

ALTERNATIVE INVESTING SUMMIT



DECEMBER 8-10, 2021



DANA POINT, CA



Opal Group

WEDNESDAY, DECEMBER 8, 2021

7:40AM-12:00PM	Golf Outing at Monarch Beach
10:00AM-12:00PM	Exhibit Set-Up
10:00AM	<p>Registration/Information Desk Opens</p> <p>All confirmed pre-registered delegates must approach the Registration Desk to check in and pick up conference badges. Business Cards are required to retrieve badges.</p>
LOCATION	GENERAL SESSION
12:40PM-12:45PM	Chairman Welcoming Remarks
12:45PM-1:30PM	<p>KEYNOTE DISCUSSION: Measuring the Winds of Change - State of the Economy and State of Geopolitical Affairs</p> <ul style="list-style-type: none"> • Overview of 2020 & 2021 • What to expect in 2022? • China vs. USA? • Cybersecurity Attacks on the Rise • Top Geopolitical Risks <p><u>Moderator:</u> James Rosebush, Chief Executive Officer, Intersection Impact Fund/The Wealth and Family Office Management Group (SFO)</p> <p><u>Panelists:</u> Michael Ashley Schulman, CFA, Partner / Chief Investment Officer, Running Point Capital Advisors</p>
1:30PM-2:30PM	<p>Non-Correlated & Niche Fund Strategies and Sectors that Help with Diversification Efforts</p> <p><u>Moderator:</u></p> <p><u>Panelists:</u> TBA, Altera</p>

2:30PM-2:50PM	Standalone Presentation
2:50PM-3:10PM	Standalone Presentation Alan Solon, Chairman & CEO, EcoVest Capital
LOCATION	EXHIBIT HALL
3:10PM-3:30PM	Networking Refreshment Break <i>Sponsored by:</i>
3:30PM-4:10PM	<p>LP Investment Officer Perspectives: Best Practices in Sourcing Opportunities & Due Diligence in Today’s Market</p> <ul style="list-style-type: none"> • What is your process for securing new investments? How do you manage them? • Do you invest directly, with other families or through sponsors? • What does your investment criteria look like? • What are pros and cons of the OCIO model vs. multi-family office model? • What are some deals that you have turned down, and why? • Are you getting the returns you expected? Or are you having to adjust your strategy? • What is in your pipeline? Are you looking to increase the number or size of deals? • How are you using technology to close more deals? • What are the characteristics of a smart deal? What are telltale signs of a not-so-smart deal? • What resources do family offices rely on for conducting due diligence? • How do family offices vet fund managers? <p><i>Moderator:</i></p> <p><i>Panelists:</i></p>
4:10PM-5:10PM	<p>Private Credit, Debt and Direct Lending: Where Can Investors Find Yield?</p> <p><i>Moderator:</i> Cian Desmond, Vice President, Portfolio Manager - Alternative Investments, Wilshire Associates</p> <p><i>Panelists:</i> Rob Sechrist, President, Pelorus Equity Group, Inc Chris Christensen, JD, MIB, CEO, iCap Equity, LLC Zack Ellison, Managing General Partner, Applied Real Intelligence LLC</p>

5:10PM-5:50PM	<p>ESG and Impactful Investment Strategies</p> <p><i>Moderator:</i></p> <p><i>Panelists:</i> Carlos Ochoa, General Partner, A18 Ventures</p>
5:50PM-6:30PM	<p>Keynote Presentation: Building and Investing in Diversity, Equity & Inclusion within Investment Management</p> <p><i>Moderator:</i></p> <p><i>Panelists:</i></p>
LOCATION	EXHIBIT HALL
6:30PM-7:30PM	<p>Networking Cocktail Reception <i>Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day.</i></p>

THURSDAY, DECEMBER 9, 2021

8:00AM	<p>Registration/Information Desk Opens <i>All confirmed pre-registered delegates must approach the Registration Desk to check in and pick up conference badges. Business Cards are required to retrieve badges.</i></p>
LOCATION	EXHIBIT HALL
8:00AM-9:00AM	<p>Continental Breakfast <i>Sponsored by:</i></p>
LOCATION	GENERAL SESSION
9:00AM	Opening Remarks
9:10AM-9:30AM	<p>Keynote Presentation</p> <p><i>Presented by:</i></p>
9:30AM-10:00AM	<p>Capitalizing with Cannabis Investing The Cannabis Industry is experiencing an explosion; domestically, globally, culturally, financially, and therapeutically. Join this diverse and knowledgeable panel to gain insights into investment opportunities, risk mitigation, and future expectations.</p>

	<p><u>Moderator:</u></p> <p><u>Panelists:</u></p>
10:15AM-10:35AM	<p>Standalone Presentation</p> <p>TBA, Triton Pacific Securities, LLC</p>
10:35AM-10:55AM	<p>The Emerging Role of Crowdfunding in CRE Investing</p> <p>Aaron Halfacre, CEO, Modiv</p>
10:55AM-11:15AM	<p>Standalone Presentation</p> <p>TBA, Captive Alternatives</p>
11:15AM-11:35AM	<p>Networking Refreshment Break</p> <p><u>Sponsored by:</u></p>
11:35AM-12:10PM	<p>Real Estate Investing: Building and Rebalancing Your Portfolio</p> <p><u>Moderator:</u> James Solomon, Principal, Ravinia Capital Group (SFO)</p> <p><u>Panelists:</u> Bradley Baker, Managing Director, Wilshire Consulting Gregory Kraut, Founder & Managing Partner, KPG Funds</p>
12:10PM-12:50PM	<p>Global Private Equity and Venture Capital Investing Outlook</p> <p><u>Moderator:</u> Tim Rafalovich, Senior Vice President of Private Equity, Wells Fargo</p> <p><u>Panelists:</u></p>
12:50PM-2:00PM	<p>Networking Luncheon</p>
2:00PM-2:40PM	<p>Investing in Cutting Edge and Innovative Technologies: Direct and Co-Investment Opportunities</p> <p>Advances in technology and the sea of data have changed the way we live, work, and conduct business. The magnitude of social & technological change has impacted most, if not all, industries. What can investors do to help ensure these companies have the capital and resources needed to build successful companies for the future?</p>

	<p><u>Moderator:</u> Thomas Haug, Chief Executive Officer, Managing Member, Aspen Tree Advisory</p> <p><u>Panelists:</u></p>
2:40PM-3:00PM	<p style="text-align: center;">Standalone Presentation</p> <p style="text-align: center;">Gary Gentges, SVP Corporate Development, Kineta, Inc.</p>
3:00PM-3:40PM	<p>Investing in Digital Assets and Building on the Blockchain</p> <p><u>Moderator:</u></p> <p><u>Panelists:</u></p>
3:40PM-4:20PM	<p>Hedge Funds and The Rebirth of Active Management: No Place like Hedge?</p> <p><u>Moderator:</u> John Moore, CFA, Managing Partner and Chief Investment Officer, Harpwell Capital Advisors, LLC, Managing Partner, Maine Medical Center</p> <p><u>Panelists:</u></p>
4:20PM-5:00PM	<p>International & Emerging/Frontier Market Strategies: Where Should You Be Investing and Where is Future Growth?</p> <p><u>Moderator:</u></p> <p><u>Panelists:</u> David Mullings, Chairman & CEO, Blue Mahoe Capital Partners</p>
5:00PM-5:40PM	<p>KEYNOTE PANEL Professional Athlete Innovators and Influencers Deliver Greater Investor Returns and Partners in Impact to the Alternative Investing Community</p> <p><u>Moderator:</u> Daniel Hughes, Founder/Co-Creator of Athletes Influence, Partner, LOHAS Advisors</p> <p><u>Panelists:</u></p>
LOCATION	EXHIBIT HALL

5:40PM-6:40PM

Networking Cocktail Reception

Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day.

FRIDAY, DECEMBER 10, 2021

8:30AM	Registration/Information Desk Opens
8:30AM-9:30AM	Continental Breakfast <i>Sponsored by:</i>
LOCATION	GENERAL SESSION
9:15AM	Opening Remarks
9:20AM-10:00AM	Portfolio & Investment Risk: What Are You Ignoring? <i>Moderator:</i> <i>Panelists:</i>
10:0AM-10:30AM	SPAC's vs Traditional IPO's <i>Moderator:</i> <i>Panelists:</i>
10:30AM-11:15AM	You Can Have It All: Sustainable Returns and a Sustainable Future <i>Moderator:</i> <i>Panelists:</i>
11:15AM	Conference Concludes

2021 CONFIRMED PARTICIPANTS

Family Offices and Private Wealth Advisors

Principal, Kim Family Trust (SFO)

Principal, Pollack Family Investments (SFO)

Chief Executive Officer, Intersection Impact Fund/The Wealth and Family Office Management Group (SFO)

Chief Investment Officer, Croft Investments Limited Partnership (SFO)

Trustee, Dains–Lingle Family Trust

President, Pivotal Advisors

Managing Partner, Pointu Holdings LLC (SFO)

Managing Director, Dorado Peak (SFO)

Chief Executive Officer, Managing Member, Aspen Tree Advisory

Chief Executive Officer, Ferguson Family Office (SFO)

Member, Capital Family Office (SFO)

Investor, Berkeley Angel Network

Investment Administrator, Grider Family Trust (SFO)

Executive Vice–President, Slick Enterprises, Inc. (SFO)

President & Chief Investment Officer, Heirloom Investment Management

CIO, Wadhvani Family Office (SFO)

Senior Managing Partner, ROSC Global Investments (SFO)

Principal, Ravinia Capital Group (SFO)

Managing Director – Acquisitions, Ravinia Capital Group

Pension Funds

Trustee, Oakland Police and Fire Retirement System

Trustee, City of Tampa Fire & Police Pension Fund

Consultants

President, SECAP Group

Managing Director, Wilshire Consulting

Endowments and Foundations

Chief Investment Officer, Lebanese American University

President, The Arthur Lambert Foundation / First Republic Bank

Board & Investment Committee Member, Rhode Island College Foundation

President, Laguna Woods United Methodist Foundation Inc.

