Anuj A. Shah
Managing Director, KKS Advisors

Panelists: Catherine Banat
Managing Director, Director, Responsible Investing, RBC Global Asset Management

Tamara Close, CFA
Founder & Managing Director, Close Group Consulting

Basil Williams
Chief Executive Officer, Welton Investment Partners

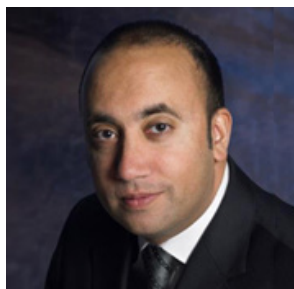
SPEAKER BIOS



CATHERINE BANAT

Managing Director, Director, Responsible Investing, RBC Global Asset Management

Catherine Banat oversees the Responsible Investing Platform for RBC GAM-US. As an ambassador for the value proposition associated with Responsible Investing and the strategic approach of RBC, she champions ESG and Impact Investing with clients and prospects. Catherine is a keen advocate of responsible investing within the broader investment community as a resource to asset owners and advisors seeking to expand their understanding of ESG integration and impact investing. She serves as a thought leader and relevant voice advocating for combining a competitive financial return with a sustainable investing lens. Prior to joining RBC GAM, Catherine managed strategic initiatives, risk and compliance for The New York City Retirement Systems, an over \$150 billion public pension plan, where she also researched, developed and implemented the strategic plan for the Economically Targeted Investment (ETI) program. Catherine has dedicated her entire career to the financial services industry and has held senior level positions at Paloma Partners, Goldman, Sachs & Co., C3 Capital and Lehman Brothers. Catherine has more than 20 years' experience in the investment industry. She earned a BA in history and a BSE in management from the University of Pennsylvania and the Wharton School, as well as an MBA in finance from Columbia University. Catherine holds FINRA Series 7 and 63 licenses.



RANJAN BHADURI, PHD, CFA, CAIA

Founder, President and Chief Executive Officer, Bodhi Research Group

Dr. Ranjan Bhaduri is the Founder, President & CEO of Bodhi Research Group. Bodhi Research Group is focused on research and education in the alternative investments industry. Dr. Bhaduri has extensive experience in hedge fund research, hedge fund factorization, portfolio management, and due diligence (investment, operational, and structural). Dr. Bhaduri has designed and implemented an institutional due diligence and research program. Dr. Bhaduri has worked closely with pensions, sovereign wealth funds, endowments, and family offices globally. Dr. Bhaduri has ten years of experience at managed account platforms. Dr. Bhaduri's experience also includes being on an Investment Committee at Morgan Stanley where he conducted due diligence and helped design customized portfolios of Alternatives. Earlier, he was at a Canadian Fund of Funds, and at a multi-billion dollar capital management firm where he was involved in all aspects of its fund of hedge funds and structured finance business. He has also worked with two major Canadian investment banks in the Financial Strategy Consulting Group and in Global Risk Management & Control, respectively. Dr. Bhaduri has a winning track record of leadership and training. Several of his former analysts and interns have gone on to have successful careers and have held positions at prestigious organizations, including the following firms: Ontario Teachers' Pension Plan, Goldman Sachs, J.P Morgan, Wisconsin Alumni Research Foundation, Securities Exchange Commission (SEC), Neuberger Berman, and Crabel Capital Management. Dr. Bhaduri has held an advisory role at the East-West Center, a leading think tank on the Asia-Pacific region. He has taught finance and mathematics at several universities and lectured on Derivatives for the Montreal Exchange. Dr. Bhaduri has published papers on and been invited to speak worldwide regarding hedge fund issues, and advanced portfolio and risk management techniques. Dr. Bhaduri was invited by the CME to be part of a special delegation that met with regulators in Beijing and Taipei to discuss hedge fund issues. Dr. Bhaduri holds both the CFA and CAIA charters. He is a member of the American Mathematical Society, the Mathematical Association of America, the Toronto CFA Society, and PRMIA. Dr. Bhaduri previously served as a member of the All About Alpha Editorial Board and has previously served on the CAIA Chicago Chapter Executive and is currently a CAIA Toronto Chapter Executive. Dr. Bhaduri previously served on the Board of Directors of AIMA Canada, co-chair of AIMA Canada Managed Futures Committee, and on the AIMA Global Research Committee.

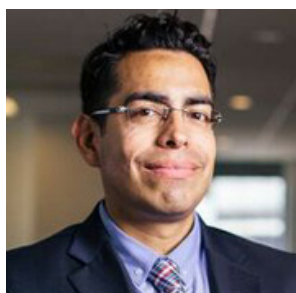
SPEAKER BIOS



BRIAN BROADWAY

President, Gryphon Capital Management, LLC

Mr. Broadway joined Gryphon in 2017 as the President. Mr. Broadway's duties include overseeing all of the daily operations of the family office as well providing strategic insight and direction in the areas of philanthropy and investment management for this multi-generation single family office. Mr. Broadway received his Bachelor of Science degree, with an emphasis in Accounting, from the University of Virginia in 1991 and an M.B.A., with an emphasis in Finance, from the University of North Carolina – Chapel Hill in 1999. From August 1991 through July 1995, Mr. Broadway worked in the assurance practice at Coopers & Lybrand, LLC, as a member of the Financial Services Team and became a licensed Certified Public Accountant in Virginia in 2004. From August 1995 through April 2014 Mr. Broadway was employed by Chesapeake Capital Corporation, an industry leading CTA, was a Principal, held various senior leadership positions and was the President of the family office of its' founder. From 2014 until earlier this year he was the COO and Principal of Aspen Partners, Ltd, a CTA based in Richmond Virginia. Mr. Broadway, and his wife, Janet, live in Manakin-Sabot, just outside of Richmond. Both he and his wife are involved in their church and in his spare time Mr. Broadway enjoys wing shooting, cycling, and international travel. Gryphon Capital is a 6th generation family office based here in Richmond, with an office in San Francisco as well. Gryphon currently provide financial and family services to 3 generations located around the country and helps the family with its investing and philanthropic efforts



JIMMY D. CASTRO

Director, Investment Transactions, Office of the Chief Investment Officer, Regents of the University of California (UC Investments)

Mr. Jimmy D. Castro is currently Director, Investment Transactions, for the Office of the Chief Investment Officer at the Regents of the University of California (UC Investments), a public university system consisting of 10 campuses, 5 medical centers, 3 national labs, managing assets of ~140B invested globally across asset class through the endowment, pension and working capital pools. He oversees Operational Risk, Operational due diligence and structuring of our global transactions, collaborating with global partners and instituting best practice governance framework within UC Investments while working with a fiduciary mindset. Prior to UC, he was the Chief Operating Officer and Risk Officer at Alpha4x Asset Management, a Global macro fund based in NYC. In 2012 he joined Bladex Asset Management as the Head of Operations and Chief Compliance Officer and spearheaded the Hedge Fund spinoff from Bladex Bank. He previously worked at Santander Investment Securities in the fixed income Team where he led improvements to investment process and syndication transactions and led off-site due diligence meetings and diligence reviews with trading partners. In 2004, he Joined JP Morgan Chase as an Associate in the FX Options desk. Mr. Castro joined Lehman Brothers in 2001 as an analyst in the Fixed Income Division working with the Emerging Markets Foreign Exchange traders primarily with NDF currencies. Mr. Castro has an MBA in Finance from Fordham Graduate School of Business in New York City and a Bachelor of Science degree in Finance from Manhattan College in New York City. In addition to spending time with family and friends, he enjoys road biking, running, racquetball, hiking and tennis during his time off.



TAMARA CLOSE, SIPC, MSC., CFA

Founder, Close Group Consulting and the Sustainable Risk Assessment Framework

Tamara began her investment management career in 1991. She held various investment management positions for the Bank of Montreal and Credit Lyonnais in the global derivatives and foreign exchange markets. In 2000 she was head of research for a start-up asset management firm in Montreal. In 2008 she joined PSP Investments and held senior management roles within the risk and public markets investment groups. In 2017 she founded an independent investment management strategy and ESG advisory firm, focusing on ESG integration practices for asset managers and asset owners. Tamara holds a Bachelors' degree in Economics from McGill, a Master's of Science degree in Finance from the John Molson School of Business (JMSB) as well as the Sustainable Investment Professional Certification from the JMSB. Tamara also holds the Chartered Financial Analyst (CFA) certification and is a council member of the Canadian Advocacy Council for CFA Societies Canada.

SPEAKER BIOS



CARLOS FERREIRA, CPA, CFA, FRM

Managing Director and Head of Investment Operations, PAAMCO

Carlos provides firm-wide leadership to the Accounting and Operational Due Diligence, Operations and Treasury, Legal and Investment Structuring, and Compliance groups. Carlos is also a member of the firm's Investment Oversight Committee. Before joining PAAMCO, he was Head of Operational Due Diligence for LGT Capital Partners, based in Switzerland, from 2007 to 2010. Prior to this, Carlos was CFO/COO and Head of Operational Due Diligence for KBC Alpha Asset Management in London from 2005, where he was responsible for the non-investment activities of the business, including fund accounting and operational due diligence on underlying fund investments. Previously, he worked for Morgan Stanley's Private Wealth Management (Europe) division, in their Client Strategy and Hedge Fund groups, and for Arthur Andersen (now Deloitte) as an international corporate tax practitioner. Carlos began his career with KPMG as an auditor. Carlos holds an MBA from the London Business School as well as a Bachelor of Commerce degree from the University of Toronto.



KENNETH FRIER, CFA

Partner, SECOR Asset Management

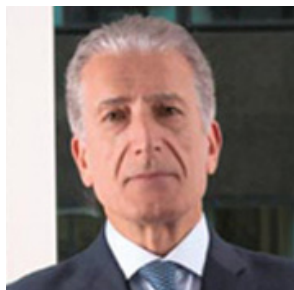
Ken Frier, CFA, is a Partner with SECOR Asset Management, an investment consulting firm based in NY. He has over 30 years of experience as an institutional investor, having been Chief Investment Officer of The Walt Disney Company, Hewlett-Packard Company, Stanford Management Company and the UAW Retiree Medical Benefits Trust. Ken graduated with honors in Mathematical Science from the University of North Carolina, Chapel Hill and has an MBA from the Stanford Graduate School of Business, where he was an Arjay Miller scholar.



SUSANNE GEALY

Senior Director, Investments, Treasury, CommonSpirit Health

Susanne Gealy is a Senior Director of the investments team at CommonSpirit Health based in San Francisco. She leads the organization's public and hedge fund equity investments. CommonSpirit Health is one of the largest health systems in the US, dedicated to providing quality, compassionate health care. The organization has an \$11 billion investment portfolio, allocated across the long-term strategic goals, retirement benefits, endowment, and insurance. Prior to joining CommonSpirit Health, Susanne spent 10 years at the Teacher Retirement System of Texas, in Austin, a \$150 billion retirement plan. At TRS, she was responsible for the \$26 billion external equity investment program comprising US, international, emerging markets, and global equity managers. Before joining TRS, Susanne worked in New York at Investcorp, Lazard Asset Management, a family office, and Banc of America Securities. She began her career in finance at JP Morgan in equity derivatives. Prior to attending business school, Susanne worked in the field of structural engineering in San Francisco. Susanne holds an M.B.A. from the University of Chicago's Booth School of Business. She has a M.S. and B.S. in Engineering from the University of Texas at Austin. Susanne is a board member of Trinity Charter School, a Texas charter school district dedicated to the educational needs of abused children.



MAZEN JABBAN

Chairman & Chief Executive Officer, Vidrio Financial LLC

Mazen founded Vidrio Financial in 2011 and is responsible for setting strategic direction and the firm's product development roadmap. In 1994, Mazen founded Focus Investment Group, an alternative investment firm, which incubated the development of the predecessor to the Vidrio Platform. In 1997 he started Focus Europa, one of the oldest European-focused fund-of-hedge-funds and in 2000 he established the Focus Star Fund, a hedge fund seeding program that identified and invested with emerging hedge fund managers. Prior to 1994, Mazen worked in real estate development and investment and later founded a management consulting and information systems company. He is an Adjunct Professor of Finance at NYU's Stern School of Business lecturing on alternative investments. Mazen received a B.S. in Engineering from the University of California – Berkeley (1978) and an M.B.A. in Finance from New York University, Stern School of Business (1981).

SPEAKER BIOS



GRANT JAFFARIAN

Portfolio Manager, Crabel Asset Management

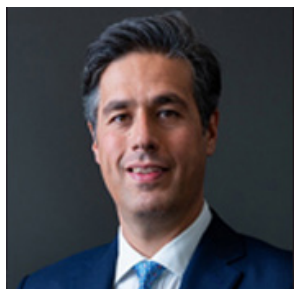
Grant Jaffarian, Portfolio Manager and a member of the Executive Committee, graduated from Wheaton College, IL with a double major in Economics and English in 2001. In 2010 Mr. Jaffarian received an MBA from University of Chicago. Mr. Jaffarian began his career at Belgium based Analytic Investment Management, a high turnover futures manager acquired by Robeco Bank. Upon leaving Analytic Investment, Mr. Jaffarian founded Petra Intraday, a short term systematic emerging manager. In 2004, Mr. Jaffarian joined Efficient Capital Management, LLC where he served as Chief Investment Officer before departing in December 2012. Mr. Jaffarian founded AlphaTerra, LLC in April 2013 to work with the world's most promising quant systematic trading strategies. In March 2014 AlphaTerra was acquired by Crabel Capital Management and Mr. Jaffarian assumed the role of Portfolio Manager for the Advanced Trend program.



RAY JOSEPH

Vice President, Wilshire Associates

Ray Joseph is a vice president of Wilshire Associates, and a member of the Wilshire Funds division's business development group. In this role Mr. Joseph is growing the division's presence as a premier provider of investment strategies and solutions, including factor based strategies, alternatives and other customized based strategies. Mr. Joseph has 25 years' experience, most recently at an investment bank where he was responsible for cross asset strategy, asset allocation and investor solutions for Pensions, Endowments, Foundations and Family Offices. Prior to his investment banking role, Ray was the Chief Investment Officer for the Office of the Special Trustee within the US Department of Interior managing \$4.3 Billion in asset for 566 American Indian Tribes, \$1.0 Billion for the US Treasury Department and 56 Million acres of real estate. Prior to his role with the US Government, Ray Joseph acted as the Deputy Chief Investment Officer and the Chief Investment Officer for the State of New Jersey's Division of Investment where he oversaw the pension investments, deferred compensation, 403 B, 529 and the State of New Jersey's Cash Management program which includes assets of approximately \$90 Billion in Assets. During Ray tenure the State of New Jersey was tied for #1 performance for Large Public Plans during 2009-2010. He also wrote and implemented the 2010 and 2011 Investment plan that delivered 18.03% at the end of 2011 which was the best return in 13 years. Prior to his role at the State of New Jersey, Ray created and directed the newly spinoff pension fund for Verizon Yellow Pages. Ray created a liability driven investment strategy during 2006 using an asset allocation of 50% HF, 30% Interest Rate Swaps, 15% 30 US Gov. Bonds and 5% Cash. During 2008 this investment strategy delivered a 3.2% return vs. -37.00% for the S&P 500 and also paid out 8% of the fund in benefit payments. Ray has Bachelor of Science degree in Finance from the State University of New York Buffalo and a Masters in Business Administration from the Johnson School at Cornell University.



ANOOSH LACHIN, PHD

Portfolio Manager, Aspect Capital Limited

Dr. Lachin joined Aspect in February 2016 as a Portfolio Manager. He is a founding partner of Auriel Capital Management, which was acquired by Aspect in February 2016. Prior to launching Auriel in 2004, he was a Senior Quantitative Analyst / Fund Manager / Researcher at Deutsche Bank Asset Management, London from 1999 to 2004. He started his career in 1996 as a Quantitative Strategist at IKOS Asset Management. He holds a PhD in Space Physics from Imperial College of Science, Technology & Medicine (London) after gaining a 1st class degree in Physics and is an Associate of the Royal College of Science.

SPEAKER BIOS



JOSHUA LEONARDI

Director, TD Prime Services LLC

Josh Leonardi is a Director and the Head of Capital Introduction at TD Securities LLC. Josh joined TD in May 2018 and is responsible for overseeing TD's Capital Introduction offering. Prior to joining TD, Josh was at Goldman, Sachs & Co. for 7 years where he first served as a Vice President and Assistant General Counsel for the Prime Services business before moving to Goldman's Capital Introduction team in 2015. Josh began his career at Fried Frank in 2006 where he was an associate in the firm's Asset Management practice and focused primarily on the structuring and representation of hedge funds and other alternative investment products. Josh received a B.B.A. in Finance from The George Washington University and his J.D. from New York Law School.



JOHN LINDER, CFA, CPA

Managing Director, Business Development, SLC Management

John joined Ryan Labs Asset Management, which is now Sun Life Capital Management (U.S) LLC, in 2018. Since joining, he has worked with clients on customized comprehensive fixed income solutions, incorporating traditional active fixed income strategies as well as futures overlay strategies. John works closely with consultants and plan sponsors focusing on traditional active fixed income allocations and economic crisis offset solutions. John's portfolio of work includes over 20 years as an advisor to public pension plans, consultants, foundations, and asset managers. He is a CFA Charterholder and Certified Public Accountant (CPA). John holds a B.A. from Middlebury College, and a Masters in Accountancy from the Kenan-Flagler Business School UNC Chapel Hill.



DANIEL MACDONALD, CFA

Head of Advisory & Pensions, Middlemark Partners

Daniel MacDonald is the Head of Advisory and Pensions at Middlemark Partners. Previously, Mr. MacDonald spent sixteen years with Ontario Teachers' Pension Plan Board (OTPP), where he was responsible for manager selection, portfolio construction, and investment due diligence, among other duties. He successfully managed a portfolio of hedge fund managers that covered a diverse range of liquid strategies, including Equity Long/Short, Systematic Equity, Event-Driven Equity, Managed Futures, and Alternative Beta/Smart Beta/Low Cost Generics. Prior to OTPP, Daniel worked for Citibank Canada, as a Manager in the Equity Derivatives department. Previously, Mr. MacDonald served as a Credit Analyst at IBM Canada. Mr. MacDonald received an LL.B from York University's Osgoode Hall Law School, an MBA from York University's Schulich School of Business, and a BBA from York University. He is also a Chartered Financial Analyst (CFA).



JAMES MCKENNA

Director of Investment Solutions, Camden Asset Management, L.P.

Jim joined Camden Asset Management in September 2019 as Director of Investment Solutions and is responsible for new capital raising. Camden is an SEC-registered investment adviser founded in Los Angeles in 1991, offering transparency, investor alignment and a commitment to achieving consistent excess returns over client-selected benchmarks for institutional investors. Prior to joining Camden, Jim most recently led Business Development for State Street's InfraHedge managed account services group from 2015 to 2019. From 2011 to 2014 he was a Partner and Managing Director at HedgeMark Advisors - a managed account platform startup acquired by BNY Mellon - and as Head of Business Development for EMEA and APAC was instrumental in increasing the enterprise value of the business. Previously, Jim was employed by Société Générale in multiple hedge fund derivatives roles, first based in Paris as European Head of Relationship Management within their Lyxor Asset Management division, and later as an Executive Director for Business Development in London and New York. Jim has over two decades of buy and sell-side experience in the alternatives space and received a Bachelor of Science degree in Economics from The Pennsylvania State University.

SPEAKER BIOS



RYAN O'GRADY

Chief Executive Officer, ROW Asset Management

Ryan O'Grady is the Chief Executive Officer and a Founding Principal at ROW Asset Management. At ROW, Ryan is the Chairperson of the Research Committee, and co-Chair of the Investment Committee. Prior to co-founding ROW Asset Management in July 2010, Ryan was the Head of Investment Research at FX Concepts from 1999 to 2009. Ryan also served as Manager of New Model Research and as Portfolio Manager at FX Concepts from 1993 to 1999, and as an assistant trader from 1992 to 1993. Ryan started his career in quantitative financial research at the age of 17, as an intern at Neuberger Berman. Ryan has a B.A. in Economics from The Johns Hopkins University, and an M.S. in Statistics and Operations Research from the Stern School of Business at New York University. He also completed coursework toward a PhD in Economics at the University of California, Irvine. Ryan is one of the founding members of the Industry Advisory Board for the UCLA Anderson School of Management Masters' in Financial Engineering Program and continues to serve on the Board.



JONATHAN PLANTÉ, CAIA

Manager, Business Development & Investor Relations, Innocap

Jonathan Planté is Manager of Business Development and Investor Relations at Innocap, which he joined in 2013. In addition, he currently lectures at HEC Montréal, where he teaches hedge funds to graduate students. During his 10 years in the alternative investment industry, M. Planté held various positions in both Europe and North America. His qualifications include a graduate degree in Finance from HEC Montréal, a master's degree in international business development from EM Lyon group as well as the CAIA designation.



JUDITH POSNIKOFF, PHD

Managing Director, Martlet Asset Management

Judith Posnikoff is a Managing Director at Martlet Asset Management, LLC. Her responsibilities include being the Head of Risk Management and Chief Compliance Officer. Judy was a founding partner at PAAMCO where she was involved in all aspects of the firm's investment process throughout the years from identifying investment opportunities to working on portfolio construction and risk management. Judy has authored numerous publications in the area of alternative investments and has taught at the University of California, Riverside and Irvine and at California State University, Fullerton. Judy was a member of the founding board of directors of the Association of Women in Alternative Investing (AWAI) and is on the global boards of 100 Women in Finance and the CAIA Foundation. She also chairs the scholarship committee of the 100 Women in Finance Institute.

SPEAKER BIOS



ANUJ A. SHAH

Managing Director, KKS Advisors

Anuj is a Managing Director for KKS Advisors, an advisory firm focused on sustainability strategy whose vision is to reshape markets. He is based in Boston, MA and leads business development and operational activities in the US with a focus on ESG and impact investing integration, impact measurement, and sustainability strategy for corporations. Anuj also works with the global KKS team on strategic planning, program development, and thought leadership. Prior to KKS, Anuj was the Founder and Managing Director of Linear Impact Partners, a boutique strategic advisory firm that developed sustainable investing strategies and solutions aimed at mobilizing more capital towards positive social and environmental outcomes. His client work was primarily focused on the integration of impact investing business models, product design and distribution, and investor education and engagement. Before founding Linear Impact Partners, Anuj was the Head of Strategy and Business Management for the Private Wealth Management business of Morgan Stanley. His responsibilities there spanned the ultra-high-net-worth client segment and included formulating growth strategies, identifying industry trends and responding to disruption, producing data analytics to inform and drive insights, developing brand and content marketing efforts, and maximizing ROI through the efficient allocation of resources. Through his work in previous roles at Morgan Stanley, Lehman Brothers and Bankers Trust, Anuj has gained experience in post-M&A integration, portfolio analysis and reporting, and financial product structuring and management. Anuj currently serves as an Advisor at BonBillo, an incubator program for startups using technology to advance the UN Sustainable Development Goals. He was previously Treasurer and on the Board of Directors of Page 73 Productions and was a member of the Executive Committee of the Alumni Association of the School of International and Public Affairs at Columbia University. He is also a former member of the Advisory Board of 118 Capital, an impact investing fund focused on underprivileged groups in the Americas. Anuj earned a Master of International Affairs degree with concentrations in International Financial Policy and South Asia from Columbia University and a Bachelor of Science degree in Finance from Boston College. He resides with his wife and son in Cambridge, Massachusetts.



SHARIF SIDDIQUI

Director of Investments, The James Irvine Foundation

Sharif Siddiqui joined the Foundation as a Director of Investments in June 2017. He began his career as an Investment Banking Analyst at Merrill Lynch & Co., in New York, NY, followed by an investment position at the Gordon and Betty Moore Foundation in San Francisco. Sharif then moved to Chicago and joined Citadel Investment Group's global equities group. From 2006 to 2013, he was part of an eight-person team managing a \$5 billion equity long/short portfolio, and he personally managed a \$1 billion market-neutral long/short equity portfolio for four of those years. In 2013, Sharif founded Alpenglowl Capital, a \$300 million long/short equity fund focused on the financial and real estate sectors. Sharif graduated with honors from Carnegie Mellon University, where he played varsity soccer. He holds a Master of Business Administration from the Kellogg School of Management at Northwestern University. An active outdoor enthusiast, Sharif worked for one year as an Americorps volunteer in Alaska, where he built trails in national parks with at-risk youth. He has climbed Mt. Kilimanjaro, Mt. Fuji, Mt. Rainier, and Mt. Everest where he ascended to Kala Patthar.

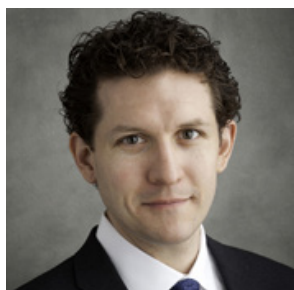
SPEAKER BIOS



RAFAEL SILVEIRA, PHD

Executive Director – Head of Client Solutions North America, LGT Capital Partners

Rafael is Executive Director, Head of Client Solutions, North America, for LGT Capital Partners. Rafael is responsible for further developing the firm's North America footprint and leading mandate operations as LGT expands its investment offering and delivers customized portfolios to Institutions and Advisors across the US, Canada and Latin America. Before joining LGT in 2019, Rafael was a portfolio manager and product specialist at AQR Capital Management. Prior, Rafael worked at J.P. Morgan Asset Management, Multi Asset Solutions, where he was responsible for designing portfolios for institutional clients, and Bank of America as senior economist and quantitative financial analyst. Over the course of his career, Rafael has become an accomplished investment manager, researcher and trusted advisor who has worked with some of the leading global institutional investors on their private and public investment strategies. Rafael graduated from the University of Pennsylvania with a Ph.D. and a Masters of Science degrees in Economics with focus on Quantitative Finance. Rafael lives in Old Greenwich, CT together with his wife and daughter.



CHRIS SOLARZ, CFA, CPA, CAIA

Managing Director, Cliffwater LLC

Chris is a Managing Director at Cliffwater LLC covering global macro and relative value strategies on the hedge fund research team. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets. He earned a BA in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 7 Guinness World Records, and has run marathons on all 7 continents and in all 50 US states.



AMIT THANKI, CAIA

Senior Investment Officer, San Bernardino County Employees Retirement Association

Mr. Thanki is a Senior Investment Officer with the San Bernardino County Employees' Retirement Association (SBCERA). As a member of the investment team, he oversees the deployment of \$2.5 billion in pension assets across multiple strategies with a focus on value, contractual income, and relationship structuring. Prior to joining SBCERA in April 2012, Mr. Thanki was an Investment Analyst at Orange County Employees' Retirement System (OCERS) where he was responsible for the oversight of the hedge fund, public equity, and public fixed income portfolios. He started his investment career at PIMCO as a member of the marketing and business development group focusing on fixed income strategies in emerging markets, high yield and structured credit. Mr. Thanki has over sixteen years of experience in the investment management industry and received the Money Management Intelligence 2013 Rising Star of Public Funds award. He earned his MBA from the Paul Merage School of Business at the University of California, Irvine and has a BS in Business Management from Oklahoma State University. Additionally, Mr. Thanki is a Chartered Alternative Investment Analyst (CAIA) charter holder and a member of the CAIA Association.

SPEAKER BIOS



ROB VANDERPOOL

President, InfraHedge North America, and Managing Director, State Street Global Services, Alternative Investment Solutions

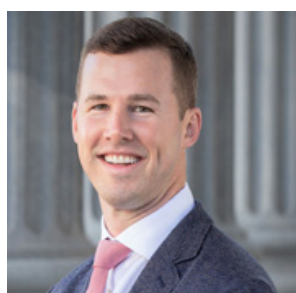
Rob is the President of InfraHedge North America and has over 18 years' experience in the financial services and asset management industry. He leads our relationship management and business development functions globally. Prior to joining InfraHedge in 2018, Rob was in the Chief Investment Office as Head of Investment Product at Northern Trust responsible for over \$280b of Northern Trust's investment platform. As Head of Investment Product, Rob was in charge of the construction and management of the Investment Platform including internal and external investment manager products. In addition, Rob previously was Global Head of Valuations which entailed in depth credit research, financial modelling and quantitative analysis to Equity, Fixed Income and Alternative portfolio Managers. Rob sat on the firms' Investment Advisory Committee, Investment Governance Committee, Centrally Managed solutions Committee, ESG Council and Commissions & Trading Committee. Previously, Rob worked at PIMCO on the Fund Statistics team in Newport Beach, CA and AVM, a \$5.2B hedge fund invested in fixed income arbitrage, long/short credit and tail hedging and volatility strategies. Rob's broad executive responsibilities involve developing long-term strategy, executing operating plans, managing client and vendor relationships and developing and retaining talented professionals. Rob holds a Bachelor of Science from St. Michael's College, a Statistics and Operations Program from the Massachusetts Institute of Technology and a MBA from University of Chicago - Booth School of Business.



BASIL WILLIAMS

Chief Executive Officer, Welton Investment Partners

Mr. Williams serves as Welton's CEO and is based out of the firm's New York office. He possesses a deep general management experience as a 30+ year industry leader in investment management. Mr. Williams is a proven investor in alternative strategies having traded a broad suite of relative value strategies during his 20 years at Concordia Advisors. Moreover, he possesses C-suite experience having built and led hedge fund businesses at Concordia and Mariner Investment Group. Prior to joining Welton, Mr. Williams was the Head of Portfolio Management at PAAMCO, one of the largest alternative allocators and emerging manager investors. He has been a regular speaker at industry conferences, and authored articles on topics ranging from monetary policy, risk management, technology and hedge fund management. Mr. Williams' not-for-profit service includes President of the Board of Elisabeth Morrow School, Finance Committee Member of the Dwight Englewood School, and Trustee of the Portsmouth Abbey School. He earned an MBA from the NYU Stern School of Business, and a BA in Applied Mathematics (Summa Cum Laude) from Brown University.



JUSTIN YOUNG, CAIA

Senior Investment Officer, South Carolina Retirement System Investment Commission

SPEAKER BIOS



THOM YOUNG

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Mr. Young is responsible for strategic direction of FARcapital, LLC, an independent incentive compensation administration company. Mr. Young's emphasis is on sales to the founders and partners at US hedge fund management companies and to the global institutional investor base. FARcapital, LLC pioneered the use of Fund Alignment Rights, FARs, as incentive compensation between US hedge fund managers and their institutional investors. FARs are fair market value stock options granted annually on fund shares to the management company in lieu of today's Carried Interest. FARs are analogous to stock options granted on company shares to executives in Silicon Valley in order to align the executives' economic incentive with the long-term interests of their shareholders, and as currency to attract and retain key talent. These options participate in the stock's performance side by side shareholders, not taxable until the executives/employees choose to exercise. Using FARs, US hedge fund managers can choose to leave crystallized incentive compensation invested in the fund on a pre-tax basis to participate in the gross performance of the fund, tax deferred until they choose to exercise. Investors realize greater alignment. Using FARs, US hedge fund managers can choose to leave crystallized incentive compensation invested in the fund on a pre-tax basis to participate in the gross performance of the fund, tax deferred until they choose to exercise. Investors realize greater alignment. FARcapital, LLC provides design, implementation and administration of Fund Alignment Rights (FARs) plans and the "back to back" partner and employee incentive compensation plans. Prior to joining the FARcapital, LLC, Mr. Young co-founded and managed Cambium Capital Management, a conservative Jones model US equity long/short hedge fund. Before Cambium, Mr. Young worked as a Managing Director of Deutsche Bank in New York serving in several roles to include as a Global Relationship Manager and as Co- Head of Global Institutional equity sales. In 1997 Mr. Young opened and managed Deutsche Bank's institutional office in Atlanta, Georgia. From 1996 Mr. Young worked at The First Boston Corporation in New York and Atlanta. While in Atlanta, he covered the Southeast's largest public pension plans, major endowments, and foundations. Mr. Young has served on the Boards of the Mint Museums of Charlotte. Mr. Young is past treasurer of the Echo Foundation and past President of the Ne Ultra Society of Davidson College. Mr. Young earned his MBA from the University of Virginia Darden School and his undergraduate degree from Davidson College.

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