

2025 US Investor Conference

Navigating Change, Dislocation, and Growth



Time (CDT)	Topic
12:00-1:00pm	REGISTRATION & NETWORKING LUNCH 6 th Floor
1:00-1:15pm	OPENING REMARKS Grand Ballroom Kevin O'Donnell , Partner & Global Head of Investor Relations
1:15-1:45pm	JEFF DIEHL ON THE FUTURE OF PRIVATE MARKETS Jeff Diehl , Managing Partner & Head of Investments Moderated by: Scott Hazen, CFA , Partner & Head of Investor Relations (North America)
1:45-2:25pm	LP PERSPECTIVES: NAVIGATING PRIVATE MARKETS IN 2025 Randall Baum, CFA , Chief Investment Officer, Denver Employees Retirement Plan Graeme Hay, CPA, CMA, CFA , Chief Investment Officer, Teachers' Retirement Allowances Fund Pete Keliuotis, CFA , Executive Vice President & Head of Alternatives Consulting, Callan Moderated by: Jennifer Brown , Partner & Global Head of Consultant Relations
2:25-2:45pm	Break
2:45-3:15pm	TOP TRENDS SHAPING THE VENTURE LANDSCAPE Stephen Bluestein , Partner, Primary Investments Brijesh Jeevarathnam , Partner & Global Head of Fund Investments
3:15-3:45pm	UNLOCKING VALUE IN A GROWING SECONDARY MARKET Todd Miller , Global Co-Head of Secondary Advisory, Jefferies Jeff Akers , Partner & Head of Secondary Investments Moderated by: Kristina Milberg , Principal, Investor Relations
3:45-4:00pm	Break
4:00-4:30pm	THE POWER OF THE PLATFORM: WINNING IN A CROWDED PRIVATE CREDIT MARKET Daniel Zarkowsky , Managing Principal, Head of Business Development and Head of Capital Markets, Odyssey Investment Partners Moderated by: Fred Chung , Partner & Head of Credit Underwriting
4:30-5:00pm	A CONVERSATION WITH CAPITOL MERIDIAN: HOW POLICY, DEFENSE, AND REGULATION WILL SHAPE THE ECONOMY Brooke Coburn , Founding Partner, Capitol Meridian Partners Moderated by: Matt Autrey , Partner, Primary Investments
5:00-5:30pm	ASSET ALLOCATION: OPTIMAL PORTFOLIO CONSTRUCTION FOR LONG-TERM GROWTH Miguel Gonzalo, CFA , Partner & Head of Investment Strategy and Risk Management
5:30-5:35pm	CLOSING REMARKS Kevin O'Donnell , Partner & Global Head of Investor Relations
	<i>Transition to Z Bar</i>
5:45-8:00pm	NETWORKING & COCKTAIL RECEPTION Z Bar