

# 2025 US Investor Conference

## Navigating Change, Dislocation, and Growth



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