



Wharton 2025
Private Equity & Venture Capital Conference

Wharton Private Equity
& Venture Capital Conference 2025

Resilience & Innovation: Navigating a Shifting Economic Landscape

Friday, April 4, 2025 · New York Athletic Club



Wharton
UNIVERSITY of PENNSYLVANIA

STUDENT
INITIATIVE

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About the Conference

The Wharton Private Equity & Venture Capital Conference is one of Wharton's largest and longest running student-led conferences, bringing together over 400 industry professionals, students, and alumni each year since its inception in 1997. This year's keynote speakers are Howard Marks, Co-founder and Co-chairman of Oaktree Capital Management and Bill Ackman, Founder and CEO of Pershing Square. The 2025 conference theme, "Resilience & Innovation: Navigating a Shifting Economic Landscape", explores how investors are responding to dynamic market conditions influenced by political changes, technological advancements, and macroeconomic pressures. Through a curated agenda of keynote speeches, panel discussions, and networking sessions, participants will have the opportunity to engage with industry experts on the trends, challenges, and opportunities shaping the future of private equity and venture capital.

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Agenda

8:00 AM–9:00 AM	Breakfast (9th floor card room)		
9:00 AM–10:00 AM	Opening Remarks & Keynote Howard Marks, CFA - Co-Founder & Co-Chairman, Oaktree Capital Management (9th floor lounge)		
10:05 AM–10:55 AM	Sports (10th floor President's room)	Private Credit (10th floor Olympics 1 & 2)	PE Operations (10th floor Olympics 4 & 5)
10:55 AM–11:15 AM	Networking Break (10th floor Olympic 3)		
11:20 AM–12:10 PM	Venture Capital (10th floor President's room)	Secondaries (10th floor Olympics 1 & 2)	Real Estate (10th floor Olympics 4 & 5)
12:10 PM–1:00 PM	Networking Lunch (11th floor main dining room)		
1:05 PM–1:55 PM	Large-Cap Buyouts (10th floor President's room)	Defense (10th floor Olympics 1 & 2)	Middle Market Buyouts 10th floor Olympics 4 & 5)
1:55 PM–2:15 PM	Networking Break (10th floor Olympic 3)		
2:20 PM–3:10 PM	Infrastructure (10th floor President's room)	Special Situations (10th floor Olympics 1 & 2)	Growth Equity (10th floor Olympics 4 & 5)
3:10 PM–3:30 PM	Networking Break (10th floor Olympic 3)		
3:35 PM–4:25 PM	Technology & AI (10th floor President's room)		Breaking into PE/VC (10th floor Olympics 1 & 2)
4:30 PM–5:30 PM	Closing Keynote & Networking Reception Bill Ackman - Founder and CEO, Pershing Square (9th floor lounge & card room)		

A decorative header featuring a complex geometric pattern of overlapping triangles in various shades of blue, ranging from light to dark. This pattern occupies the top third of the page.

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Keynote Speakers

Opening Keynote

🕒 9:00 AM–10:00 AM 📍 9th floor lounge



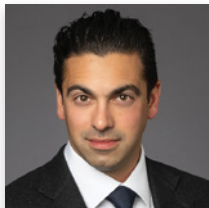
Howard Marks, CFA

Co-Founder & Co-Chairman

Oaktree Capital Management

Mr. Marks is co-founder and co-Chairman of Oaktree, where he spends most of his time determining and communicating regarding the firm's strategic posture. In addition to leading Oaktree, he is well known for the "memos to Oaktree clients" he has written over the last 33 years and his books, *The Most Important Thing* (2011) and *Mastering the Market Cycle* (2018). Mr. Marks holds a B.S.Ec. degree cum laude in finance from the Wharton School and an M.B.A. in accounting and marketing from the Booth School of Business of the University of Chicago. He is a CFA® charterholder; Trustee and Advisory member of the Investment Committee of the Metropolitan Museum of Art; member of the Investment Committee of the Royal Drawing School in London; and Emeritus Trustee of the University of Pennsylvania, where from 2000 to 2010 he chaired the Investment Board.

Howard Marks, CFA will be interviewed by Hamed Meshki



Hamed Meshki

Partner

Kirkland & Ellis

Hamed Meshki is a partner in Kirkland's Los Angeles corporate group. His practice focuses on highly structured and complex business transactions, including mergers & acquisitions, leveraged buyouts, restructurings, recapitalizations and financings. Hamed has structured, negotiated and completed transactions in a wide variety of industries, including apparel, broadcast media, consumer products, energy and oilfield services, gaming and lodging, healthcare, industrials and manufacturing, publishing, software and technology, sports and entertainment, and transportation and shipping.

Closing Keynote

🕒 4:30 PM–5:30 PM 📍 9th floor lounge & card room



Bill Ackman

Founder and CEO

Pershing Square

Bill Ackman is the CEO of Pershing Square Capital Management, L.P. which he founded in 2003. He is a member of the board of Universal Music Group N.V. (NA:UMG).

He serves as a member of the Investor Advisory Committee on Financial Markets for the Federal Reserve Bank of New York and as a member of the Board of Dean's Advisors of the Harvard Business School.

Mr. Ackman is co-trustee of The Pershing Square Foundation, part of Pershing Square Philanthropies, that bets on innovative leaders solving humanity's big societal, environmental, and health challenges.

Bill Ackman will be interviewed by Tushar Mittal



Tushar Mittal

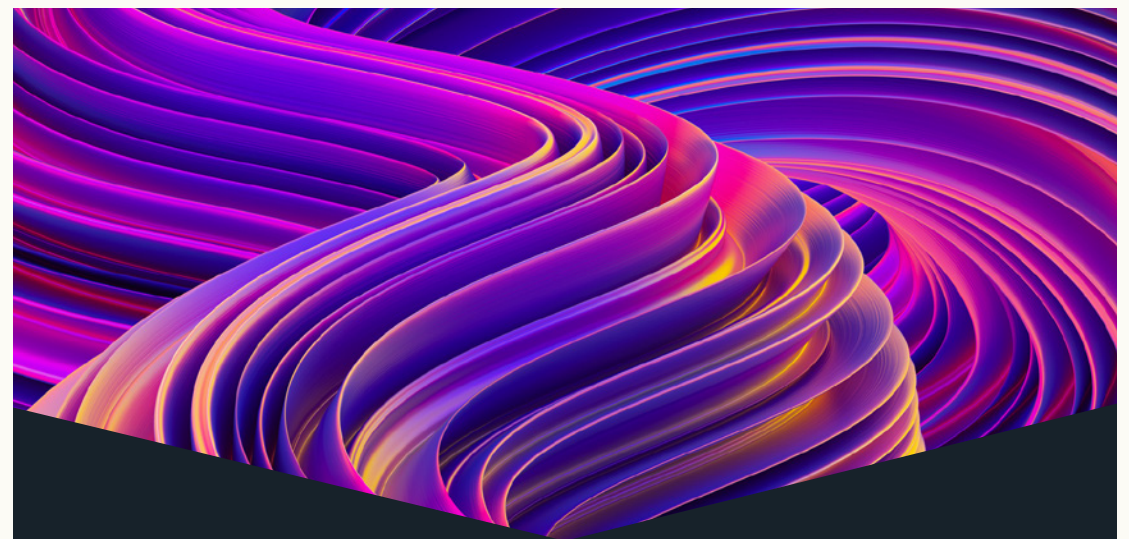
Co-Chair - Keynote & Panels

Wharton PE/VC Conference 2025

Tushar is a second-year MBA student at The Wharton School. He currently serves as the Co-Chair of the Wharton PE/VC Conference and Co-President of the Wharton Sports Business Club.

Prior to Wharton, he worked at J.P. Morgan in London across 4 different roles in 4 years in the Office of the CFO. Most recently, he was an Associate in the ESG Regulatory Implementation & Disclosures team, leading key initiatives - such as the publication of the EU sustainable taxonomy disclosure - within the firm's growing portfolio of ESG regulatory reporting programs in the EU. At Wharton, Tushar has been exploring his interest at the intersection of sports and investing and spent his MBA summer working as an Investment Banking Summer Associate at Morgan Stanley in the Infrastructure and Real Estate coverage groups.

Tushar graduated from the London School of Economics (LSE) in 2019 with a BSc in Management and is a professionally qualified CIMA accountant.



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Panels

Sports

🕒 10:05 AM–10:55 AM

📍 10th floor President's room



Josh Empson

Partner

Sixth Street

Mr. Empson is a Partner of Sixth Street based in New York and Co-Head of Sports, Media & Entertainment. Prior to joining Sixth Street, he was CEO of Tempo Music Investments, an intellectual property investment platform owned by Providence Equity Partners. Prior to Tempo, Empson was a Managing Director at Providence, where he led that firm's investments in Soccer United Marketing (MLS), Learfield Sports, and Real Madrid, among others. Earlier in his career, Empson was a Managing Director at Forstmann Little, where he helped lead that firm's landmark investment in IMG prior to its sale to WME/Endeavor. Mr. Empson received a B.A. from Princeton University.



Colin Neville

Partner

Raine

Colin Neville is a Partner at Raine and joined the firm at its inception in 2009. Colin leads Raine's sports practice, overseeing its principal investing and advisory efforts in the space.

Colin has helped lead Raine's investments in DraftKings, Olo (where he serves on the board of directors), Premier Lacrosse League, Beachbody, Zumba Fitness and Jagex. He has worked on a variety of advisory assignments across the global sports landscape, including the sale of Chelsea Football Club, the sale of the UFC to Endeavor, City Football Group's sale of minority interests to Silver Lake and China Media Capital, DraftKings' combination with Diamond Eagle and SBTech, Joe Tsai's acquisition of the Brooklyn Nets and Barclays Center, Fanatics capital raise from the NFL and MLB, Steve Ballmer's purchase of the Los Angeles

Clippers, the acquisition of Inter Miami CF, the sale of DC United, FC Cincinnati's sale of minority interest to Meg Whitman, WME's acquisition of IMG and Flash Entertainment's purchase of a minority stake in the UFC. Colin works extensively with leagues and teams, as well as technology, data services and media companies across the sports landscape.

In 2015, the M&A Advisor recognized Colin as a 40 Under 40 Emerging Leader in the Dealmaker Category and in 2016, 2022, and 2023 Sports Business Journal named him a recipient of its Forty Under 40 Award.

Prior to joining Raine, Colin worked in the Mergers and Acquisitions group at Bank of America Merrill Lynch with a focus on TMT. He has a B.A. in Political Science from Yale University and is a former Division 1 athlete.



Jordan Solomon

Partner

Arctos Partners

Jordan L. Solomon is a Partner at Arctos Partners. In addition to his investment responsibilities, Mr. Solomon leads value-creation, sourcing, executing and managing investments for the Sports strategy.

Prior to co-founding Arctos Partners, Mr. Solomon served as Executive Vice President of MSG Sports at the Madison Square Garden Company, where he was responsible for MSG's \$700 million annual sports business operations, including the New York Knicks (NBA) and New York Rangers (NHL). Mr. Solomon led commercial strategy for the teams, including sponsorships, ticketing, marketing, merchandizing, venue operations and analytics. He also interfaced with league executives of the NBA, NHL, and NBA G-League. Mr. Solomon was responsible for evaluating acquisitions for MSG Sports. Under Mr. Solomon's leadership, MSG Sports grew revenue and operating profits, grew direct to consumer ticket sales, and enhanced the fan experience through stadium renovations.

Mr. Solomon joined MSG from the NBA, where he was Vice President of Team Marketing and Business Operations, the internal consulting

group of the NBA. In this role, he advised team owners and executives on strategies and tactics to increase team revenues and profitability. Mr. Solomon also led TMBO's strategy and analytics group, which provided analytical insights on ticket pricing, retention modeling, and customer segmentation to all NBA teams.

Prior to the NBA, Mr. Solomon was an Associate Principal at McKinsey & Company in the Asset & Wealth Management and Sales & Marketing Practices. At McKinsey, Mr. Solomon advised senior executives on strategy, sales and marketing, and operations, and conducted due diligence for private equity firms. He served clients in the sports, media and entertainment, gaming and financial services industries. Mr. Solomon started his career with SVB Capital, where he was a Director of the Venture Capital Group and worked to launch SVB's first fund of funds and venture capital fund.

Mr. Solomon graduated with distinction from the University of Wisconsin – Madison with a BA in Economics and International Relations. He received his MBA from the Tuck School of Business at Dartmouth College and an MPA from the John F. Kennedy School of Government at Harvard University. In 2018, Mr. Solomon was named a Forty Under 40 honoree by the Sports Business Journal.



Rob DiGisi

Entrepreneur and Lecturer

The Wharton School

(Moderator)

As both a senior corporate executive and entrepreneur, Rob DiGisi's expertise in the sports business comes from three decades of building brands, driving revenue and delivering breakthrough marketing solutions. He has created new profit centers, customer engagement channels and brand development platforms for organizations including start-ups, pro-sports leagues and multi-billion dollar corporations.

Rob's pedigree combines experience at the NBA, IMG, Bank One and Diamond Resorts International and through his consulting and entrepreneurial venture firm, Iron Horse Marketing. Since 2018, he has leveraged his experience, thirst for knowledge, ability to lead strategic debate and interest in mentoring young executives to teach sports business courses to both undergraduate and MBA students at The Wharton School of the University of Pennsylvania. Professional associations, investment firms and other organizations connected to the sports industry often bring in Rob as a featured speaker.

Rob is a graduate of Boston College and earned an MBA from The Wharton School. A father of two, he and his wife live in Northern New Jersey.

Private Credit

🕒 10:05 AM–10:55 AM 📍 10th floor Olympics 1 & 2



Vikas Keswani

Managing Director

HPS Investment Partners

Mr. Keswani is a Managing Director at HPS Investment Partners and Head of North American Specialty Lending. Prior to joining HPS in 2010, Mr. Keswani spent a majority of his career at BlackRock, where he was a part of the initial team that established, structured and capitalized BlackRock Capital Investment Corporation (NASDAQ: BKCC), a publicly traded private investment vehicle. Mr. Keswani is a CFA charterholder and holds a BSE from The Wharton School at the University of Pennsylvania where he graduated Magna Cum Laude.



Jana Markowicz

Partner, Chief Operating Officer, US Direct Lending

Ares

Ms. Markowicz is a Partner and Chief Operating Officer of Product Management & Investor Relations for U.S. Direct Lending in the Ares Credit Group. She also serves as Chief Operating Officer of Ares Capital Corporation and Ares Strategic Income Fund. She may from time to time serve as an officer, director or principal of other entities affiliated with Ares Management or investment funds managed by Ares Management and its affiliates. Prior to joining Ares in 2005, Ms. Markowicz was an Analyst in the Leveraged Finance Group at Citigroup (formerly Salomon Smith Barney), where she focused on financings for companies across a broad range of industries. Ms. Markowicz holds a B.S. from the University of Pennsylvania in Engineering, with a concentration in Economic and Financial Systems.



Patrick Raab

Managing Director

Apax

Patrick Raab is a Managing Director. He joined Apax in 2015 and is based in New York. Patrick was the first employee in the Apax Credit team. He started his career in the Apax European offices but moved over to oversee the day to day activity of Apax Credit in the beginning of 2023.

Prior to joining Apax, Patrick was an Investment Professional in Värde Partners' Liquids team in London, where he invested in European distressed situations. Prior to that, he worked in Omers' Infrastructure investment team in London after starting his career in 2010 in Citigroup's Merger and Acquisitions advisory team in Frankfurt.

Patrick holds a B.Sc. from European Business School Oestrich-Winkel, Germany.



Paul Sandler

Partner

Kirkland & Ellis

(Moderator)

Paul Sandler is a debt finance partner in the New York office of Kirkland & Ellis LLP. Paul advises private equity sponsors, investment funds, borrowers and creditors on restructurings, financings and liability management transactions, opportunistic credit investments and acquisition financings. His practice focuses on distressed transactions in particular, and he has extensive experience advising some of the world's largest investors on complex credit solutions.

PE Operations

🕒 10:05 AM–10:55 AM 📍 10th floor Olympics 4 & 5



Connor McGauley

Principal, Portfolio Operations

GI Partners

Connor McGauley is a Principal, Portfolio Operations at GI Partners. He works with portfolio companies to accelerate growth and drives market diligence for potential investment. Mr. McGauley is on the boards of Bluepeak, Blue Stream Fiber, and Clinical Ink. Prior to joining GI Partners, he was the Vice President of Analytics and Patient Engagement for US Anesthesia Partners, a Welsh Carson Anderson and Stowe portfolio company. Prior to US Anesthesia Partners, he worked at Welsh Carson implementing best practice operating principles and continuous improvement programs across their portfolio of companies. Earlier in his career he worked as a consultant, working across various industries including mining, financial services, and the public sector.



David Spiller

Partner, Portfolio Group

Bain Capital

David Spiller joined Bain Capital in 2011. He is a Partner in the Portfolio Group and a member of the North America Private Equity team. David works primarily on investments in the Consumer vertical.

Prior to joining Bain Capital, David was an Associate Principal at McKinsey & Company, working primarily with consumer goods manufacturers on growth strategy, portfolio optimization, and revenue management topics. Prior to McKinsey, he worked with Latin American financial institutions clients at Citibank.

David received an MBA with honors from Columbia Business School and a JD from Columbia Law School, where he was a Harlan Fiske Stone Scholar. He graduated cum laude from the School of Foreign Service at Georgetown University.



Paul Nary

Assistant Professor of Management

The Wharton School

(Moderator)

Paul Nary is an Assistant Professor of Management at the Wharton School, University of Pennsylvania. He is a corporate strategy researcher who is interested in how firms' resources and capabilities affect their external transaction strategies, that is how firms acquire, sell, or partner for access to corporate assets. Dr. Nary's research explores topics in corporate strategy, especially M&A, and the role and behavior of private equity firms in public markets. His work has been published in top strategy journals, including Strategic Management Journal and Academy of Management Review.

Prior to his academic career, Dr. Nary has worked for Intel Corporation, where his work spanned corporate venturing, new business development, mergers and acquisitions, and external technology collaborations. Before Intel, he worked for a boutique PE firm, a commercial real estate investment fund, and started several business ventures. Dr. Nary completed his Ph.D. in Strategic Management and Entrepreneurship at the Carlson School of Management at the University of Minnesota. He also holds a Master's degree from the Ross School of Business at the University of Michigan, and an M.B.A. and a B.S. in Finance from DePaul University.



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Riverside

Venture Capital

🕒 11:20 AM–12:10 PM

📍 10th floor President's room



Brenton Fagnoli

Partner

Lightspeed

Brenton joined Lightspeed as a Partner in 2025 to lead Healthtech investing at the firm, with a particular focus on AI's role in reshaping the healthcare landscape. Previously, he worked closely with Kevin Ryan, the "Godfather of NYC tech," at AlleyCorp where he started its Healthcare team and led it to become the most active Healthtech investor in the country (per HSBC Annual Venture Healthcare Report 2024). Prior to AlleyCorp, Brenton was an early employee at Flatiron Health and helped build its value-based care business from the ground up, served on its leadership team through acquisition by Roche for ~\$2B, and was instrumental in the launch of OneOncology which went on to be acquired by AmerisourceBergen and TPG for ~\$2B. He also worked previously at J.P. Morgan in its Healthcare Investment Banking Division, as well as at Blue Cross & Blue Shield.

Brenton started his career as a physician. Board-certified in Internal Medicine, he previously practiced at Memorial Sloan Kettering Cancer Center and completed residency at Harvard's Brigham and Women's Hospital. He graduated summa cum laude from the University of Pennsylvania, earning an MD from the University of Pennsylvania School of Medicine and an MBA in Healthcare Management from the Wharton School.



Klee Kleber

Co-Founder

BuildGroup

Klee Kleber is a co-founder of BuildGroup, a venture capital firm based in Austin, that backs AI-enabled SaaS companies as they scale. At BuildGroup, Klee has worked with portfolio companies including Cybrary, Anaconda, Vidmob, Fiix, and Calytera. He continues to apply his expertise in building and scaling companies through periods of rapid growth and market evolution, partnering with founders to create the conditions for long-term success.

Before co-founding BuildGroup, Klee built a 20+ year career as a marketing executive, leading high-performance teams at companies such as Rackspace, Dell, WP Engine, and Segway. At Rackspace he was SVP of Marketing and Product Development, where he led the company's rebranding, IPO marketing, and expansion into the private cloud market. Before Rackspace, Klee served as Vice President of Marketing at Dell, overseeing the growth of its notebook business to the #1 position in market share, launching its e-commerce business in Japan, and establishing its SMB division in Germany.

Klee graduated from Wharton in 1994 with a concentration in Marketing and Entrepreneurship. He was a proud member of Cohort E, where he was one of the social coordinators. Klee spent time volunteering as a tutor at local high schools in West Philly, and served on the school's Ethics Committee. His favorite lunch truck was the Greek Lady, favorite bar was Roosevelt's, and favorite cheesesteak was Geno's. And he has been an Eagles fan since the 90s!



Todd Pietri

Co-founder & Co-Managing Partner

Activate Venture Partners

Mr. Pietri is Co-founder and Co-Managing Partner of Activate Venture Partners and its predecessor funds. Mr. Pietri has significant expertise in the Digital Health sector and has guided over a dozen portfolio companies to successful exits, including numerous software and data businesses. Prior to co-founding his first venture capital firm 20 years ago, Mr. Pietri has been an investment banker, private equity investor, and technology company operating executive, including stints in direct sales, sales management, channel management, business development and business process consulting.

Mr. Pietri holds a B.A., cum laude, in English from Duke University. He holds an M.B.A. from the Robinson School of Business at Georgia State University (valedictorian). He is also a CFA charterholder. Mr. Pietri is an advisory board member of the Healthcare Advisory Board for the Partnership for NYC.



Kate Cummings

Partner

Equal Opportunity Ventures (Moderator)

Kate is a Partner at Equal Opportunity Ventures where she invests in early-stage companies that increase economic mobility in America. Prior to joining EOY, she held GM-style roles in government and venture-backed tech.

Secondaries

🕒 11:20 AM–12:10 PM

📍 10th floor Olympics 1 & 2



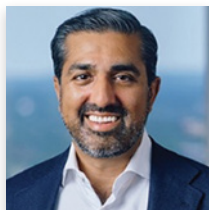
Andrew DiGeronimo

Managing Director, Co-Head of Partnership Solutions

Warburg Pincus

Andrew DiGeronimo is based in New York and is a Managing Director, Co-Head of Partnership Solutions. He was previously a Partner at LGT Capital Partners in New York, where he joined in 2008. Andrew was responsible for the U.S. secondary solutions business focusing on single and multi-asset solutions and LP secondaries in private equity buyout and venture capital funds across the U.S.

Prior to LGT Capital Partners, he worked as an Originations Associate at Eurohypo AG and as a REBAS Associate at PricewaterhouseCoopers LLP. He attended the University of Michigan – Stephen M. Ross School of Business.



Kumber Husain

Managing Director

Audax Strategic Capital

Kumber is a Managing Director for Audax Strategic Capital, focused on providing various capital solutions to companies owned by private equity sponsors. Prior to joining Audax in 2022, Kumber was Managing Director, Head of Americas, for DWS Private Equity and previously worked at Morgan Stanley Alternative Investment Partners, WP Global Partners, and Swiss Re. Kumber's experience spans private equity secondaries, co-investments and fund commitments, with the majority of investments being made into concentrated and customized secondary transactions.

Kumber received a BA from George Washington University and a MSc from the London School of Economics.



Victor Ko

Managing Director

Neuberger Berman

Victor Ko is a Managing Director at Neuberger Berman. Prior to joining Neuberger Berman Private Equity, Mr. Ko worked at HarbourVest Partners in its Boston and London offices focusing on secondary private equity opportunities including portfolios of direct investments and various structured transactions.

Mr. Ko started his career as an investment banking analyst at Jefferies & Company in New York and was previously a Sergeant in the Republic of Korea Army. He received a BA in Economics from the University of Chicago.



Jon Madorsky

Managing Partner

RCP Advisors

Jon is a Managing Partner of RCP. He is the portfolio manager for the Firm's secondary investment activities and maintains broader activities throughout the investment function. He is a member of the Investment Committee and active as an Advisory Board member of various underlying funds. He has been involved in the private equity industry for nearly 20 years. He has been with the Firm since the formation of RCP Fund II.

Prior to joining RCP, Jon worked for two middle market buyout funds. He also worked for PricewaterhouseCoopers' Strategic Business Unit. He is a Member of Young Presidents Organization (YPO) and on the Board of Directors at Ransom Everglades School, where he is an Alumnus. Jon received a BA in History from Emory University and an MBA from the University of Chicago.



Simon Oak

Managing Director

Lexington Partners

(Moderator)

Simon Oak is a Managing Director on the Secondary team primarily focused on the origination, evaluation, and execution of secondary opportunities including partnership and GP-led transactions.

Simon joined Lexington in 2006 as an associate on the CIP team and rejoined as a member of the secondary team in 2010 after business school. Prior to that, he was an analyst in investment banking at Credit Suisse. Simon graduated from McGill University with a BCom in Finance and from the Wharton School of the University of Pennsylvania with an MBA.

Real Estate

🕒 11:20 AM–12:10 PM

📍 10th floor Olympics 4 & 5



Samantha DiSciullo

Managing Director

Sculptor

Samantha DiSciullo is a Managing Director at Sculptor Real Estate. Ms. DiSciullo has primary responsibility for equity and debt investments in the industrial sector.

Prior to joining the firm in 2015, Ms. DiSciullo was an Analyst with The Blackstone Group. Ms. DiSciullo graduated summa cum laude from the Wharton School of the University of Pennsylvania, where she received a Bachelor of Science in Economics. Ms. DiSciullo serves on the board of Edible Schoolyard NYC.



Adam I. Gordon

Managing Partner

Wildflower

Adam I. Gordon is the Managing Partner of Wildflower Ltd. A fourth-generation New Yorker, Gordon has built his career identifying and capitalizing on emerging urban real estate trends. Wildflower develops electric vehicle charging stations, urban self storage, fleet parking, and is Amazon's most active New York City e-commerce warehouse developer. Adam's most ambitious effort to date is Wildflower Studios; the world's first vertical film studio. With partner Robert De Niro and architect Bjarke Ingels, the project is a billion dollar campus for content creation. Adam is a committed environmentalist. As a former longtime member of the Directors' Cabinet the Scripps Institution of Oceanography, he helped develop the Institution's 100-year campus master plan. He graduated with an MBA in finance from The Wharton School and a BA in International Relations from The University of Michigan.



Anthony Murphy

Managing Director, Acquisitions

Starwood Capital Group

Anthony Murphy is a Managing Director in Acquisitions at Starwood Capital Group. In this role, he is responsible for originating and executing investments across multiple property types, with a primary focus on corporate investments. He has been involved in both equity and debt investments in public companies, apartments, office, industrial, healthcare, development, residential land, and lodging. Mr. Murphy joined Starwood Capital in 2014 upon graduation from the Wharton School of the University of Pennsylvania with a B.S. in economics.



Ari M. Shalam

Managing Partner

RWN Management

Ari M. Shalam is a lecturer in Real Estate Entrepreneurship at Wharton, winning teaching excellence awards every year in that role. He is also the founder and current Managing Partner of RWN Real Estate Partners LLC, a NYC based real estate private equity platform. RWN targets direct and controlled, middle market joint venture investment opportunities across most property types. RWN has transacted in New York City, Texas, North Carolina, Pennsylvania, Miami and Puerto Rico.

From 2009 to 2011, Ari was the President of Enterprise Asset Management, Inc. a real estate centric multi-family office and from 2003 to 2009, he was a Senior Partner and Director of Acquisitions of Taconic Investment Partners, a fully integrated real estate investment and development company focused on New York City. Previously, he was the Director of Acquisitions for the Kaufman Organization. Throughout his real estate career, Ari has led nearly \$2.5 billion in real estate investments.

Ari is the chairman of the board of the directors of Voxx International Corporation (NASDAQ: VOXX), and a former advisory board member of the

Penn Institute of Urban Research and the board of the Good+ Foundation, as well as a former trustee of the Trinity School in New York City.

Ari received his BS in Economics from the Wharton School of the University of Pennsylvania cum laude and his MBA from the Harvard Business School.



James Nelson

Principal and Head, U.S. Investment Sales

Avison Young

(Moderator)

James Nelson is Principal and Head of U.S. Investment Sales where he leads Avison Young's significant investment sale efforts and growth strategies in the top U.S. markets. Avison Young is a full service global real estate firm with over 5,000 real estate professionals located in 120 offices in 20 countries including more than 50 offices across the United States. With a differentiated approach, the cohesive U.S. Investment Sales Group leverages best in class execution to deliver superior results for clients.

Since joining Avison Young in 2018, James has been involved in over 225 sales valued at well above \$3 billion dollars, resulting in his being named a top global top producer, a Commercial Observer's Power 100, and a CoStar Power Broker. James has also been a recipient of REBNY's prestigious Edward S. Gordan Deal of the Year award. Some noteworthy clients include The Archdiocese of New York, Breaking Ground, The Carlyle Group, JP Morgan Chase, Salvation Army and Vornado among others.

James builds unique sales platforms at Avison Young consisting of a unified, client-first sales group that is broken out by asset class and providing the best client experience. This approach aligns with Avison Young's principally owned structure which allows principals to be personally invested in the long-term success of their clients.

Throughout his over 25-year career, James has been involved in the sale

of approximately 500 property and loan sales for an aggregate value of over \$5 billion dollars. Prior to joining Avison Young, James served as Vice Chairman of Cushman & Wakefield, where his team was ranked the number one Investment Sales broker nationwide in 2016. Previously, James was a partner and top producer for Massey Knakal for six of their last eight years and was named the company's youngest partner in 2004.

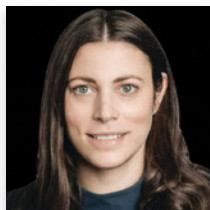
James is passionate about real estate and helping others achieve success. With his Wall Street Journal bestselling book *The Insider's Edge To Real Estate Investing*, podcast, videos, and weekly Forbes articles, he advises on how to navigate and stay on top of this ever-changing market. He enjoys guest lecturing at Columbia, Fordham, NYU, Wharton, and of course his alma mater Colgate. He often provides this real estate expertise to notable mainstream publications such as The Wall Street Journal, NY Times, and the NY Post.

James serves on the boards of REBNY, SparkYouth NYC, and USA Water Polo and is a former Chairman of YM/WREA. He is also a co-founder of the Real Estate Services Alliance (RESA) and the Colgate Real Estate Council. His greatest joy is spending time with his wife Allison and three sons Luke, Austin, and TJ either at home in Connecticut, up on the Cape, or travelling to their water polo tournaments on the West Coast.

Large-Cap Buyouts

🕒 1:05 PM–1:55 PM

📍 10th floor President's room



Miriam Tawil

Partner

EQT

Miriam Tawil joined EQT Partners in September 2022 and is a Partner in the Private Equity Business Line, based in New York. Prior to joining EQT, Miriam was a Partner at Centerbridge Partners. Previously she worked in private equity at TPG and in the Mergers and Acquisitions Group at Blackstone. Miriam has an AB in Economics from Harvard College and an MBA from Harvard Business School.



Ian Gutwinski

Founder and CEO

Mosaic

(Moderator)

Ian is the Founder and CEO of Mosaic. Prior to building Mosaic, Ian worked in private equity for six years at Onex Partners in New York. An avid technologist and self-taught coder, Ian built the first version of Mosaic as a class project at MIT where he was cross-registered during his MBA at Harvard Business School. Ian holds a Bachelors and Masters of Accounting from University of Waterloo, an MBA from HBS, and is a CPA. In his spare time, Ian is a private pilot and enjoys squash, beach volleyball and motorsports.

Defense

🕒 1:05 PM–1:55 PM

📍 10th floor Olympics 1 & 2



Paul Benfield

Head of Strategy

Forterra

Paul Benfield is Head of Strategy at Forterra, leading engagements with the US. Department of Defense and other customers.

Prior to Forterra, Paul was a director at Pallas Advisors, assisting innovative companies navigate go-to-market strategies for commercial success in the national security sphere, and at Pallas Ventures where he leveraged his expertise in venture capital and emerging dual-use technology within the national security ecosystem.

Before transitioning to the private sector, Paul served over 20 years in various roles in the U.S. Army, earning the Douglas MacArthur Leadership award in May 2013. His final role was as Military Assistant to the Deputy Secretary of Defense, focusing on innovation and modernization priorities including integrating emerging technology into operational concepts.

Paul is an Adjunct Senior Fellow for the Defense Program at the Center for a New American Security (CNAS). He holds a M.A. in Policy Management from Georgetown University and a B.A. from Campbell University.



Tom Gillespie

Managing Partner

In-Q-Tel

Tom Gillespie serves as Managing Partner on In-Q-Tel's Investment Team, where he is responsible for investing in commercial, venture capital-backed technologies that have the potential to address challenges faced by the U.S. national security community. He has had a particular focus on commercial space technology and has led

investments in over twenty space technology ventures, including launch vehicles, remote sensing constellations, space situational awareness, in-space logistics, and satellite componentry investments. In addition to space deals, he has led IQT investments in the areas of robotics, materials, power sources, and autonomous systems, as well as several analytics ventures.

Prior to In-Q-Tel, Tom was a strategy consultant at Booz Allen Hamilton, serving clients in the aerospace, financial services, and government (national security and defense) sectors. Earlier experience includes positions in international privatization and the United States Congress, where he focused on telecommunications, space, financial services, and foreign affairs issue areas.

Tom earned a B.A. in Economics from Stanford University, and an M.B.A. in Finance from the Wharton School of the University of Pennsylvania.



Mislav Tolusic

Managing Partner

Marlinspike

Mislav brings a wealth of deal sourcing, due diligence, negotiations, and portfolio management experience to the team. He has extensive experience working with management teams, taking corporate actions, and driving strategic outcomes for shareholders. He has served in various capacities on boards of Hoverfly Technologies, Trinity Cyber, WhiteFox Defense Technologies, and PreVeil.

Mislav's prior work experience comprises of roles as a Chief Investment Officer (CIO) and Partner at AIM13|CVP Partners, an investment vehicle co-managed by Crumpton Global and AIM13, Chief Financial Officer (CFO) for the Crumpton Group, Senior Portfolio Analyst with Highland Capital Management, a Dallas, TX-based alternative asset manager, Strategy consultant for Dalekovod, a Croatia-based transmission and distribution line manufacturer, and Internal Strategist at Airbus UK.

He has been involved in many notable transactions including FusionX (sold to Accenture), Orbis Operations (sold to McNally Capital), Hoverfly Technologies, Chainalysis, PreVeil, Trinity Cyber, Slingshot Aerospace, National Resiliency, Penda Bedliners (sold to Resilience Capital Partners), Moll Industries (sold to Riverbend Industries), NexTech Aerospace and creation of UniDal, a joint venture between Dalekovod (a Croatia-based transmission and distribution line manufacturer) and Unior Group.

He also launched an investment arm for the Crompton group and pioneered a hands-on approach to venture investing.

Mislav has a BS Degree in Aerospace Engineering from the University of Zagreb, Croatia. He graduated first in his class and was awarded a Dean's Medal. He came to the United States in 2003 and received his MBA from Vanderbilt University. He is a proud American citizen, currently living in Alexandria, VA with his wife and two young boys.



Michael Webb

Investor

In-Q-Tel

(Moderator)

Michael Webb is an investor at In-Q-Tel (IQT), the strategic investment firm affiliated with the U.S. intelligence and national security communities. He primarily focuses on venture investments within IQT's space technology and advanced systems portfolios.

Before joining IQT, Michael was a private equity investor at J.F. Lehman & Co., an aerospace and defense-focused PE firm in New York City. He previously worked as an Investment Banking Analyst in Wells Fargo Securities' Transportation and Logistics group and has also served as an advisor to startups within the commercial space sector.

Michael holds an MBA from The Wharton School at the University of Pennsylvania and a BBA in Finance from the McCombs School of Business at The University of Texas at Austin.



**Private Debt
Investor**

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Middle Market Buyouts

🕒 1:05 PM–1:55 PM

📍 10th floor Olympics 4 & 5



Charles Ha

Principal

TA Associates

Charles is a sponsor in TA's North America Technology Group focused on leading majority & minority investments in category-leading software companies, such as PowerGEM & Technosylva among others. Prior to TA, he was a Vice President at General Catalyst, and also spent time at Cisco Systems in the Office of the CEO. Charles has an MBA from The Wharton School and a BA in Mathematical Methods, Economics & Legal Studies (Honors with Distinction) from Northwestern University.



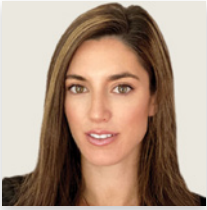
Daniel Siegman

Partner

Trilantic North America

Dan Siegman is a Partner at Trilantic North America and a member of the Investment Committee. Trilantic North America is a growth oriented PE fund with \$9.7 billion in aggregate capital commitments and was recognized by Inc. Magazine's 2019 list of Top 50 PE Firms for Entrepreneurs.

Dan joined Trilantic North America in 2013, prior to which he worked at Invus Opportunities, a private equity firm, and at The Boston Consulting Group. He is currently a director of Sunstates Security, Tercera and WebFX. Dan was formerly a director of Asset Living and Outdoor Living Supply. Dan holds an M.B.A. from The Wharton School of the University of Pennsylvania and a B.A., summa cum laude, in International Relations and History from the University of Pennsylvania.



Stefanie Raiola

Director

Hg Capital

Stefanie is a Principal on the Genesis team, Hg's mid-market fund, where she focuses on Fintech and GRC opportunities.

Stefanie joined Hg in 2021 to support Genesis in North America. She is currently involved with Hg's investments in Nitrogen (board member), Ncontracts (board member), Mitrtech (board member), and Gen II.

Prior to Hg, Stefanie spent five years at Atairos focused on hospitality, leisure & entertainment, and financial services investments. Stefanie began her career at JP Morgan in the TMT & Fintech investment banking group.

Stefanie has a BBA from Northeastern University.



Maggie D. Flores, P.C.

Partner

Kirkland & Ellis

(Moderator)

Maggie Flores is a corporate partner in the New York office of Kirkland & Ellis LLP. Maggie represents an extensive roster of clients ranging from blue chip public companies to leading private equity sponsors to prominent private companies who tap her for their most complex and transformative transactions, including structuring and negotiating domestic and international mergers, acquisitions and divestitures, leveraged buyouts, carve-outs, de-SPAC transactions, capital markets offerings, and other recapitalizations, restructurings and strategic transactions. She also counsels clients on a range of general corporate and securities law matters, including corporate governance and fiduciary duties.

Maggie was recognized in Bloomberg's "They've Got Next" series in 2024 and as a "Rising Star" by The New York Law Journal as part of its 2024 New York Legal Awards. Maggie was also named one of "New York's Notable Women in Law" by Crain's New York Business in 2023 and was selected as one of the "Top Women in Dealmaking" by The Deal in 2022. Maggie is a regular speaker at Practising Law Institute (PLI) events, including co-chairing PLI's M&A Conference from 2022 to 2024 and its Securities Law Conference in 2024.

Infrastructure

🕒 2:20 PM–3:10 PM

📍 10th floor President's room



Marco Gatti

Managing Director

ArcLight

Marco Gatti has over 15 years of experience developing, managing, and investing in companies across the energy, mobility, and heavy industry space. Currently, Mr. Gatti leads ArcLight's renewable energy and energy transition investment activities. Prior to joining ArcLight, he was a Vice President at Warburg Pincus and also worked at Bain Capital, McKinsey & Company and Praxair. Mr. Gatti earned a Master of Business Administration from the Wharton School of the University of Pennsylvania, a Master of Science in Mechanical Engineering from the University of Minnesota and a Bachelor's in Mechanical Engineering from Politecnico di Milano.



Neha Jatar

Managing Director, EQT Value-Add Infrastructure

EQT

Prior to joining EQT, Neha worked at Monomoy Capital Partners, a private equity firm based in New York, where she focused on investments across the Industrial and Consumer sectors. Prior to that, Neha worked as an Analyst in the Industrials group at Barclays.

Neha holds Bachelors degrees in Mechanical Engineering and Finance from the University of Pennsylvania.



Hadley Peer Marshall

Chief Financial Officer; Managing Partner, Infrastructure

Brookfield Asset Management

Hadley Peer Marshall is the Chief Financial Officer of Brookfield Asset Management. In this role, she is responsible for overseeing the firm's finance, treasury, tax and investor relations functions. She is also a Managing Partner and co-Head of Brookfield's infrastructure debt and structured solutions businesses, where she oversees the origination, execution and asset management of the Firm's infrastructure credit and structured solutions investments.

Prior to joining Brookfield in 2015, Ms. Peer Marshall was Co-Head of the project finance and infrastructure group at a leading investment bank, where she was responsible for originating, structuring, executing and advising on infrastructure and project financings for clients.

Ms. Peer Marshall holds Master of Business Administration and Bachelor of Science degrees from the University of North Carolina at Chapel Hill.



Tim Short

Managing Partner

Acadia Infrastructure Capital

Tim Short has over 20 years of experience working across all forms of renewables, including utility scale, residential and distributed solar, battery storage, natural gas generation, regulated electric utilities and transmission, as well as clean technology growth. Prior to starting Acadia in 2023, Tim was a Managing Director within the KKR Infrastructure Investment team and, prior to that, a Managing Director with Capital Dynamics' Clean Energy Infrastructure Team. Tim has closed over 40 deals in clean energy infrastructure during his career, deploying over \$10 billion in capital.

In 2018, Tim led the USD 1.7 billion privatization of 8point3 Energy Partners, a transaction which was awarded the S&P Global Platts

Financial Energy Deal of the Year, among other accolades. In 2019, Tim was awarded Power Finance & Risk's Project Sponsor Finance Official of the Year.

Prior to joining Capital Dynamics in 2010, Tim held positions at UBS Investment Bank within the global power and utilities team and at Greentech Capital Advisors as an investment banking associate. He has also worked as a climate change advisor to the former Australian Federal Minister for the Environment. His involvement with clean energy began as a process engineer at BP Solar (Australia) and CSG Solar (Australia).

Tim holds bachelor's degrees in Commerce (Finance) and Engineering (Photovoltaics and Solar Energy - first class honors) from the University of New South Wales and an MBA with Honors from the Wharton School at the University of Pennsylvania.



Martin Torres

Managing Director, Head of Americas, Global Head of Energy Transition
Wren House

Martin is a Managing Director and Head of Americas for Wren House, based in New York. Martin is involved in all aspects of managing the Wren House business in the Americas, as well as involvement in the origination, execution and asset management of investments across the region with global responsibility for Energy Transition.

Martin joined Wren House in February 2023 from BlackRock, where he spent nearly 7 years, latterly as Head of the Americas for the Climate Infrastructure Group.

Prior to joining BlackRock, Martin spent 10 years at Morgan Stanley, covering a range of roles including direct renewable energy investments and project financing. Earlier in his career, Martin worked for Merrill Lynch and Citigroup in various structured financing roles.

Martin has a BSc In Economics from the Wharton School of the University of Pennsylvania, and Juris Doctor from the Law School of University of Pennsylvania.



Tara Higgins

Partner

Sidley

(Moderator)

Tara Higgins, a co-leader of Sidley's global Energy and Infrastructure practice, focuses her practice on domestic and cross border energy and infrastructure transactions, including mergers and acquisitions, financings and restructurings of all types, and project development. She has particular experience in the renewable energy and sustainability space. Tara has been consistently recognized by several publications, including The American Lawyer as one of their "Northeast Trailblazers" (2022), both Chambers USA (2010–2024) and Chambers Global (2011–2025) in the category "Projects: Power & Renewables: Transactional," A Word About Wind's "Legal Power List" (2022), and Law360 as an Energy "MVP" (2021, 2024). Tara was also shortlisted for the 2023 "Energy, Natural Resources & Mining Lawyer of the Year" award by IFLR's Women in Business Law Americas Awards, which celebrates women lawyers who have developed strong and innovative practices.

Tara represents private equity and strategic investors, developers and lenders, and other financiers. She has experience with conventional power, hydroelectric, solar, wind, battery and storage, biomass and other alternative energy projects, midstream gas gathering and processing, interstate gas pipelines and gas storage facilities, water and waste treatment plants, industrial plants, and transportation projects. Tara has represented developers, lenders, multilateral agencies, and private equity and strategic investors in equity investments and lending transactions in multiple jurisdictions, including Argentina, Bermuda, Brazil, Canada, Cayman Islands, Ghana, Ireland, Mali, Mauritius, Mexico, the Middle East, Panama, the Philippines, Senegal, South Africa, sub-Saharan Africa, Turkey, Uganda, and Venezuela.

Special Situations

🕒 2:20 PM–3:10 PM

📍 10th floor Olympics 1 & 2



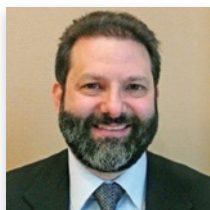
Bradley Friedman

Partner

Ares

Mr. Friedman is a Partner in the Ares Private Equity Group, where he focuses on special opportunities investing. He serves as a member of the Ares Special Opportunities Investment Committees. Prior to joining Ares in 2017, Mr. Friedman was an Associate in the Financial Restructuring Group at Milbank LLP and a Seconded at Kohlberg Kravis Roberts & Co. L.P. in the Special Situations and Distressed Investing Group. Previously, Mr. Friedman was a Judicial Law Clerk in the District Court for the District of Columbia. He was recognized by the American Bankruptcy Institutes as one their 40 under 40 honorees.

Mr. Friedman holds a BA from Emory University, where he was appointed to the Pi Sigma Alpha Honors Society; a JD, summa cum laude, from The George Washington School of Law; and a four year executive program in corporate finance and accounting at Harvard Business School and Harvard Law School. During law school, Mr. Friedman was a George Washington Scholar and received the Charles Glover Award and the Justice Thurgood Marshall Civil Liberties Award.



Michael Gatto

Partner, Head of Private Side Businesses, **Silver Point Capital**

Author, **The Credit Investor's Handbook**

Mr. Gatto was one of the first employees at Silver Point Capital, a credit-focused global investment firm. After joining the Firm in April 2002, he became the first non-founding partner in January 2003. He has helped grow the business from \$120 million of investable capital in 2002 to ~\$40 billion. Today, he is the head of the Firm's Private Side Businesses.

Prior to joining Silver Point, Mr. Gatto worked at Goldman Sachs as a senior member within the Special Situations Investing Business. Before Goldman, Mr. Gatto designed and taught credit training programs for loan officers of North American and European Financial Institutions, and prior to his training program work, he was a loan officer and director of Global Training at Citibank.

Outside of Silver Point, Mr. Gatto is an adjunct professor at Columbia Business School and Fordham University's Gabelli School of Business, where he teaches courses on credit analysis, and distressed value & special situation investing.

He authored the credit investing textbook - *"The Credit Investor's Handbook: Leveraged Loans, High Yield Bonds and Distressed Debt."*

Mr. Gatto received an M.B.A. from Columbia Business School and a B.A. in Economics from Cornell University.



Roopesh Shah

Senior Managing Director

Evercore

Roopesh Shah is a Senior Managing Director of Evercore's Restructuring and Debt Advisory Group. He joined Evercore in 2017. Mr. Shah has worked on numerous restructuring assignments, advising companies, creditors, and other parties on refinancings, exchange offers, consent solicitations, amendments, out-of-court restructurings, Chapter 11 bankruptcy reorganizations, distressed mergers and acquisitions, Section 363 asset sales and cross-border restructuring issues. Mr. Shah has also been involved in numerous DIP and exit financings for companies in Chapter 11 and several "rescue" financings for distressed clients.

Prior to joining Evercore, Mr. Shah was the Global Head of Goldman Sachs' Restructuring Finance and Advisory Group, where he had worked since 2006. Prior to Goldman Mr. Shah was a Director in the Restructuring Group of Miller Buckfire & Co. and a Vice President in

the Mergers & Acquisitions Group of Wasserstein Perella & Co. Mr. Shah received a B.S. in Economics from the Wharton School of the University of Pennsylvania, with concentrations in finance, marketing and information technology.

Mr. Shah is a board member of Futures and Options and an advisory board member of Her Justice, two nonprofits dedicated to assisting underprivileged and at-risk populations in the New York City area.



Chaim P. Theil

Partner, Co-Leader Hybrid Capital/Special Situations Group

Sidley

(Moderator)

Chaim is a member of the Private Equity and M&A Group at Sidley, a global law firm with over 2,000 lawyers worldwide. As co-leader of Sidley's Hybrid Capital/Special Situations Group, his practice encompasses advising sponsors and strategic clients on their domestic and cross-border opportunistic M&A, joint ventures, equity financings, hybrid capital structures, and general corporate transactions. Chaim is highly sought after by sponsors, private companies, and public companies in special situations, restructurings, bankruptcy sales, and other workouts. He has significant experience with transactions in a broad cross section of industries including healthcare, energy, media, industrials, retail, and technology.

Mr. Theil received his M.B.A. from Columbia Business School, his J.D. from New York University School of Law and his B.S. in Finance from Yeshiva University. He lives in New York City with his wife and three children.



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Growth Equity

🕒 2:20 PM–3:10 PM

📍 10th floor Olympics 4 & 5



Jessie Cai

Principal

General Atlantic

Jessie Cai is a Principal at General Atlantic and focuses on investments in the Consumer Technology sector. She joined the firm in 2018 after completing a summer MBA internship in 2017. Jessie's investment and portfolio experience at General Atlantic includes investments across both software and consumer technology, including Engagesmart, Kiwi.com, Chess.com, ETSY, Airbnb, Pendo, Articulate, and Flo Health. Prior to joining General Atlantic in 2018, Jessie was a Growth Equity Investment Associate at Summit Partners from 2013-2016 and covered financial services, consumer and business services. Before that, Jessie was an Investment Banking Analyst at Citigroup in the Power and Utilities group. She graduated from Northwestern with a B.A. in Mathematics and Economics, and an MBA from Harvard Business School.



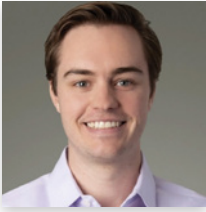
Ashwin Gupta

Managing Director

Goldman Sachs

Ashwin Gupta is a Managing Director in Goldman Sachs' Growth Equity team, with over 17 years of investing experience. He leads the US Growth Equity team's investments in Financial Technology companies. Ashwin has been investing in fintech for his entire career and is passionate about the transformative opportunity to build the next generation of financial services firms, and the infrastructure needed to support them. Ashwin holds a Bachelor of Science in Computer Science from Carnegie Mellon University. He represents the firm as a director on the boards of Blue Sage, Cuebiq, Deserve, iCapital, and Pico.

Outside of work, Ashwin loves to spend time with his family, and is a keen sports enthusiast, enjoying triathlons, tennis and golf. He also serves on the Board of Trustees for the Montessori Day School in Brooklyn.



Joe Mihm

Principal

Susquehanna Growth Equity

Joe focuses on B2B SaaS, vertical software, IT/infrastructure, and security software. Prior to joining Susquehanna Growth Equity in 2015, he co-founded an electricity trading company that was a market participant in MISO.

Joe currently serves as board member or observer on five boards and has been supported \$800m+ of capital invested by SGE. He graduated from the University of Chicago with a B.A. in Economics and a minor in Computer Science.



Samir Parikh

Co-Founder & Managing Partner

GiantLeap Capital

Samir is a Co-Founder and Managing Partner of GiantLeap Capital. He brings 25 years of investing experience in private and public markets across growth equity, public equities buyouts and structured credit.

Prior to GiantLeap, Samir was a Partner at a hedge fund, and Head of Equities (Real Estate) at Fir Tree Partners, a \$10 billion global investment fund that takes a private equity approach to public market investing. Samir invested in equities and credits at the intersection of technology and traditional industries. He led the firms' investments in Blackstone, KKR, Apollo, and Carlyle. Samir has also served as an Advisor on equity strategies for tech companies at hedge funds Hudson Bay Capital and Key Square Group.

Prior to this, Samir was an investor at SAB Capital Management, a hedge fund focused on special situations equities, distressed debt, and mortgages and William Harris Investors, a Chicago-based family office. Both funds took a concentrated, research-driven approach, engaging management to increase shareholder value.

Samir received his MBA from Harvard and graduated with honors in Biology & Economics from The University of Chicago.



Christopher Burwell

Partner

Kirkland & Ellis

(Moderator)

Christopher Burwell is a corporate partner in the New York and Bay Area offices of Kirkland & Ellis LLP. His practice concentrates on structuring, negotiating and executing complex business transactions. He frequently advises private equity funds and their portfolio companies in leveraged buyouts, mergers and acquisitions, carve-outs and growth equity and other minority investments.

Technology & AI

🕒 3:35 PM–4:25 PM

📍 10th floor President's room



Will Chen

Managing Director

Partners Group

Will Chen is a Managing Director at Partners Group, based in Denver, where he co-heads the U.S. Technology team responsible for buyouts and growth equity investments. He is a member of the Technology Vertical Investment Committee. Will has over 22 years of industry experience. Prior to joining Partners Group, Will was a Managing Director in the Corporate Private Equity Group within Goldman Sachs Asset Management. While at Goldman Sachs, he served on the board of directors for software and tech-enabled services companies such as Sterling, Aptos, CommerceHub and Fortress Information Security. Previously, he held positions at Apax Partners and Bain & Company. He is a Lauder alum and has an MBA and MA from the Wharton School at the University of Pennsylvania, and a BS and MS from the School of Engineering at Stanford University.



Joshua Selip

Managing Director

Providence Equity Partners

Josh Selip is a Managing Director on the investment team based in New York. He is currently a director of 365 Retail Markets, Accelerate Learning, Brandt, and TCP, and he previously served as a director of DoubleVerify and KPA. Mr. Selip originally joined Providence in 2011 as an associate, before attending business school. Previously, Mr. Selip was an investment banking analyst at Bank of America Merrill Lynch. Mr. Selip holds a Master of Business Administration from Harvard Business School and a Bachelor of Arts from Cornell University.



Erica Van

Partner

Intel Capital

Erica Van is a Partner at Intel Capital, a global (US, UK, China, Israel) generalist multi-stage venture capital firm that has been investing in startups for 30+ years. Erica currently focuses on leading early-stage B2B software and AI/ML investments. Previously, Erica was an investor at CRV (Charles River Ventures) focusing on early-stage B2B software. Prior to that, Erica co-founded a Strategy organization at JPMorgan Chase & Co., and previously worked in the office of the COO, and across investment banking, asset management, and treasury securities.



Sahas Singh

Lead Product Manager

Carta

(Moderator)

Sahas Singh is a seasoned product management leader with over eight years of experience building technology solutions for the private equity industry. He specializes in developing and scaling products that support portfolio monitoring, asset management, valuations, LP management, and fund administration workflows.

Currently, Sahas leads product management for private equity solutions at Carta, where he has been driving product strategy for the past two and a half years. Prior to Carta, he held product management roles at Juniper Square and Mercatus (acquired by State Street), where he was responsible for developing software & AI solutions that streamline operations & unlock value creation for private equity firms.

Sahas earned his B.S. in Mechanical Engineering from the Georgia Institute of Technology.

Breaking into PE/VC

🕒 3:35 PM–4:25 PM

📍 10th floor Olympics 1 & 2



Brandon O'Gara

President & CFO

Accelerate Investment Partners

As a member of Accelerate's executive team, Brandon O'Gara leads all financial and investment functions, where he is responsible for acquisitions, corporate finance, investor relations, and helping set the strategic direction for the firm. Accelerate invests in real estate under critical infrastructure with a focus on the Renewable, Digital and Transportation industries.

Brandon joined Accelerate from Echo Investment Capital, where he helped raise more than \$1 billion of capital from institutional investors and LPs which was deployed into more than 110,000 acres of oil and gas real property rights. He was previously with Wexford Capital where he worked closely with Diamondback Energy.

Brandon earned his B.S. in economics from The Wharton School at the University of Pennsylvania. He is a co-founder of Serve and Return, which provides tennis education and training to underserved youth in New York.



Jay Rughani

Investing Partner

Andreessen Horowitz

Jay Rughani is a partner at Andreessen Horowitz, where he invests in healthcare technology.

Over the past ~7 years, Jay has helped build the a16z Bio + Health practice and helped lead a16z's investments in numerous ambitious companies, including Alchemy, Biodock, Counsel, Ferry, Inductive,

Komodo, Midstream, Orchestra, Pearl, RxCure, Tennr, Thatch, Thyme, Topography, Turquoise, and Valar.

Prior to joining a16z in 2018, Jay was an early team member at Flatiron, an electronic health record and real-world evidence company acquired by Roche for ~\$2B. There, he helped to build some of the company's first healthcare software and data products and later led numerous commercial partnerships through the company's period of hypergrowth. Before Flatiron, he consulted for large healthcare and technology companies around the world at Deloitte, worked at Dealmatch (a seed-stage B2B marketplace later acquired by Cox Enterprises), and co-founded an unsuccessful startup with his college roommate.

Jay graduated from Emory University with a degree in Mathematics & Economics and grew up mostly in Tampa Bay, FL, apart from a three-year stint in boarding school in London, UK.



John Godfrey

Corporate Partner

Sidley

(Moderator)

John Godfrey is a corporate partner in the New York office of Sidley Austin LLP. He represents private equity firms, portfolio companies, and other private and public companies on mergers, acquisitions, sales, joint ventures and other complex transactions, as well as general corporate governance matters.

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Sidley's preeminent global M&A practice that is engaged in the full spectrum of corporate transactions across a variety of industries. Our lawyers advise on complex public and private mergers and acquisitions, private equity, venture capital, real estate, and other alternative investment transactions. We bring value and insight to every matter through our deep knowledge of all facets of the investment cycle, while drawing upon the complementary experience of the firm's leveraged finance, debt and equity capital markets, and restructuring practices.

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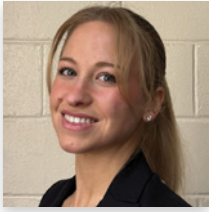
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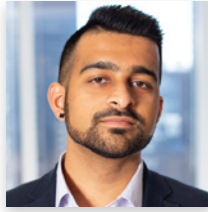


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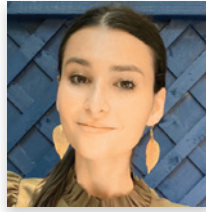
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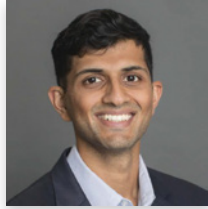
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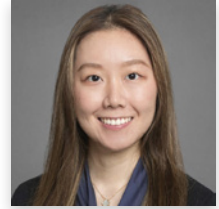
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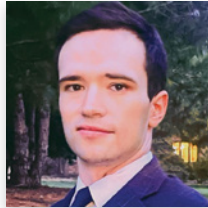
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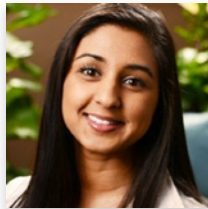
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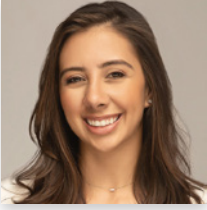
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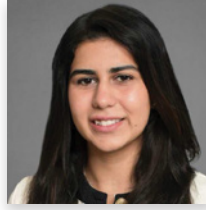
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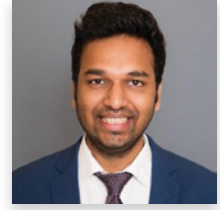
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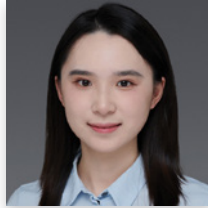
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