6th Annual Conference

2023

Greenwich Economic Forum

October 3 & 4, 2023

Greenwich, Connecticut

Updated Version

General Information

Internet Access

There is unsecured wireless Internet access available throughout the hotel.

WiFi Name: **Greenwich Economic Forum** Password: **GEF2023!**

Security

For security reasons, it is important that you wear your Forum badge at all times. Please ensure you return with your badge for Day 2.

Cocktail Receptions

We invite you for drinks at our Cocktail Reception on both days of the forum, taking place on the Terrace.

Filming/Photographing of Forum Sessions

Please note that the event will be filmed, and by entering the forum premises, you give your consent to be videotaped and photographed.

Post Event Media

Photographs and videos of speaker presentations will be available after the forum. An email including details of how to access these will be sent following the event. Please note that only forum sessions for which we have permission to publish will be available.

Connect with Us

Post about GEF and join the Greenwich Economic Forum LinkedIn groups.

Use **#GreenwichEconomicForum**

Welcome Letter - 6th Anniversary

On behalf of the Greenwich Business Institute, the State of Connecticut, and the Town of Greenwich, we would like to extend a warm welcome to our Speakers, Corporate Partners, Members, Delegates, and other Guests attending the 6th Annual Greenwich Economic Forum ("GEF").

GEF is a global alternative investment industry conference that convenes some of the brightest minds in finance and business for discussions on investing, trade, geopolitics, and capital markets. This year, we are hosting top leaders and executives from the US, Europe, the Middle East, China, India, and other counties at our oasis-like waterfront setting here in Greenwich, CT.

2023 was a special year for GEF as we went overseas and held our first-ever international conference — in Hong Kong. Discussing a variety of different perspectives on "the reopening of China and Asia", we heard from an incredibly talented group of Eastern and Western thought leaders with 2 days of programming, a highly engaged audience, and extensive coverage by Bloomberg TV.

Here at our 6th Annual Conference in Greenwich, Connecticut on October 3-4, you will have access to the very latest information and insights into the rapidly changing global investment landscape, and will be joined by:

- 300+ Senior executives and leaders
- 100+ Global institutional investors
- $7.0T+ of Institutional AUM
- Bloomberg TV, CNBC, and Yahoo Finance as the global broadcast partners

Following the 2023 Annual Conference, we will next convene in Coconut Grove, FL on January 29th for our third annual "Winter GEF" (i.e., GEF-Miami), and then on June 5th and 6th in Hong Kong for our second GEF-Hong Kong conference. We invite you to find a GEF representative to discuss how you can join the GEF community as a Member or Corporate Partner now and in the years to come..

Whether it's your 1st or your 6th GEF or somewhere in between, we hope that you will find the experience valuable, and that you will leave here feeling more informed and better connected ..

Thank you for joining us!

Sincerely,

Jim Aiello

Co-Founder
Greenwich Economic Forum

Bruce McGuire

Co-Founder
Greenwich Economic Forum

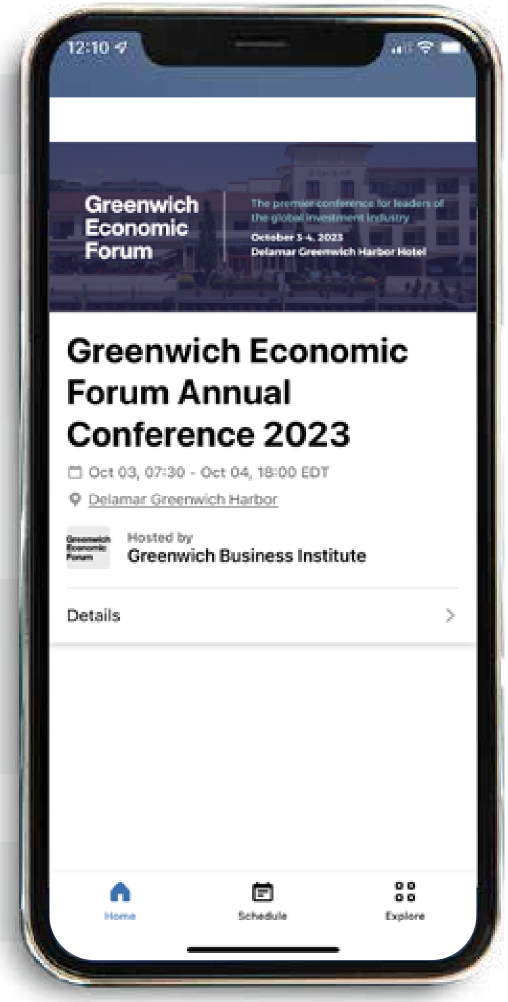
Download the Mobile App

Access the agenda, connect with other attendees, and so much more.

STEP 1 Download the Hopin app.

STEP 2 Login using the email you registered with to create your account.

STEP 3 Click on our event and enjoy!



Connect with Us

#GreenwichEconomicForum

Internet Access

WiFi Name: **Greenwich Economic Forum** Password: **GEF2023!**

JOIN US FOR A

Cocktail Reception

after all sessions have ended on October 3 and 4.

Greenwich Economic Forum

2024 SAVE THE DATE

MIAMI | JAN. 29, 2024

HONG KONG | JUN. 5-6, 2024

GREENWICH | OCT. 8-9, 2024

2023-2024

INDIVIDUAL MEMBERSHIP

$5,500

Individual Delegate Pass to ALL GEF Conferences during your membership period:

GEF MIAMI 2024
Coconut Grove, FL | January 29, 2024

GEF HONG KONG 2024
Hong Kong | June 5-6, 2024

ANNUAL CONFERENCE 2024
Greenwich, CT | October 8-9, 2024

Invitations to the following Networking Events during your membership period:

- Annual Member Dinner in December 2023 in Greenwich, CT
- Member Dinner during GEF-Miami
- Member Dinner during GEF-Hong Kong
- The two Member Cocktail Parties throughout the year in the NYC metropolitan area

GEF Membership

Corporate Partner Inquiry

2023-2024

CORPORATE MEMBERSHIP

$16,500

Three (3) Delegate Passes to ALL GEF Conferences during your membership period*:

GEF MIAMI 2024
Coconut Grove, FL | January 29, 2024

GEF HONG KONG 2024
Hong Kong | June 5-6, 2024

ANNUAL CONFERENCE 2024
Greenwich, CT | October 8-9, 2024

Three (3) Invitations to the following Networking Events during your membership period*:

- Annual Member Dinner in December 2023 in Greenwich, CT
- Member Dinner during GEF-Miami
- Member Dinner during GEF-Hong Kong
- The two Member Cocktail Parties throughout the year in the NYC metropolitan area

*Corporate memberships allow for three (3) interchangeable individuals from the Member Firm to attend the various GEF events.


Markets change.
We keep delivering.
Market cycles come and go. Churchill provides flexible capital solutions to private equity clients through them all. And we believe our disciplined approach generates long-term value for our investors.
Churchill. We invest in relationships.

Agenda

TUESDAY, OCTOBER 3, 2023

MASTER OF CEREMONIES

Randy Schwimmer, Co-Head of Senior Lending, Churchill Asset Management

7:30 AM EST – 8:25 AM EST

REGISTRATION & BREAKFAST

8:25 AM EST – 8:30 AM EST

GREENWICH ECONOMIC FORUM WELCOME

Jim Aiello, Co-Chair, Greenwich Economic Forum

Bruce McGuire, Co-Chair, Greenwich Economic Forum

Master of Ceremonies: **Randy Schwimmer**, Co-Head of Senior Lending, Churchill Asset Management

8:40 AM EST – 8:55 AM EST

GOVERNOR LAMONT WELCOME

Ned Lamont, Governor, State of Connecticut

9:00 AM EST – 9:25 AM EST

THE PERMACRISIS WE ARE IN: PERSPECTIVES BY MICHAEL SPENCE AND MOHAMED EL-ERIAN

Michael Spence, Economist & Nobel Laureate, Stanford University

Mohamed El-Erian, President of Queens College at Cambridge University, Chair of Gramercy & Adviser to Allianz

Moderator: **Sonali Basak**, Anchor, Bloomberg

9:30 AM EST – 9:55 AM EST

THE FUTURE OF PRIVATE CREDIT

Jose Minaya, CEO, Nuveen

Ken Kencel, President & CEO, Churchill Asset Management

Moderator: **Harold Ford Jr.**, Former Congressional Representative, Regional President, PNC Bank, New York

10:00 AM EST – 10:40 AM EST

DALIO: THE STATE OF THE GLOBAL ECONOMY

Ray Dalio, Founder, CIO Mentor and Member of the Board, Bridgewater Associates

Moderator: **David Westin**, Anchor, Bloomberg

Agenda

TUESDAY, OCTOBER 3, 2023

10:45 AM EST – 11:10 AM EST

STRATEGIC PERSPECTIVES ON BUILDING A BUSINESS

Brad Jacobs, Executive Chairman, XPO

Moderator: **Brooke Masters**, US Financial Editor, Financial Times

11:10 AM EST – 11:40 AM EST

NETWORKING BREAK

11:40 AM EST – 12:05 PM EST

PRIVATE CREDIT EXCELLENCE IN A "SHOCKING" ENVIRONMENT

Kipp deVeer, Director, Partner and Head of Credit Group, Ares Management

Moderator: **Jay Madia**, Head of Risk Assets, AXIS Capital

12:10 PM EST – 12:50 PM EST

THE NEW ROLE OF DIRECT LENDING TODAY

Gregory Robbins, Vice Chair, Golub Capital

Matt Kaplan, President and CEO, Great Elm Capital Corp

Kurt Hoffman, Co-Head of Underwriting for US Direct Lending, Apollo Global Management, Inc.

Moderator: **Kamaron Leach**, Reporter, Bloomberg News

12:50 PM EST – 1:30 PM EST

LUNCH

1:30 PM EST – 2:00 PM EST

THOUGHTS ON THE BUSINESS OF SPORTS

Wyc Grousbeck, Lead Owner, Governor and CEO, Boston Celtics

George Pyne, Founder & CEO, Bruin Capital

2:00 PM EST – 2:45 PM EST

MARKET STRATEGIST OUTLOOK

Saira Malik, CIO, Nuveen

Joseph Quinlan, Head of Market Strategy, Bank of America

Rich Nuzum, Executive Director & Chief Investment Strategist, Mercer

Moderator: **Deepika Sharma**, Head of Manager Selection, MASS, BlackRock

Agenda

TUESDAY, OCTOBER 3, 2023

2:50 PM EST – 3:30 PM EST

CEO PERSPECTIVES

Lawrence Calcano, Chairman & CEO, iCapital

Jan van Eck, CEO, VanEck

Moderator: **Andy Serwer,** Editor at Large, Barrons

3:35 PM EST – 4:05 PM EST

NETWORKING BREAK

4:05 PM EST – 4:50 PM EST

INSTITUTIONAL INVESTOR PERSPECTIVES

Jay Madia, Head of Risk Assets, AXIS Capital

David Graham, CIO, AmFam Group

Anders Hall, CIO, Vanderbilt University

Christine Todd, CIO, Arch Capital Group

Moderator: **Jim Aiello**, Co-Chair, Greenwich Economic Forum

4:55 PM EST – 5:20 PM EST

THE MACRO OPPORTUNITY SET: EMBRACING UNCERTAINTY AND VOLATILITY

Pablo Calderini, President & CIO, Graham Capital Management

Moderator: **Damian Sassower**, Chief EM Fixed Income Strategist, Bloomberg Intelligence

5:25 PM EST – 5:50 PM EST

FIRESIDE CHAT WITH MAYOR FRANCIS SUAREZ

Francis Suarez, Mayor, City of Miami

Moderator: **Maneet Ahuja**, Founder & Editor-at-Large, ICONOCLAST, Forbes

5:55 PM EST – 6:00 PM EST

CLOSING REMARKS

Jim Aiello, Co-Chair, Greenwich Economic Forum

Bruce McGuire, Co-Chair, Greenwich Economic Forum

Master of Ceremonies: **Randy Schwimmer**, Co-Head of Senior Lending, Churchill Asset Management

6:00 PM EST – 7:00 PM EST

COCKTAIL RECEPTION

Agenda

WEDNESDAY, OCTOBER 4, 2023

7:30 AM EST – 8:25 AM EST

REGISTRATION & BREAKFAST

8:25 AM EST – 8:30 AM EST

GREENWICH ECONOMIC FORUM WELCOME

Jim Aiello, Co-Chair, Greenwich Economic Forum

Bruce McGuire, Co-Chair, Greenwich Economic Forum

Master of Ceremonies: **Randy Schwimmer**, Co-Head of Senior Lending, Churchill Asset Management

8:35 AM EST – 9:00 AM EST

SENATOR BLUMENTHAL: THE ECONOMIC AND SOCIAL CONSEQUENCES OF THE UKRAINE WAR

Richard Blumenthal, U.S. Senator from Connecticut, United States

Moderators: **Jim Aiello** & **Bruce McGuire**, Co-Chairs, Greenwich Economic Forum

9:05 AM EST – 9:35 AM EST

FORESIGHT AT THE FORUM: DAVID RUBENSTEIN AND JENNY JOHNSON DISCUSS TRENDS AND OPPORTUNITIES IN TODAY'S DYNAMIC LANDSCAPE

David Rubenstein, Co-Founder & Co-Chairman, The Carlyle Group

Jenny Johnson, CEO, Franklin Templeton

9:40 AM EST – 10:20 AM EST

SURVIVING HEADWINDS: HOW WE CAN HELP PORTFOLIO COMPANIES NAVIGATE IN A TIGHT MARKET

Lisa Donahue, Co-Head of the Americas and Asia, AlixPartners

Mike Dieber, Partner and Co-Head of Portfolio Management, U.S. Direct Lending, Ares Management

Moderator: **Allison McNeely**, Reporter, Bloomberg

10:20 AM EST – 10:50 AM EST

NETWORKING BREAK

Agenda

WEDNESDAY, OCTOBER 4, 2023

10:50 AM EST – 11:30 AM EST

EXPANDING ACCESS TO ALTERNATIVE INVESTMENTS

James Costabile, Managing Director and Head of Alternatives Distribution, iCapital

Ludwig Pierre Schulze, Managing Partner, Alumni Ventures

Anna Snider, Head of Due Diligence, Bank of America

Ted Yarbrough, CIO, Yieldstreet

Moderator: **Emily Dreas**, Managing Director & Market Executive, Bank of America Private Bank

11:35 AM EST – 11:45 AM EST

PREAMBLE TO THE ENERGY TRANSITION PANEL

Afsaneh Beschloss, Founder & CEO, RockCreek

Mark Baumgartner, CIO, Carnegie Corporation of New York

11:45 AM EST – 12:20 PM EST

THE ENERGY TRANSITION

Afsaneh Beschloss, Founder & CEO, RockCreek

Lisa Audet, Founder & CIO, Tall Trees Capital Management

Mark Baumgartner, CIO, Carnegie Corporation of New York

Don Casturo, Founding Partner & CIO, Quantix Commodities

Moderator: **Rebecca Patterson**, Global Macro Investor & Board Chair, Council for Economic Education

12:20 PM EST – 1:00 PM EST

LUNCH

Afsaneh Beschloss, Founder & CEO, RockCreek

Mark Baumgartner, CIO, Carnegie Corporation of New York

1:00 PM EST – 1:30 PM EST

LUNCHEON FIRESIDE CHAT

Michael Spence, Economist & Nobel Laureate, Stanford University

Dambisa Moyo, Global Economist & Board Member, Chevron, Conde Nast, and the Oxford University Endowment

Moderator: **Rebecca Patterson**, Global Macro Investor & Board Chair, Council for Economic Education

Agenda

WEDNESDAY, OCTOBER 4, 2023

1:35 PM EST – 2:15 PM EST

OPPORTUNITIES TODAY IN REAL ASSET INVESTING

Justin Gregory, Senior Portfolio Manager, Hildene Capital Management
Bryan Donohoe, Partner, Co-Head of U.S. Real Estate, Ares Management
Pooja Goyal, Partner and Chief Investment Officer Infrastructure Group, The Carlyle Group
Moderator: **Deepika Sharma**, Global Head of Manager Selection, MASS, BlackRock

2:20 PM EST – 2:50 PM EST

IN CONVERSATION WITH WILBUR ROSS

Wilbur Ross, 39th US Secretary of Commerce, United States
Moderator: **James Fontanella-Khan**, US Corporate Finance and Deals Editor, Financial Times

2:55 PM EST – 3:30 PM EST

INNOVATIVE FINANCING IN FINTECH

Dr. Yanan Wu, Chairman & CEO, Surfin-Meta
Dave Thornton, CEO & CIO, Vested
Moderator: **Mike Ashmore**, Co-Founder & CEO, Rondeivu

3:30 PM EST – 3:55 PM EST

NETWORKING BREAK

3:55 PM EST – 4:35 PM EST

APAC INVESTMENT OPPORTUNITIES

Jeff Li, CEO, Gopher Asset Management International, Noah Holdings
Matthew Hoffer, Founder & Principal, Spire Capital
Bill Lu, Founder & CIO, Aspetuck Capital Management
Moderator: **Gene Reilly**, CEO, Greenwich Quantitative Research

4:40 PM EST – 5:20 PM EST

INNOVATIONS IN DIGITAL ASSETS

Rachel Anderika, COO, Anchorage Digital Bank
Jamil Nazarali, CEO, EDX Markets
Randy Little, Partner, 1 RoundTable Partners / 10T Holdings
Moderator: **Tanaya Macheel**, Markets & Crypto Investing Reporter, CNBC

Agenda

WEDNESDAY, OCTOBER 4, 2023

5:25 PM EST – 5:35 PM EST

CLOSING REMARKS

Jim Aiello, Co-Chair, Greenwich Economic Forum

Bruce McGuire, Co-Chair, Greenwich Economic Forum

5:35 PM EST – 6:35 PM EST

COCKTAIL RECEPTION – SPONSORED BY BNY MELLON

Greenwich Business Institute

The Greenwich Business Institute produces global finance industry forums, meetings and events that convene business and government thought leaders for discussions on global trade, capital markets and investing. Its signature event, the Greenwich Economic Forum (GEF), is held each fall in Greenwich, CT.

Jim Aiello
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Bruce McGuire
Co-Chair, Greenwich Economic Forum
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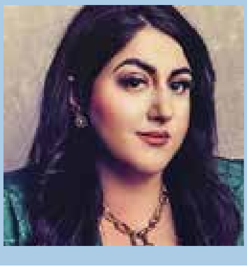
GEF 2023 Speakers



Maneet Ahuja

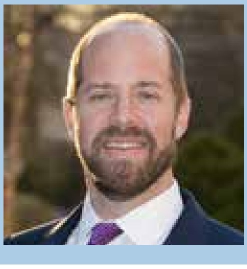
Founder & Editor-at-Large, ICONOCLAST | Forbes

Maneet Ahuja is a Senior Editor and Founder & Editor-at-Large of Iconoclast at Forbes, where she covers the intersection of Wall Street, billionaires & entrepreneurial capitalism.

Maneet holds the unique distinction of being the only journalist at Forbes to also be an alumnus of the celebrated Forbes Under 30 list for media. She has interviewed some of the world's most powerful and influential leaders ranging from U.S. President Bill Clinton to policymakers like long-standing former U.S. Federal Reserve Chairman Alan Greenspan to financial titans and business leaders like JPMorgan CEO Jamie Dimon and former Facebook COO Sheryl Sandberg.

Before joining Forbes, Maneet was awarded the prestigious Knight-Bagehot Fellowship at Columbia Journalism School and had over a decade-long tenure at CNBC, where she worked on major stories such as Lehman Brothers' collapse during the financial crisis and investigations into Herbalife. While at CNBC, she also co-founded Delivering Alpha, the network's flagship annual Wall Street summit and worked on Squawk Box where she launched coverage on hedge funds and alternatives. Prior to CNBC, she was a part of the Wall Street Journal's Money & Investing team and began her career on Wall Street at the age of seventeen working at Citigroup—which is where she earned the nickname "Wall Street Maneet."

She was also the host of Spotify's special-edition podcast Megatrends (Gimlet media, 2019) and author of The Alpha Masters: Inside the Genius of the World's Top Hedge Funds, which has been published in five languages and sold over 30,000 copies.



Jim Aiello

Co-Founder | Greenwich Economic Forum

Jim Aiello is the Co-Founder of Greenwich Economic Forum and Co-Chairman of Greenwich Business Institute, and has over 30 years of financial services and real estate experience. Jim's investment career began in management consulting in New York, focusing on business strategy and profitability related to the investment management and other finance and real estate-related industries, including working at First Manhattan Consulting Group, Goldman Sachs, and Salomon Brothers. The Greenwich Business Institute currently produces the Greenwich Economic Forum and associated alternative investment industry events. He earned his B.A. in Government from Harvard University.

Rachel Anderika

COO | Anchorage Digital Bank

Rachel Anderika is the Chief Operating Officer at Anchorage Digital Bank. She brings more than 15 years of experience in regulatory and risk management and nearly a decade of professional experience at the Office of the Comptroller of the Currency, where she served as National Bank Examiner (and later, Large Bank Examiner) to ensure that national banks operated safely and soundly, while complying with applicable laws and regulations. Rachel then served eight years in the private sector at Promontory Financial Group, a premier bank regulatory consulting firm, later purchased by IBM where she worked with numerous traditional financial institutions on risk management and compliance. Rachel also helped found Promontory's Digital Assets Risk and Compliance Team, where she guided digital assets custodians through the state and federal regulatory licensing process. Rachel is based in Connecticut and enjoys sailing her 99 year-old wooden boat in her spare time.

Mike Ashmore

Co-Founder & CEO | Rondeivu

Michael is Chair, Finance & Investment Committee at the University of Waterloo (C$3.3bn pension & endowment), Canada's leading tech university, where he is co-leading an initiative to foster "Ecosystem Capital" for UW-related startups. He is also CEO & Founder of Rondeivu, a Connecticut headquartered FinTech company and private markets deal platform.

Previously, Michael was a Director at OMERS (~US$100B Canadian pension plan), where he led investing efforts across external private equity & VC funds, co-investments, and hedge funds. Prior to OMERS, Michael was a Vice President at The Carlyle Group-DGAM, and prior to that, at PGGM in the Netherlands.

Chosen as one of Chief Investment Officer magazine's "2016 Forty Under Forty", and finalist for Institutional Investor magazine's 2017 "Next CIO" award. Michael is an avid athlete (skiing, triathlons, platform tennis, offshore fishing), and is actively involved in a number of charitable efforts, mainly focused on enabling youth education and opportunity.

Lisa Audet

Founder & CIO | Tall Trees Capital Management LP

Lisa Audet is the Founder and Chief Investment Officer of Tall Trees Capital Management LP which is executing a global, long/short equity strategy that invests in the energy transition. Lisa is responsible for security selection, risk management and overseeing the investment team. The Fund launched in April 2022 with a strategic investment from Tiger Management.

With 30+ years of experience across a diverse range of assets and industries, Lisa brings differentiated expertise in identifying, analyzing, and investing in long and short investment opportunities. Prior to founding Tall Trees Capital, Lisa spent 12 years at Discovery Capital Management, a global macro investment manager. From 2014-2018 she was responsible for energy and commodity investments within the firm's portfolio with an average annual exposure of $1.2 bn. Prior to joining Discovery, Lisa was a Senior Investment Analyst at Hartford Investment Management covering the Oil & Gas, Mining and Chemical sectors. Before that, she was a Vice President and Regional Director with HSBC Equator Bank Limited in Johannesburg, South Africa, where she managed structured lending to commercial banks and private sector clients in sub-Saharan Africa. Lisa has an undergraduate degree in International Studies from The American University. Additionally, she served in the U.S. Peace Corps and is fluent in Portuguese.

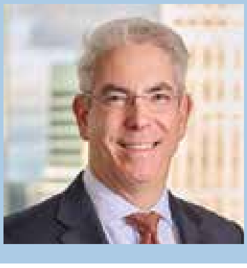
Finally, Lisa was honored on Forbes 50 Over 50 List for 2023 which honors women across four categories (Lifestyle, Impact, Innovation and Investment), who are creating their biggest impact in the world at 50 and beyond.

Sonali Basak

Anchor | Bloomberg

Sonali Basak is the primary Wall Street correspondent for Bloomberg Television, covering the largest financial firms globally. Her industry-wide newsletter can be found on LinkedIn under her profile and she frequently writes for Bloomberg News and Bloomberg Businessweek. She graduated from Bucknell University, Northwestern University's Medill School of Journalism for her journalism master's and has her MBA from NYU's Stern School of Business. She covers a lot of crypto, too.

GEF 2023 Speakers



Mark Baumgartner

CIO | The Carnegie Corporation of New York

Mark Baumgartner is Carnegie Corporation of New York's chief investment officer, responsible for overseeing the foundation's endowment.

Prior to joining the Corporation, he was CIO at the Institute for Advanced Study, a research institution supporting a community of scholars in Princeton, New Jersey. He has also served as director of asset allocation and risk at the Ford Foundation and as cohead of Morgan Stanley's Global Portfolio Solutions group.

Prior to Morgan Stanley, Baumgartner was a portfolio manager at two hedge funds: Quantal Asset Management, a quantitative equity market neutral fund, and Strategy Capital, a fundamental long/short equity fund. He began his career as a management consultant at the Boston Consulting Group, specializing in corporate venturing, mergers and acquisitions, and strategy development.

A member of the board of directors of The Investment Fund for Foundations (TIFF) and a trustee and chair of the investment committee for the YMCA Retirement Fund, Baumgartner has served on the board of directors and investment program committee for the Foundation Financial Officers Group (FFOG).

Baumgartner received a PhD in aerospace engineering and a certificate in public policy from Princeton University. He also holds the chartered financial analyst designation.

Afsaneh Beschloss

Founder and CEO | RockCreek

Ms. Beschloss is founder and CEO of RockCreek. Previously, she was Managing Director and Partner at the Carlyle Group. She was Treasurer and Chief Investment Officer of the World Bank and worked at Shell International and J.P. Morgan. Ms. Beschloss has advised governments, central banks, and regulatory agencies on global public policy and financial policy as well as energy policy. She led the World Bank's energy investments and policy work on areas including sustainable investing, renewable energy, power, and infrastructure projects to reduce carbon emissions and founded its Natural Gas Group as a transitional fuel.

Ms. Beschloss is Chair of PBS Foundation, and trustee of the Institute for Advanced Study, World Resources Institute, Council on Foreign Relations, Global Alliance for Vaccines, and Georgetown University.

She was recognized by Carnegie Corporation in their Great Immigrants, Great Americans 2020 list, received the Institutional Investor Lifetime Achievement Award and the Robert F. Kennedy Human Rights Ripple of Hope Award, and been listed among the "Most Powerful Women in Banking" by American Banker.

Richard Blumenthal

U.S. Senator from Connecticut | United States

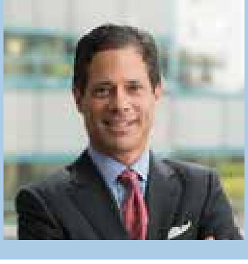
In 2010, Senator Blumenthal was elected to represent Connecticut in the United States Senate. He was reelected in 2016 and 2022.

In the Senate, Senator Blumenthal has built on his longtime advocacy for consumers by holding companies accountable for the safety of their products. He has pushed GM to fix its cars' fatal defects, fought to keep dangerous nicotine products out of the hands of children, and worked to make communities safe from hazardous chemicals. As chair of the Commerce Consumer Protection subcommittee, he led hearings and legislation to hold tech platforms like Facebook, Google, Twitter, and TikTok accountable for privacy failings, toxic and illegal content, and other serious harms.

Senator Blumenthal is also working to bring Connecticut's transportation systems and infrastructure into the twenty-first century. Working with Connecticut's Congressional Delegation, he has secured billions of dollars of federal funding to improve rail safety, promoted climate resiliency, and protected Long Island Sound and Connecticut's rivers and streams.

He has spearheaded legislation to support veterans by expanding employment opportunities, increasing housing access, holding the VA accountable, and providing health care for those exposed to toxic chemicals during their service including Blue Water Navy Vietnam Veterans and veterans working near burn pits in Iraq and Afghanistan. Senator Blumenthal authored the Clay Hunt Suicide Prevention for American Veterans Act, a bipartisan law to improve mental health care and suicide prevention resources.

Senator Blumenthal is a member of the Committee on the Judiciary, Committee on Homeland Security & Governmental Affairs, Committee on Armed Services, Committee on Veterans' Affairs, and Special Committee on Aging.



Lawrence Calcano

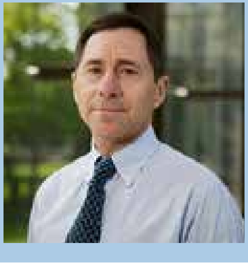
Chairman & CEO | iCapital

Lawrence is Chairman and CEO of iCapital. He began advising and working with iCapital shortly after its 2013 founding, leading key strategic and business development initiatives, before joining full time as CEO in early 2014. Since then, he has led the rapid growth – both organic and through acquisition – of iCapital, building it into a leading global Fintech company.

The majority of Lawrence's career has focused on the meeting point of finance and technology. At Goldman, Sachs & Co., where he worked for 17 years, he was a partner & managing director, most recently serving as the co-head of the Global Technology Banking Group (part of the Investment Banking Division), focusing on all aspects of technology including the internet & e-commerce, software, services & hardware. He has also worked as director of various digital & e-commerce businesses, as well as a series of acquisition vehicles.

Outside of technology, Lawrence's other passion is mental health & wellbeing, and this has led him to serve as a director of Vibrant Emotional Health (formerly the Mental Health Association of NY) for 10 years.

Lawrence received a BA from the College of the Holy Cross and graduated from the Amos Tuck School of Business at Dartmouth College as a Tuck Scholar. He was named to the Forbes Midas List of the most influential people in venture capital in 2001, 2002, 2004, 2005 and 2006.



Pablo Calderini

President & CIO | Graham Capital Management

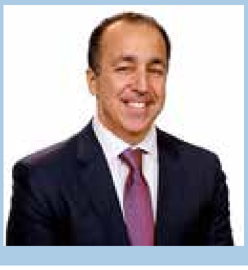
Pablo E. Calderini is the President and Chief Investment Officer of Graham Capital Management (Graham) and is responsible for the management and oversight of the discretionary and systematic trading businesses at Graham. Mr. Calderini is also a member of the firm's Executive, Investment, Risk, and Compliance committees. He joined Graham in August 2010. Prior to joining Graham, Mr. Calderini worked at Deutsche Bank from June 1997 to July 2010 where he managed several business platforms including Equity Proprietary Trading, Emerging Markets, and Credit Derivatives. Mr. Calderini received a B.A. in Economics from Universidad Nacional de Rosario in 1987 and a Masters in Economics from Universidad del CEMA in 1989, each in Argentina.

Don Casturo

Founding Partner & CIO | Quantix Commodities

Don has 26 years of experience in commodity markets. He had a 20 year career at Goldman Sachs where he was a Partner in the commodity group. From 2015-2018 he was Head of Commodity Trading for all of EMEA. Prior to that he served as Global Commodities COO and managed the Global Investor Products Desk from 2007-2013. In addition, he was the lead Crude Derivatives trader from 1998-2006, member of the LME User Committee, member of the CFTC Market Advisory Committee and speaker at the Position Limit Hearing in 2008.
Don has an MS in Mechanical Engineering from Stanford University and an MBA from the Fuqua School of Business at Duke University.

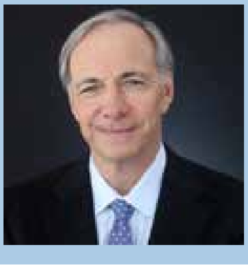
GEF 2023 Speakers



James Costabile

Managing Director, Head of Alternatives Distribution | iCapital

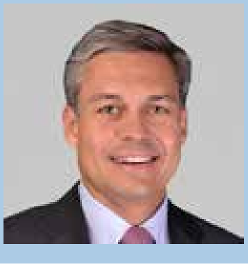
James is a Managing Director and Head of Alternatives Distribution on iCapital's Private Wealth Solutions team. In this role, James oversees a team of regional sales and national accounts professionals that work with top registered investment advisors, financial advisors, and financial intermediaries. James and his team deliver industry leading alternative investment education, research viewpoints, and investment capabilities across hedge funds, private equity, private credit, and real estate strategies. James brings more than 25 years of financial services experience and began working with alternative investment strategies in 1997. Over this time, he has held roles across sales, marketing, and product management at Citi / Smith Barney, Merrill Lynch and most recently, Morgan Stanley Investment Management. James graduated from Fordham University with a Bachelor of Science, holds FINRA Series 7, 24, and 66 licenses, and is a CAIA charter holder.



Ray Dalio

Founder, CIO Mentor and Member of the Board | Bridgewater Associates

In 1975, Mr. Dalio founded an investment firm, Bridgewater Associates, out of his two-bedroom apartment in New York City. Over forty years later, Bridgewater has grown into the fifth most important private company in the United States, according to Fortune magazine, and Dalio himself has been named to Time magazine's list of the 100 most influential people in the world. Along the way, Dalio discovered a set of unique principles that have led to Bridgewater's exceptionally effective culture, which he describes as "an idea meritocracy that strives to achieve meaningful work and meaningful relationships through radical transparency."



Kipp deVeer

Director, Partner & Head of Credit Group | Ares Management

Mr. deVeer is a Director and Partner of Ares Management Corporation and Head of the Ares Credit Group. He is a member of the Ares Executive Management Committee and the Ares Diversity, Equity and Inclusion Council. He also serves as a Director and Chief Executive Officer of Ares Capital Corporation. Mr. deVeer is a member of the Ares Credit Group's U.S. Direct Lending, European Direct Lending and Pathfinder Investment Committees. Prior to joining Ares in 2004, Mr. deVeer was a partner at RBC Capital Partners, a division of Royal Bank of Canada, which led the firm's middle market financing and principal investment business. Mr. deVeer joined RBC in October 2001 from Indosuez Capital, where he was Vice President in the Merchant Banking Group. Previously, Mr. deVeer worked at J.P. Morgan and Co., both in the Special Investment Group of J.P. Morgan Investment Management, Inc. and the Investment Banking Division of J.P. Morgan Securities Inc. Mr. deVeer received a B.A. from Yale University and an M.B.A. from Stanford University's Graduate School of Business.

Mike Dieber

Partner, Co-Head of Portfolio Management, U.S. Direct Lending | Ares Management

Mr. Dieber is a Partner and Co-Head of Portfolio Management, U.S. Direct Lending, in the Ares Credit Group. He serves on the Ares Credit Group's U.S. Direct Lending and Commercial Finance Investment Committees. Prior to joining Ares in 2008, Mr. Dieber was a Managing Director at Conway, Del Genio, Gries & Co., a financial advisory boutique with a focus in restructuring. Previously, Mr. Dieber was a Partner in the Restructuring Group at Ernst & Young LLP. Mr. Dieber began his career in the audit practice of Ernst & Young. He holds a B.S. in Economics from the University of Pennsylvania Wharton School.

Lisa Donahue

Co-Head of the Americas & Asia | AlixPartners

Lisa Donahue is the Co-Head of the Americas & Asia at AlixPartners. She previously served as the Global Co-Lead of the Turnaround & Restructuring practice. She guides underperforming companies through complex operational turnarounds in the roles of Chief Executive Officer, Chief Restructuring Officer, and Chief Transition Officer. She most recently served as an advisor to AeroMexico airlines, and was previously the Chief Development and Transition Officer at Westinghouse, and prior to that was the Chief Restructuring Officer for the Puerto Rico Electric Power Authority. She is a previous board member of AlixPartners, and currently serves on the boards of The Nucleus Group and Tina's Wish. Lisa is a member of the Council on Foreign Relations and lives in New York City.

Bryan Donohoe

Partner, Co-Head of U.S. Real Estate | Ares Management

Mr. Donohoe is a Partner and Co-Head of Ares U.S. Real Estate. He is also the Chief Executive Officer of Ares Commercial Real Estate Corporation. Additionally, Mr. Donohoe serves on the Ares Real Estate Global Investment Committee and the Ares Real Estate Debt Investment Committee. Prior to joining Ares in 2019, Mr. Donohoe was a Managing Director for Commercial Real Estate Debt in AllianceBernstein's Real Estate Investment Group. Previously, Mr. Donohoe was a Senior Professional at Ranieri Real Estate Partners. In addition, Mr. Donohoe spent 10 years at Deutsche Bank, where he focused on originating, structuring and closing of first mortgage loans, B notes and mezzanine debt. Mr. Donohoe holds a B.A. from Middlebury College in Political Science.

Emily Dreas

Managing Director and Market Executive | Bank of America Private Bank

Emily Dreas is a Managing Director and Market Executive for Bank of America Private Bank, responsible for the Southern Connecticut market. She leads a client relationship team that delivers investment, credit and banking services, wealth structuring as well as individual and institutional philanthropic services. She is also responsible for providing local clients with access to the investing insights of Merrill.

Prior to joining Bank of America Private Bank (formerly U.S. Trust) Dreas served as the Head of Client Development at Fiduciary Trust Company International, where she led a team of wealth directors focused on complex trust and investment planning. She was also responsible for strategic growth priorities including Next Gen and family offices. Additionally, Dreas served on both the operating and management committees. Previously, Emily led the Private Bank for Wells Fargo Connecticut, managing a group of investment, trust, brokerage and credit leaders, and their subsequent teams across the Connecticut footprint from Greenwich to Hartford. She also held positions as Regional Investment Manager and Investment Strategy Specialist for the Northeast.

Dreas also served in London as an Investment Director with Citigroup Asset Management, representing investments to its Private Bank clients in Southern Europe.

Dreas received a Bachelor of Science degree from Vanderbilt University. She currently supports a number of philanthropic endeavors in the Fairfield County area, where she serves on the board of Sound Waters.

She lives in Rowayton with her husband and three children.

GEF 2023 Speakers

Mohamed El-Erian

President of Queens College at Cambridge University
Chair of Gramercy and Adviser to Allianz

Dr. El-Erian is a renowned economist and leader in emerging markets investment and research, having previously held senior roles in investment management and international policymaking. He was on Foreign Policy's list of Top 100 Global Thinkers for four years in a row. In his new role at Gramercy, Dr. El-Erian's Senior Advisor responsibilities and duties shall include, but not be limited to, the following activities: (i) providing global, regional and country perspectives on economic, market and geopolitical developments; (ii) offering perspectives on a range of investment-related matters (in particular, global investment trends and emerging asset classes); (iii) helping to decode economic and policy developments, focusing on the potential way they may impact emerging markets; (iv) developing macro themes that inform and perhaps even influence individual trades and client communications; and (v) advising on specific investment issues, including multi-asset allocations.

Dr. El-Erian was most recently CEO and Co-Chief Investment Officer of PIMCO (2007-14), which he originally joined in 1999 to lead its emerging markets portfolio management business. Dr. El-Erian served as Chairman of the U.S. Government's Global Development Council under President Obama, spent 15 years at the International Monetary Fund, where he was a Deputy Director, and was CEO and President of the Harvard Management Company. He also spent time as a managing director at Salomon Smith Barney/Citigroup in London. Dr. El-Erian is a member of the IMF's External Advisory Group on Surveillance and MIT's Visiting Committee for the Department of Economics, and sits on several non-profit boards as well as Under Armour's. He is a contributing editor at the Financial Times and a columnist at Bloomberg, in addition to having written two best-selling books on economics and finance.

Dr. El-Erian received a B.A. and an M.A. from Cambridge University in economics, and an M.Phil and doctorate from Oxford University.

James Fontanella-Khan

U.S. Corporate Finance and Deals Editor | Financial Times

James Fontanella-Khan is US corporate finance and deals editor at the Financial Times covering deals across America. Previously he worked on Lex and as a correspondent in Brussels, New Delhi and Mumbai. He started his career at the FT in London on the news desk in 2005. He graduated at Science Po, Paris.

Harold Ford, Jr.

Regional President | PNC Bank

Harold Ford, Jr. is a former congressional representative and now serves as an executive vice president and regional president of PNC Bank, New York. In this role, Ford is responsible for new business development and deepening relationships with clients and community organizations. Prior to being named to his current role in February 2023, Ford served as vice chairman of Corporate & Institutional Banking (C&IB) for PNC Bank.

Before joining PNC in December 2020, Ford was a director of Live Oak Acquisition Corporation, a blank check company founded in 2020. He served in Congress for 10 years from 1997 to 2007 representing Tennessee's 9th congressional district and was a member of the House Financial Services, Budget and Education Committees as well as the Congressional Black Caucus.

After serving in the House of Representatives, Ford spent four years as vice chairman and senior policy advisor of Bank of America Merrill Lynch, seven years at Morgan Stanley, where he was a managing director and senior client relationship manager, and is the former non-executive chairman of Rx Saver, a patient-directed prescription medication search engine platform. Ford has also taught public policy at Vanderbilt University and the University of Michigan.

Ford currently serves on the board of directors of the Lincoln Center, The POSSE Foundation and the River Fund New York.

Ford received a B.A. in American History from the University of Pennsylvania and a J.D. from the University of Michigan Law School.

Pooja Goyal

Partner and Chief Investment Officer Infrastructure Group | The Carlyle Group

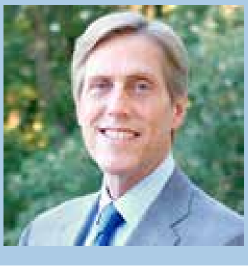
Pooja Goyal is a Partner and Chief Investment Officer of Carlyle Global Infrastructure, Co-Head of the Carlyle Global Infrastructure Opportunity Fund (CGI), and Head of Renewable and Sustainable Energy. She is based in New York.

Prior to joining Carlyle, Ms. Goyal was the Head of the Alternative Energy Investing Group at Goldman Sachs, where she led Goldman Sachs' investments in the renewables sector. Ms. Goyal has been investing in the renewables sector since 2005 when she joined the Alternative Energy Investing Group as an associate. She was promoted to Managing Director in 2012 and took over as Head of the group in 2013. Under her leadership, the group built a portfolio of investments dedicated to the renewable energy and sustainable resources sector. The portfolio consisted of investments via debt, equity and tax equity instruments, ownership of assets and portfolios of assets.

As part of her role, Ms. Goyal has spoken at several industry conferences, including the Goldman Sachs Sustainable Finance Innovation Forum. She has held several board and committee positions including the boards of Vivint Solar and the American Council of Renewable Energy and the investment committees at Altus Power and Goldman Sachs' Americas Special Situations Group. Prior to 2005, Ms. Goyal was part of the Investment Banking Division at Goldman Sachs.

Ms. Goyal is a graduate of University of Pennsylvania, where she received a BS in finance from the Wharton School and a BAS in computer and cognitive science from the School of Engineering and Applied Sciences. Ms. Goyal is on the Board of Advisors of the School of Engineering and Applied Sciences at the University of Pennsylvania and on the Board of Trustees for the Ethical Culture Fieldston School in New York City.

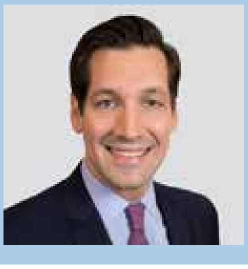
GEF 2023 Speakers



David Graham

CIO | AmFam Group

Mr. Graham is the Chief Investment Officer of The AmFam Group. Prior, he served as the Head of Fixed Income and the Head of Asset Allocation at PartnerRe. Additionally, Mr. Graham was head of fixed income investments at Lazard Asset Management, including running the fixed income team in London. He has also served as a portfolio manager of most fixed income asset classes, including MBS, credit and HY as well as fixed income hedge funds.



Justin Gregory

Senior Portfolio Manager | Hildene Capital Management

Justin Gregory is Portfolio Manager at Hildene Capital Management. In this role, he is responsible for sourcing, investment analysis and execution of investments.
Prior to joining Hildene, Mr. Gregory was a Portfolio Manager at Axonic Capital LLC, where he specialized in the sourcing, structuring, trading and portfolio management for residential, commercial, asset-backed and esoteric structured products. Before Axonic, he was a Vice President at Deutsche Bank AG on the Non-Agency Residential Mortgage Trading Desk. Prior to that, he was a Vice President at Hudson Advisors/Lone Star Funds responsible for trading mortgage and asset-backed loans and securities. Mr. Gregory began his career at Goldman Sachs & Co. on the mortgage desk where he traded and structured Alt-A securities.
Mr. Gregory received a BA in Economics from the University of Michigan and is a CFA® charterholder.

Wycliffe Grousbeck

Lead Owner, Governor & CEO | Boston Celtics

Wyc Grousbeck became Lead Owner, Governor and CEO of the Boston Celtics in 2002. In 2008, the Celtics won their 17th championship, beating the Lakers by 39 points in the final game. Wyc is on the Executive, Media, and Labor Relations Committees of the NBA.

Wyc is also a venture investor; tequila entrepreneur; co-creator of an NBC sitcom planned to premiere in spring 2024; drummer and guitarist in two Boston based bands; and charitable supporter.

He co-founded Causeway, a sports and tech venture firm managing $335 million. Wyc and his wife Emilia Fazzalari co-founded Cincoro Tequila with three other NBA owners: Michael Jordan (Charlotte Hornets), Jeanie Buss (LA Lakers), and Wes Edens (Milwaukee Bucks). Cincoro launched in 2019 and has sold 2 million bottles to date. Emilia is the CEO.

Wyc is the former Chair of Mass Eye and Ear, a world leader in fighting blindness and deafness. He raised over $250 million for the institution.

Wyc attended Princeton University (BA,1983), where his crew went undefeated and claimed the national championship; the University of Michigan (JD, 1986); and Stanford Business School (MBA, 1992).

Anders Hall

CIO | Vanderbilt University

Anders W. Hall serves as the university's vice chancellor for investments and chief investment officer. He leads the Office of Investments, where he is responsible for managing the university's $10 billion long-term investment pool, including the endowment.

Vanderbilt's endowment serves as the financial underpinning for the university's mission of teaching, cutting-edge research and service. The mission of the Office of Investments is to produce strong investment results and provide a perpetual source of financial support to educate students, attract and retain faculty, and bolster academic programs for generations to come.

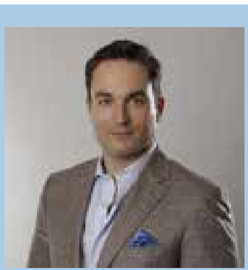
Hall came to Vanderbilt in September 2013 from Duke University, where he worked for over a decade as head of public securities for DUMAC, the university's investment management company. He oversaw public investments for the Duke University endowment, pension plan, health system's long-term assets, and the Duke family foundation.

Prior to that, Hall was an investment consultant with Hewitt Investment Group in Rowayton, Connecticut, and Atlanta, Georgia, where he advised approximately 20 institutional clients. They included the New York Stock Exchange, Freddie Mac, and the University of Alabama System. He also spent three years in the Prudential Advanced Management Development Program, a highly-selective leadership training program based in Newark, New Jersey.

Hall, a chartered financial analyst, double-majored in public policy studies and economics at Duke University, where he earned a bachelor of arts in 1993. He earned an MBA from the New York University's Stern School of Business, where he majored in finance and economics and graduated with high honors in 1999.

Hall serves on the boards of Big Brothers Big Sisters of Middle Tennessee, the Kharis Foundation, the Pi Kappa Phi Foundation, Rock the Street Wall Street and The Healing Trust. Additionally, Hall is a member of the governing board of Westminster Presbyterian Church. He previously co-chaired the Annual Fund at University School of Nashville.

Hall lives in Nashville with his wife, Joanna, and their three children.



Matthew Hoffer

Founder & Principal | Spire Capital

Matthew is the Principal and co-founder of Spire Capital, a family-backed investment firm headquartered in Pfäffikon, Switzerland, on the shores of Zurich lake. The firm focuses primarily on private markets direct investments, from seed to pre-IPO.

Matthew holds a Masters degree from the Fletcher School of Law and Diplomacy at Tufts University, and a bachelor's degree from Bath University in the UK. He speaks six languages, including Arabic. Previously, he was Head of Government Affairs for the Middle East at the World Economic Forum in Geneva, and at JPMorgan Investment Bank in London working in structured equity derivatives sales.

Kurt Hoffman

Managing Director, Corporate Credit | Apollo

Kurt Hoffman is Managing Director, Corporate Credit and is Co-Head of Underwriting for US Direct Lending at Apollo. Prior to joining the firm in 2022, Kurt was a Managing Director in the Investment Banking Group at Goldman Sachs. Prior to that, Kurt was a Partner at Imperial Capital.

Kurt received a JD degree from Washington University and is a graduate of Saint Louis University with a BS degree in Accounting.

GEF 2023 Speakers

Brad Jacobs

Executive Chairman | XPO

Brad Jacobs is executive chairman of XPO Logistics, Inc. (XPO: NYSE), one of the world's largest providers of freight transportation services. He also serves as non-executive chairman of GXO Logistics, Inc. (NYSE: GXO), the world's largest pure-play logistics company.

Brad has a unique track record in the business world. He started five companies from scratch and built each into a billion or multi-billion-dollar enterprise. These include three publicly traded companies: XPO Logistics, United Rentals and United Waste Systems. XPO was the 7th best-performing stock of the last decade on the Fortune 500 based on Bloomberg data, and all three companies were "ten-plus baggers," with their share prices rising more than 1,000% from the time Brad took control.

Over the course of his career, Brad has completed approximately 500 acquisitions, raised more than $25 billion of debt and equity capital, and created iconic organizations that have transformed industry practices through technology.

Jacobs was ranked the Best CEO in Transportation in Institutional Investor's 2022 All-America Executive Team awards. In 2018, Jacobs was ranked 10th on Barron's list of the World's Best CEOs and was named a Top CEO by Glassdoor in France and the UK.

Jenny Johnson

President & CEO | Franklin Templeton

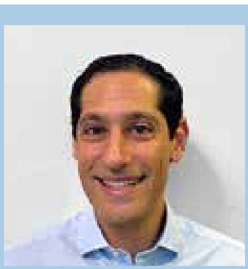
Jenny Johnson is President and Chief Executive Officer of Franklin Templeton. In a career spanning 35 years, she has been a key driver of the company's transformation to what is now one of the largest global investment managers with over $1.4 trillion in assets under management.

Ms. Johnson held leadership roles in all major divisions of the business-including investment management, distribution, technology, operations and wealth management-before becoming CEO in February 2020. She has led the evolution of the business in recent years, further diversifying the company's investment capabilities and solutions for clients through key strategic acquisitions and investments.

Ms. Johnson has received many recognitions, including being named to Forbes' "World's 100 Most Powerful Women" and "50 Over 50" lists in 2022. She has been named to Barron's list of the "100 Most Influential Women in US Finance" for four consecutive years, most recently in 2023. She was also named to Pensions & Investments' inaugural class of "Influential Women in Institutional Investing" in 2023.

Ms. Johnson serves on a variety of boards, including the International Advisory Panel of the Monetary Authority of Singapore, the NYSE Board Advisory Council and, in 2023, was appointed to the US-Brazil CEO Forum. Additionally, Ms. Johnson is a board member of the Memorial Sloan Kettering Cancer Foundation, Thermo Fisher Scientific and Catalyst. Previously, she has served on several other boards, including Stanford's Lucille Packard Children's Hospital and the San Francisco Giants.

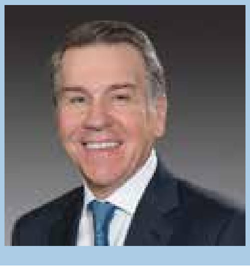
Ms. Johnson earned her B.A. in economics from the University of California at Davis.



Matt Kaplan

President & CEO | Great Elm Capital Corp

Matt Kaplan has served as the Chief Executive Officer and President of Great Elm Capital Corp. (NASDAQ: GECC), a publicly traded Business Development Company, since March 2022, and Mr. Kaplan is also the President of Great Elm Capital Management ("GECM"), the external investment manager of GECC. Mr. Kaplan has also served as a Portfolio Manager for GECM since October 2020, joining after spending four years at Citadel LLC from 2015 to 2019 investing in special situations and event-driven credit and equities. Previously, Mr. Kaplan served as a Senior Vice President of Imperial Capital UK from 2014 to 2015, advising on special situations and complex transactions. Prior to Imperial Capital UK, Mr. Kaplan worked in research with Imperial Capital US from 2007 to 2014. Mr. Kaplan earned a B.S. in Managerial Economics from the University of California, Davis.



Ken Kencel

President & CEO | Churchill Asset Management

Ken serves as President and CEO of Churchill Asset Management, an affiliate of Nuveen, the asset management arm of TIAA, a Fortune 100 financial services company. He also serves as Chairman of the Board, President and CEO of Nuveen Churchill Direct Lending Corp., Churchill's publicly registered business development company.

Churchill currently manages over $46 billion in committed capital and focuses on providing senior, unitranche and junior debt financing and making equity co-investments and fund commitments to leading private equity investment firms and their portfolio companies. Churchill is among the most active private capital managers in the U.S., annually investing approximately $11 billion in over 375 distinct transactions.

Throughout his over 35-year career in the investment industry, he has accrued a broad range of experience in leading private credit investment businesses. Previously, Ken served as a Managing Director of The Carlyle Group, where he also served as President and a Director of Carlyle Secured Lending, Inc. (Carlyle's publicly traded business development company). Prior to that he founded and was President and CEO of Churchill Financial Group, served as Head of Leveraged Finance for Royal Bank of Canada and was Head of Indosuez Capital, a leading middle market merchant banking and asset management business in partnership with Credit Agricole Group. Ken was also a founder of the high yield finance business at Chase Securities (now JP Morgan Chase). He began his career in the Mergers & Acquisitions Group at Drexel Burnham Lambert. He regularly appears as a guest commentator on private credit markets on Bloomberg, CNBC, The Wall Street Journal and The Financial Times.

Ken graduated with a B.S. in Business Administration, magna cum laude, from Georgetown University and a J.D. from Northwestern University Pritzker School of Law. He serves on the Pension Investment Advisory Committee for the Archdiocese of New York, the Board of Trustees and Chairman of the Investment Committee of Canisius High School (a private Jesuit Preparatory school in Buffalo, NY) and the Advisory Board of Teach for America (Connecticut). Ken is a former member of the Board of Advisors and Adjunct Professor at the McDonough School of Business at Georgetown University.

Ned Lamont

Governor | State of Connecticut

Edward Miner "Ned" Lamont, Jr. was sworn into office on January 9, 2019 as the 89th governor of Connecticut.

Governor Lamont got involved in public service shortly after college, founding a weekly newspaper in a town hit by the loss of its largest employer. Covering town meetings and the Board of Selectmen, he helped to bring voice and transparency to a community working to recover from job losses and reinvent itself. Later, as a member of both the Greenwich Board of Selectmen and the Board of Estimate and Taxation, Governor Lamont worked in a bipartisan effort to safeguard a multimillion-dollar budget and deliver results for constituents. For four years, he also served as Chairman of the State Investment Advisory Council, overseeing a multibillion-dollar state pension fund.

Governor Lamont started his own company, taking on the large and established giants of the telecom industry. Under his vision and stewardship, the company grew to serve over 400 of America's largest college campuses and 1 million college students across the nation.

As a volunteer teacher, he sought to give back to his community by volunteering at Harding High School in Bridgeport. In an effort to spark entrepreneurship, He taught students about the inner-workings of small businesses, bringing in local business people to share their own experiences, and helping to place students in local internships. Lamont is on the faculty of Central Connecticut State University as an adjunct professor of political science and philosophy, where he also helped to found a popular business start-up competition. In early 2009, he helped lead an initiative to bring together Connecticut leaders from across the business, nonprofit, and labor sectors to unite in a strategy to create new jobs in the state.

After graduating Phillips Exeter in 1972, he earned a Bachelor of Arts in sociology from Harvard College in 1976 and a Master of Business Administration from the Yale School of Management in 1980.

GEF 2023 Speakers

Kamaron Leach

Reporter | Bloomberg News

Kevin Hart. Will Ferrell. Queen Latifah. Byron Allen. Taraji P. Henson. Spike Lee. Kamaron has interviewed them all.
Kamaron Leach is a next-generation media personality and journalist from Atlanta, Georgia. Residing in New York City, he currently works as a reporter for Bloomberg News contributing on and off camera covering current events, business and entertainment news. But Kamaron's presence has also been seen on a variety of other news outlets, including: BET, ABC and CBS Television owned stations, The Grio, MSNBC and more.
Known for his charming southern personality and approachability amongst Hollywood's biggest stars, Kamaron has scored a number of high-profile interviews spanning the entertainment and news industry. His journey into the business began to brew with a high school internship at People TV, a Comcast-owned public access channel back home in Atlanta. From there Kamaron went on to attain a Bachelor of Arts degree in Broadcast Journalism and Economics from Howard University, where he also became a member of Kappa Alpha Psi Fraternity, Inc.
It was out of these countless opportunities that Kamaron founded his company — Leach Media Ventures — at the age of seventeen. In such a competitive industry, he truly believes that 10,000 hours is only the standard and not the bar.

Jeff Li

CEO | Gopher Asset Management International, Noah Holdings

Jeff has 28 years of executive management experience in the financial industry in US and China, specializing in hedge fund investment, operations, asset allocations, quantitative investment strategies and digital wealth management. He is currently the CEO of Gopher Redwoods Asset Management International Ltd, wholly owned by Noah Holding (NYSE:NOAH).

From 2018 to 2021, Jeff held various senior positions in the wealth management companies in China. He was the Chief Product Officer of Lufax Holding (NYSE:LU), where he was responsible for developing the company's financial product strategy, innovation and execution. He was also a member of the Executive Committee of PingAn Group and member of the 1 st Shanghai QDLP Advisory Committee.

Jeff co-founded and acted as CEO of Sycamore Investment Services – a technology empowered investment advisory company in China in 2016, specializing in hedge fund analytics and investment services. The company completed its strategic sale to PingAn Group in 2018.

In 2004 Jeff co-founded OpHedge Investment Services with SFM and PGAM, which became the world's 7th largest independent hedge fund administrator and successfully completed the strategic sale to CITCO in 2010, and continued to serve as CEO of CITCO (China). Jeff started his career in finance with hedge fund Long-Term Capital Management in Greenwich, US in 1997, as an investment strategist developing trading strategies and investment models. He later served as Vice President of the Equity Quantitative Strategies Group of Goldman Sachs & Co in New York responsible for program trading strategies development.

Randy Little

Partner | 1RoundTable Partners / 10T Holdings

Randy Little is a Partner of 1RT and 10T Holdings LLC with 25+ years of experience in roles at the intersection of finance and technology. From 2018 to 2023, Mr. Little served as Managing Director at Financial Technology Partners (“FT Partners”), the largest investment bank solely focused on FinTech globally. He exclusively focused on the Digital Asset and Capital Markets FinTech sectors, advising dozens of clients including pending capital raises of $500 million to $1 billion for institutional blockchain infrastructure companies.

Mr. Little entered investment banking in 2006 at J.P. Morgan in the Financial Institutions Group focused on the Market Structure and WealthTech sectors. He was an early leader in advising the quantitative trading sector leading to several landmark transactions in the market-making space as well as executing public and private deals for exchanges, broker-dealers, trading technology, and WealthTech firms.

Before joining J.P. Morgan, Mr. Little was a Software Architect at Sun Microsystems with a focus on optimizing hardware and software for low-latency environments in the financial services sector. He also served as a Senior Consultant for Ernst & Young Consulting, where he led software development projects for large-cap financial services and U.S. government clients.

Mr. Little earned an MBA from NYU Stern in 2005, where he graduated as a Stern Scholar, and received a BS in Computer Science and Mathematics from Wake Forest University in 1997.

Bill Lu

Founder and CIO | Aspetuck Capital Management

Dr. Bill Lu, founder and CIO, has 20 years of research, investment and management experience in global asset management industry. He is also founder and CIO of INclusive Digital Advisor, a U.S.-based robo-advisor platform. Before founding Aspetuck Capital, Bill was President and Deputy Chief Investment Officer at Ortus Capital Management from February 2011 to December 2012, a Hong Kong-based hedge fund that manages quantitative macro/FX strategies. From October 2009 to February 2011, he was Managing Director at China Investment Corporation based in Beijing, where he was in charge of hedge fund investments and managed a portfolio of over $12 billion for the sovereign wealth fund.

From January 2004 to October 2009, Bill was Quantitative Portfolio Manager and Head of China Operations at Tudor Investment Corporation based in Connecticut. Prior to Tudor, Bill had various research roles including as a Quantitative Researcher at QFS Asset Management, a FX/Macro hedge fund based in the U.S., and Assistant Professor of Finance at Ross School of Business, University of Michigan. He received his Ph.D. in Economics from Yale University in 1998 and B.A. in International Finance from Fudan University (Shanghai, China) in 1991.

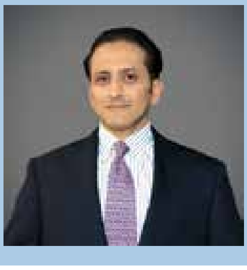
Tanaya Macheel

Markets and Crypto Investing Reporter | CNBC

Tanaya covers crypto for the markets and PRO teams at CNBC and is one of the hosts of CNBC’s “Crypto World,” a digital show dedicated to covering the latest news and daily trading updates in crypto. She joined the company in 2021 and is based out of CNBC Global Headquarters in Englewood Cliffs, N.J.

She has spent her career covering financial services and the future of money – including cryptocurrency and blockchain technology, payments, and retail banking and investing companies. Prior to CNBC she served as a crypto and fintech correspondent at Cheddar and co-anchored its weekly cryptocurrency show, The Crypto Craze, from the floor of the New York Stock Exchange. She’s also worked at several industry publications, including CoinDesk and American Banker.

GEF 2023 Speakers



Jay Madia

Head of Risk Assets | AXIS Capital

Mr. Madia is responsible for credit, equity, real estate, and private market investments for global insurance company, AXIS Capital, with $15 billion in assets under management. Prior to AXIS, Mr. Madia was Deputy Chief Investment Officer of PartnerRe. Before joining PartnerRe, he managed investments for JPMorgan & Co. Mr. Madia holds a B.A. from Harvard College and and MBA from Columbia Business School.

Saira Malik

CIO | Nuveen

Saira is Nuveen's Chief Investment Officer (CIO). In this role, she drives weekly market and investment insights and delivers client asset allocation views from across the firm's investment teams. Saira also leads the Global Investment Committee (GIC), bringing together Nuveen's most senior investment leaders to deliver the best thinking and actionable portfolio allocation ideas for our clients across institutional and wealth channels. As Chair of the Equities Investment Council (EIC), she authors a monthly market commentary. Additionally, Saira is portfolio manager for $100+ billion in equity strategies. She also serves as the sole manager of a multi billion global equity portfolio.

Since joining the firm in 2003, Saira has held a variety of positions. Prior to being named CIO, she was head of global equities portfolio management, and before that, head of global equities research. Previously, Saira was with JP Morgan Asset Management, where her roles included vice president/small cap growth portfolio manager and equity research analyst.

Saira holds the CFA designation and graduated with a B.S. in Economics from California Polytechnic State University, San Luis Obispo, and an M.S. in Finance from the University of Wisconsin, Madison. She frequently appears on financial news networks such as CNBC, Bloomberg and Fox Business. Saira has been profiled in Kiplinger's and Barron's, which ranked her among the top 100 most influential women in U.S. finance.

Brooke Masters

US Financial Editor | Financial Times

Brooke Masters is US Financial Editor at the Financial Times. She leads news coverage of American nonbank finance and writes a biweekly column on global business for the opinion section. She joined the FT in New York in 2006 from the Washington Post and recently returned to the US after spending more than a decade in the FT's London headquarters. There, she served as chief business commentator, opinion and analysis editor and companies editor. Over the course of her career, she has covered politics, criminal justice, education, financial services, regulation and white-collar crime. The author of a book about Eliot Spitzer, she earned degrees from Harvard University and the London School of Economics and is the mother of two grown children.

Bruce McGuire

Co-Founder | Greenwich Economic Forum

Bruce McGuire is the Co-Founder of the Greenwich Economic Forum, Co-Chairman of Greenwich Business Institute, and Founder and President of the Connecticut Hedge Fund Association. Bruce is an attorney and a 26-year veteran of Wall Street, having held officer level positions at top firms, including Goldman Sachs and Bank of America Merrill Lynch. Sought out for his advice and counsel, Bruce is a Director of the Greenwich Chamber of Commerce, the Connecticut-China Council, and he serves on Dean John Quelch's Finance Advisory Board at the University of Miami Herbert School of Business. Bruce is a graduate of the University of Miami and is a member of the Connecticut Bar.

Bruce's commentary on the economy and the alternative investment industry have appeared in The Wall Street Journal, The New York Times, The Financial Times, The Economist, Bloomberg, China Daily, and many other publications. In addition, Bruce has done segments on the hedge fund industry for China's CCTV, and TV Tokyo.

Allison McNeely

Reporter | Bloomberg

Allison McNeely is a reporter covering private equity for Bloomberg News in New York. She previously covered credit markets for Bloomberg, including distressed debt and restructuring, as well as Canadian corporate finance. Originally from Canada, Allison has a Bachelor of Arts in political science from McGill University and a Master of Journalism from Carleton University in Ottawa.

Jose Minaya

CEO | Nuveen

Jose Minaya is Chief Executive Officer of Nuveen, a leading global asset management firm with more than $1 trillion under management.

Jose is responsible for Nuveen's vision, strategy and day-to-day operations. He and his leadership team set and execute key growth initiatives and oversee the firm's investment teams, product strategy and management and client businesses. He chairs the Nuveen Executive Committee and is also a member of the TIAA Executive Committee. Jose is also the executive sponsor of the Inclusion and Diversity initiative for TIAA, working to build and promote a diverse and inclusive environment across the company. He joined TIAA as a fixed income portfolio manager in 2004 and has more than 29 years of investment experience at firms including AIG, Merrill Lynch and JP Morgan.

Jose was previously President and Chief Investment Officer, responsible for overseeing all global operating and investment activities across equities, fixed income, real estate, private markets, natural resources, other alternatives and responsible investments.

He serves on the boards of multiple companies and charitable organizations, including Moody's, the Robert Toigo Foundation, the National Forest Foundation, the Investment Committee of the Board of Regents of the Smithsonian Institution and the Investment Company Institute. Jose is also on the board of Trustees of Manhattan College, where he received a bachelor's in finance, and is the Chairman of the Amos Tuck School of Business MBA Council at Dartmouth, where he received an MBA.

GEF 2023 Speakers

Dambisa Moyo

Global Economist & Board Member | Chevron, Conde Nast, and the Oxford University Endowment

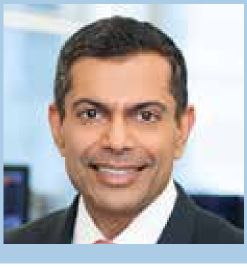
Dr. Dambisa Moyo is a pre-eminent thinker, who influences key decision-makers in strategic investment and public policy. She is respected for her unique perspectives, her balance of contrarian thinking with measured judgment, and her ability to turn economic insight into investible ideas.

Dambisa Moyo is a co-principal of Versaca Investments – a family office, focused on growth investing globally. She serves on a number of global corporate boards including: Chevron, Conde Nast, as well as the Oxford University Endowment investment committee. Her areas of interest are in capital allocation, risk and ESG matters. She holds a Doctorate in Economics from Oxford, a Masters from Harvard, and is recognized for fresh and innovative ideas as the Author of four New York Times Bestselling Books. She previously worked at the World Bank and Goldman Sachs for nearly a decade. She is the author of four New York Times bestselling books, most recently, "Edge of Chaos: Why Democracy Is Failing to Deliver Economic Growth – and How to Fix It".

- How Boards Work And How They Can Work Better in a Chaotic World (2021)
- Edge of Chaos: Why Democracy is Failing to Deliver Economic Growth and How to Fix It (2018)
- Winner Take All: China's race for Resources and What it Means for the World (2012)
- How the West Was Lost: Fifty Years of Economic Folly and the Stark Choices Ahead (2011)
- Dead Aid: Why Aid is Not Working and How There is a Better Way for Africa (2009)

Dambisa is an honorary fellow of the Foreign Policy Association, member of the Bretton Woods Committee and member of Trilateral Commission.

Dambisa was named to the list of Time Magazine's 100 Most Influential People in the World; has published in the Financial Times, WSJ, Barrons, Harvard Business Review and has travelled to over 65 countries. In her spare time, she runs marathons and practices Pilates.



Jamil Nazarali

CEO | EDX Markets

Jamil Nazarali is CEO of EDX Markets, a new market launched by a consortium of industry leaders to enable safer, faster and more efficient trading of digital assets through trusted intermediaries. Prior to assuming this role, Jamil served in a number of roles at Citadel Securities, including as Global Head of Business Development and Head of Citadel ExecutionServices. Previously, Jamil was Global Head of Electronic Trading at Knight Capital Group, and earlier worked as a management consultant at both Ernst & Young and Bain & Company. Jamil has served on a number of industry and board positoons including as Chairman of the Board of Members Exchange (MEMX), a member of the SEC's Equity Market Structure Advisory Committee and a member of BATS Holdings Board. Jamil received an MBA with high honors from the University of Chicago and a bachelor's degree from University of Western Ontario.

Rich Nuzum, CFA

Executive Director & Chief Investment Strategist | Mercer

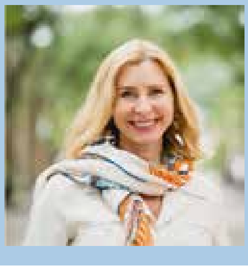
Rich is Executive Director, Investments and Global Chief Investment Strategist for Mercer. He works with some of Mercer's largest, most sophisticated clients, and is accountable for Mercer's "innovation agenda", including the creation and development of thought leadership and related products and services across the firm.

Over the last 30+ years, Rich has provided investment advice to clients in more than 20 countries, including many of the world's largest institutional investors. Rich has also led social security and other long term savings reform projects in five countries and one US state. And, Rich has led Mercer's work in several projects with the World Economic Forum, including work related to Transformational Investment, and to the Longevity Economy.

Rich was President of Mercer's Investments & Retirement business and a member of Mercer's Executive Leadership team from 2017 to 2022. Prior to that, he led Mercer's investment management business globally and served in various other leadership capacities while based in Tokyo, Singapore and New York, including serving as global Chief Investment Officer for Mercer's investment management business.

Rich holds an MBA (with high honors) in analytic finance and accounting from the University of Chicago and a bachelor's degree (with honors) in mathematical sciences and mathematical economic analysis from Rice University in Houston, Texas. Rich also did graduate work in international economics at Tokyo University. He is a CFA® charterholder and a member of the CFA Institute.

Rich has repeatedly been named to CIO Magazine's annual list of the world's most influential investment consultants and received CIO Magazine's 2017 Industry Innovation Award as Consultant of the Year.



Rebecca Patterson

Global Macro Investor & Board Chair | Council for Economic Education

Rebecca Patterson is a globally recognized investor and macro-economic researcher with more than 25 years' experience studying how politics and policy intersect with economic trends to drive financial markets. Most recently, Rebecca was Chief Investment Strategist for Bridgewater Associates. Previously, Rebecca was Chief Investment Officer of Bessemer Trust, overseeing $85 billion in client assets. Before joining Bessemer in 2012, Rebecca spent more than 15 years at JPMorgan in different senior research and trading roles in Europe, Singapore and the U.S. Rebecca's transition to finance came after several years working as a journalist, covering financial markets, policy and politics in the U.S. and Europe.

Rebecca is currently a member of the Council on Foreign Relations, the Trilateral Commission and the Economic Club of New York. She has served on the New York Federal Reserve's Investor Advisory and Foreign Exchange committees and currently serves on the University of Florida's Investment Corporation Advisory Board. She chairs the Council for Economic Education and is a member of the board of the Bretton Woods Committee. Rebecca holds an M.B.A. from New York University, an M.A. in International Relations from the Johns Hopkins University School of Advanced International Studies, and a B.S. in Journalism from the University of Florida. She was included in American Banker's list of Most Powerful Women in Finance for six consecutive years and was named to Forbes' 50 over 50 in 2022.

GEF 2023 Speakers

George Pyne

Founder & CEO | Bruin Capital

George Pyne has crafted a three-decade–long career architecting transformative businesses and ventures that produce billions in revenue and shareholder value. His latest, Bruin Capital, founded in 2015, is the first and only investment platform specializing in sports. Its mission is to build best-in-class global sports platforms by leveraging Bruin's deep operational expertise and incomparable network.

Bruin's portfolio operates in 50 countries on five continents and is relied upon by virtually every major sports league, governing body, and rights holder. Through Bruin and his role as Non-Executive Chair of Courtside Ventures' initial fund, George has advised or led more than 50 investments in sports, media, technology, health, and fitness.

Before Bruin, George was President and Board Member of IMG Sports & Entertainment for Ted Forstmann. He transformed the talent management agency into the industry's leading global sports and entertainment company with best-in-class digital media, ticketing, in-stadium service, and non-athletic rights businesses. Ultimately, the work more than tripled IMG's value to $2.4B.

Before IMG, George was the Chief Operating Officer of NASCAR and only the second non-family member on its Board. He reinvented the regional series into a top-tier mainstream sport, garnering billions in revenue plus millions of new fans throughout North America.

George began his career working for his family's real estate business before relocating to Atlanta, GA, where he led a full analysis of the city's school budget and operations for the city. The work resulted in sweeping fiscal and operational reforms. He then joined Portman Companies, the eponymous commercial real estate and architectural firm founded by world-renowned architect John Portman. He organized a multi-billion debt restructuring across the company's 19 businesses and launched a sports marketing and events business there.

A Brown University graduate, he was Captain, All-Ivy League, and All-New England offensive lineman for the then-Bruins. In 2014, he received the NCAA Silver Anniversary Award for 25 years of post-graduate industry leadership. He is in the National Football Foundation Leadership Hall of Fame, the Sports Business Journal Hall of Fame, and has received the Ivy League Football Association Lifetime Achievement Award and The March of Dimes corporate leadership award. George is currently a Trustee of Choate Rosemary Hall and on the Board of the National Football Foundation.

He and his wife Helene have four children and reside in New Canaan, Connecticut.

Joseph Quinlan

Head of Market Strategy | Bank of America

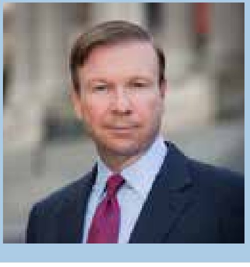
Joseph Quinlan is Managing Director and Head of Market Strategy for the Chief Investment Office (CIO) within Bank of America Corporation supporting Bank of America Private Bank and Merrill. In this role, Joe leads a team responsible for global market and thematic analysis in support of the asset allocation and portfolio construction across the wealth management businesses. Joe provides economic and market insights, guiding overall investment strategy, both domestically and globally.

Mr. Quinlan began his career with Merrill and also served as a senior global economist/strategist for Morgan Stanley.

He has earned his B.A. in Political Science/International Affairs from Niagara University and M.A. in International Political Economics and Development from Fordham University. He is frequently cited in such publications as Foreign Affairs, Barron's, The Wall Street Journal, The New York Times and the Financial Times. He regularly appears on CNBC, as well as Bloomberg television, PBS and other media venues. He has co-authored the book Gender Lens Investing: Uncovering Opportunities for Growth, Returns, and Impact.

Mr. Quinlan lectures on finance and global economics at Fordham University and has lectured at various universities around the world, including Wuhan University in China. In 1998, he was nominated as an Eisenhower Fellow. Presently, he is a Senior Fellow at the Paul H. Nitze School of Advanced International Studies of Johns Hopkins University, Washington D.C. In 2006, the American Chamber of Commerce to the European Union awarded Mr. Quinlan the 2006 Transatlantic Business Award for his research on U.S.-Europe economic ties. In 2007, he was a recipient of the European-American Business Council Leadership award for his research on the transatlantic partnership and global economy.

Mr. Quinlan is an author, co-author, or contributor to over twenty books and has published more than 125 articles on economics, trade and finance.



Gene Reilly

Founder and Chief Investment Officer | Greenwich Quantitative Research LP

Gene Reilly is the Founder and Chief Investment Officer of Greenwich Quantitative Research LP. Gene has thirty years of experience trading, investing, and managing risk across multiple products and geographies, with nineteen years' experience in Asian financial markets.

As a career highlight, Gene was Partner and Head of Pan-Asian Equity Trading at Goldman Sachs and in that capacity developed a very successful Quantitative Trading business for GS. Additionaly, Gene was the Global Head of Quantitative Trading at Bank of America Merrill Lynch. He has always been at the forefront of the industry in quantitative investing, automated trading and algorithmic trading. Gene started his career trading at the Susquehanna Investment Group straight out of the Wharton School. Gene also ran a very profitable trading business in Japan leveraging automated trading for Deutsche Bank. Gene also founded and ran a standalone high frequency market making firm, Arxis Capital LLC.

Gene holds a Bachelor of Arts in History and a Bachelor of Science in Finance from the College and Wharton School of the University of Pennsylvania respectively. Gene is also a CFA charter holder since 1994.

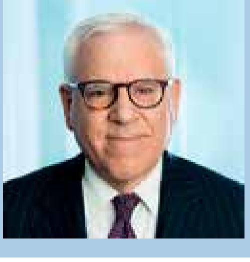
Gregory Robbins

Vice Chair | Golub Capital

Gregory Robbins is Vice Chair of Golub Capital, a market-leading, award-winning direct lender and experienced credit asset manager. As of April 1, 2023, Golub Capital had over $60 billion of capital under management, a gross measure of invested capital including leverage. Golub Capital partners with institutional investors and family offices, offering tailored solutions for investors' credit asset strategies. The Firm specializes in delivering reliable, creative and compelling financing solutions to companies backed by private equity sponsors. Golub Capital has been a top 3 U.S. Middle Market Bookrunner each year from 2008 through Q1 2023 for senior secured loans of up to $500 million for leveraged buyouts. Golub Capital has been consistently recognized with industry awards, including Lender of the Year, Americas (Private Debt Investor, 2015, 2016, 2018, 2021) and Senior Lender of the Year, Americas (Private Debt Investor, 2015, 2016, 2017, 2019, 2020).

Mr. Robbins joined Golub Capital in 2004 and is Vice Chair of the Firm. He is also an officer of Golub Capital BDC, Inc. (NASDAQ: GBDC) and a member of the board of the Loan Syndications and Trading Association. Mr. Robbins was previously a Senior Managing Director and Co-Head of the Investor Partners Group. Prior to joining Golub Capital, Mr. Robbins was a Vice President in the Merchant Banking Group at Indosuez Capital. Prior to this position, Mr. Robbins worked as an Associate at Saw Mill Capital, a middle market private equity firm.

Mr. Robbins earned a BS degree in Economics, with a Finance concentration, from the Wharton School of the University of Pennsylvania.



David Rubenstein

Co-Founder & Co-Chairman | The Carlyle Group

David M. Rubenstein is Co-Founder and Co-Chairman of The Carlyle Group, one of the world's largest and most successful private investment firms. Established in 1987, Carlyle now manages $385 billion from 29 offices around the world.

Mr. Rubenstein is Chairman of the Boards of the John F. Kennedy Center for the Performing Arts, the Council on Foreign Relations, the National Gallery of Art, the Economic Club of Washington, and the University of Chicago; a Trustee of Memorial Sloan-Kettering Cancer Center, Johns Hopkins Medicine, the Institute for Advanced Study, the National Constitution Center, the Brookings Institution, and the World Economic Forum; and a Director of the Lincoln Center for the Performing Arts and the American Academy of Arts and Sciences, among other board seats.

Mr. Rubenstein is a leader in the area of Patriotic Philanthropy, having made transformative gifts for the restoration or repair of the Washington Monument, Lincoln Memorial, Jefferson Memorial, Monticello, Montpelier, Mount Vernon, Arlington House, Iwo Jima Memorial, the Kennedy Center, the Smithsonian, the National Archives, the National Zoo, the Library of Congress, and the National Museum of African American History and Culture.

Mr. Rubenstein is an original signer of The Giving Pledge; the host of The David Rubenstein Show, Bloomberg Wealth with David Rubenstein, and Iconic America: Our Symbols and Stories with David Rubenstein; and the author of The American Story, How to Lead, The American Experiment, and How to Invest.

GEF 2023 Speakers

Damian Sassower

Chief EM Fixed Income Strategist | Bloomberg Intelligence

Damian Sassower is the senior emerging markets fixed income strategist for Bloomberg Intelligence, a unique research platform that provides context on industries, companies, and government policy, available on the Bloomberg Professional service at BI <GO>. Mr. Sassower specializes in sovereign and corporate credit, both hard and local currency.

Prior to joining Bloomberg, Mr. Sassower was a managing director at Altree Financial, where he oversaw institutional emerging market credit and equity funds as a member of the investment committee. Mr. Sassower has nearly two decades of investment experience having held various buy- and sell-side positions at Citigroup, Lehman Brothers and Goldman Sachs.

Mr. Sassower earned his MBA in finance from The Leonard N. Stern School of Business at New York University and BA in economics from Vanderbilt University.

Ludwig Pierre Schulze

Managing Partner | Alumni Ventures

Ludwig has been on all sides of venture — as an entrepreneur, corporate buyer of start-ups, and venture capitalist. These days, he is on the venture side of the table with Alumni Ventures, a $1.2B cross-sector and stage group investing in >300 companies per year. At AV, Ludwig manages funds seeking to build wealth for individuals in the Columbia University (116 Street Fund) and Brown University (Waterman Fund) communities as well as institutional investors interested in custom venture portfolios.

Before Alumni Ventures, he experienced the daily realities of entrepreneurship as Founder and CEO of a mobile payments venture that served over 12 million people. Earlier, at a Fortune 100 telecommunications manufacturer (Nokia), he held general manager and business development roles that included investing in and acquiring venture-backed businesses. His first experience in venture capital was focused on enterprise and mobile software before and after the dotcom crash. Ludwig began his career as a strategy consultant with the Boston Consulting Group. He has a BA from Brown University and an MBA from Columbia. He lives in NYC with his wife and 2 teenagers.

Randy Schwimmer

Co-Head of Senior Lending | Churchill Asset Management

Randy is co-head of senior lending and oversees senior lending origination and capital markets for Churchill Asset Management, an investment specialist of Nuveen.

Randy has broad experience in middle market finance and is widely credited with developing loan syndications for middle market companies. Prior to joining the firm, Randy served as a senior managing director and head of capital markets and indirect origination at Churchill Financial. In those positions, he took responsibility for all loan capital markets activities and for managing the firm's indirect origination platform. Before that, he worked as managing director and head of leveraged finance syndication for BNP Paribas. He spent 15 years at JP Morgan Chase in corporate banking and loan syndications, where he originated, structured and syndicated leveraged loans.

Randy graduated with a B.A., cum laude, from Trinity College and an M.A. from the University of Chicago.

Deepika Sharma

Global Head of Manager Selection, MASS | BlackRock

Deepika (Dee) Sharma is the Global Head of Manager Selection for the Multi-Manager Platform in BlackRock's Multi-Asset Strategies & Solutions (MASS), which includes the global Outsourced CIO (OCIO) and Wealth Solutions business, with allocations across public and private market strategies. The Multi-Asset Strategies & Solutions (MASS) team is the investment group at the heart of BlackRock's portfolio construction, asset allocation, and active management ecosystem. MASS draws on the full toolkit of BlackRock's investment capabilities to deliver precise investment outcomes and cutting-edge alpha insights.

Deepika has spent over 15 years in portfolio management and research roles focusing on multi-asset investing, with publications in the Journal of Investing and Beta Investment Strategies. Previously, Dee led product research focused on factors and fixed income within US ETF & Index Investments (EII) business and was responsible for executing on product opportunities using proprietary research.

Prior to joining BlackRock, she was a Portfolio Manager and Director of Investment Research at Astor Investment Management, a $2bn asset management firm, where she built a multi-alternative strategy awarded with Refinitiv Lipper awards for outstanding performance. She previously worked within the Fixed Income Proprietary Trading group at Nomura and began her career as an analyst on the structured credit desk at Lehman Brothers.

Deepika most recently served as Chair of Board of Directors at CFA Society New York, the largest of the 142+ societies that comprise CFA Institute worldwide with over 10,000 members. She is also a member of the Milken Institute, Bretton Woods Committee and the Economic Club of New York. Deepika holds a Masters in International Finance at Columbia University.

Anna Snider

Head of Due Diligence, CIO Office | Bank of America

Anna is a Managing Director and Head of Due Diligence for the Chief Investment Office within Global Wealth & Investment Management (GWIM), a division of Bank of America Corporation. In this role, she is responsible for manager research across all asset classes for the wealth management businesses. She also defines and executes investment strategies focusing on impact strategy research, thought leadership and investment implementation.

Prior to this role, Anna was part of the alternative investments group where she advised clients on hedge fund and private assets portfolio construction and became head of research for externally managed alternative investment fund of funds. She was also a senior analyst in the risk management division at U.S. Trust. Anna offers many years of investment and risk analysis experience, having held positions at the Federal Reserve Bank of New York, JP Morgan and UBS focusing on market, credit and operational risk management. She graduated from Connecticut College. She holds the Chartered Alternative Investment Analyst (CAIA) designation. Anna serves as chair of the board for High Water Women, a foundation based in NYC.

Michael Spence

Economist & Nobel Laureate | Stanford University

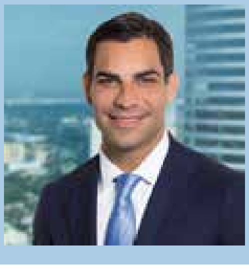
Michael Spence is the Philip H. Knight Professor Emeritus of Management in the Graduate School of Business at Stanford University, a Senior Fellow of the Hoover Institution at Stanford, a Distinguished Visiting Fellow of the Council on Foreign Relations, an Adjunct Professor at Bocconi University in Milan, and an Honorary Fellow of Magdalen College, Oxford University.

In 2001, he received the Nobel Prize in Economic Sciences for his work in the field of information economics. Spence was awarded the John Kenneth Galbraith Prize for excellence in teaching and the John Bates Clark Medal for a "significant contribution to economic thought and knowledge."

From 1984 to 1990, he served as the dean of the Faculty of Arts and Sciences at Harvard, overseeing Harvard College, the Graduate School of Arts and Sciences, and the Division of Continuing Education.

Spence is currently a Senior Advisor to Jasper Ridge Partners and a Senior Advisor to General Atlantic Partners.

GEF 2023 Speakers



Francis Suarez

Mayor | City of Miami

Francis X. Suarez is the 33rd Mayor of the City of Miami. As the first Miami-born mayor, he is committed to working diligently to serve the residents of the community where he was born and raised. Prior to being elected with 86 percent support from Miami residents, Mayor Suarez served as Miami Commissioner for District 4 during eight years.

Mayor Suarez is dedicated to elevating the quality of life of the residents he serves by focusing on transportation and connectivity, resiliency, and job creation by nurturing the growth of technology and innovation. He is also committed to expanding affordable housing, tackling the poverty pandemic and, as a corollary, reducing crime. The oldest of four siblings, Mayor Suarez was born into a family where, as he describes, "being socially conscious was a kind of requirement." As the son of former City of Miami Mayor, Xavier Suarez, he was also exposed to public service since he was a child, growing up around his father's office at City Hall, the same one he works out of today. Mayor Suarez earned a bachelor's degree in finance from Florida International University, graduating in the top ten percent of his class. He went on to receive his law degree from the University of Florida Frederic G. Levin College of Law, where he graduated cum laude. He is currently an attorney with the law firm Greenspoon Marder, specializing in corporate and real-estate transactions.

Mayor Suarez is married to Gloria Fonts Suarez. They have a son, Andrew Xavier, and a daughter, Gloriana Pilar. They consider themselves honored and blessed to be raising their family in the City of Miami.

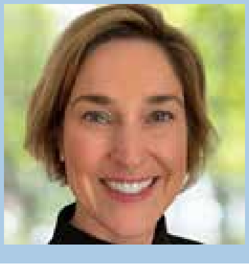
Dave Thornton

CEO, Chief Investment Officer | Vested

Dave is Vested's CEO and Chief Investment Officer. He is the architect and portfolio manager of Vested's funds.

For the last 11 years, Dave has been a serial entrepreneur. His most notable accomplishments include the founding and successful sale of PatientFinder, and the creation — with a team that has been re-assembled at Vested — of a real-time illiquid asset pricing model that is currently algo-trading a $300M book at a name-brand bank.

Dave also spent time building the systems at a hedge fund within Citi Alternative Investments (post-Dodd Frank: Napier Park), and worked as a Program Manager at Microsoft. Dave received a BAS in Computer Science from the University of Pennsylvania's School of Engineering and Applied Science and a BS in Economics with a concentration in Decision Processes from the University of Pennsylvania's Wharton School. Dave earned a JD from Georgetown University.



Christine Todd

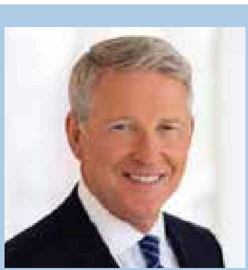
CIO | Arch Capital Group

Christine Todd is Executive Vice President, Chief Investment Officer of Arch Capital Group Ltd. and President of Arch Investment Management Ltd. She joined Arch in June 2021 and has responsibility for setting the firm's investment strategy and managing the day-to-day operations of the investment portfolio. Prior to joining Arch, Ms. Todd was Head of Fixed Income, U.S., for Amundi US from February 2019 to May 2021. She has also held executive roles at Neighborly Investments; Standish Mellon Asset Management Company LLC; and Gannett, Welsh & Kotler. She is a Chartered Financial Analyst and holds a B.A. from Georgetown University and an MBA from Boston University.

Jan van Eck

CEO | VanEck

Jan is the CEO of VanEck, a global investment manager. Headquartered in New York City since 1955, the firm has a long history of empowering Investors with forward-looking, intelligently designed mutual fund and ETF solutions. Jan joined the Firm in 1991 and its Executive Management Team in 1998, and leads the firm today. He also founded the Firm's ETF business in 2006.
Furthering the firm's mission to anticipate asset classes and trends, VanEck offers a variety of strategic beta, tactical allocation, emerging markets and commodity-related investment strategies in mutual fund, ETF and institutional formats. As one of the world's largest ETF sponsors, the firm offers ETFs globally across a variety of equity and fixed income asset classes.
Jan holds a JD from Stanford University and graduated Phi Beta Kappa from Williams College with a major in Economics. He is a Director of the National Committee on United States-China Relations and is on the USC Marshall School of Business Board of Councilors. He routinely appears on CNBC and Bloomberg Television, and was a 2013 Finalist for Institutional Investor's Fund Leader of the Year. More recently, Jan was a 2020 Finalist for ETF.com's Lifetime Achievement Award, and the Firm was named 2020 ETF Provider of the Year by Fund Intelligence.



David Westin

Anchor | Bloomberg

David Westin is the anchor of "Bloomberg Wall Street Week," "Bloomberg: Balance of Power" and "Bloomberg Big Decisions."

Westin was president of ABC News from 1997 through 2010. He oversaw the network's global coverage including the 2008 economic crisis, the wars in Afghanistan and Iraq, as well as the 9/11 attacks and their aftermath.

Before taking the helm at ABC News, Westin was President of the ABC Television Network and General Counsel of the parent company, Capital Cities/ABC. He was a partner and associate at Wilmer, Cutler & Pickering in Washington and, immediately after law school, clerked for J. Edward Lumbard on the Second Circuit and for Lewis F. Powell on the Supreme Court. He serves on the boards of Riverdale Country School and Yonkers Partners in Education.

During Westin's tenure at ABC News, the organization earned 11 George Foster Peabody Awards, 13 Alfred I. DuPont Awards, four George Polk Awards, more than 40 News & Documentary Emmys and more than 40 Edward R. Murrow Awards. He is the author of "Exit Interview," which was published in 2012 and tells the story of what went on behind the scenes at ABC News in covering the biggest global news events.

Westin graduated from the University of Michigan with a Philosophy degree with honors and distinction. He went on to earn a JD degree summa cum laude from the University of Michigan Law School.

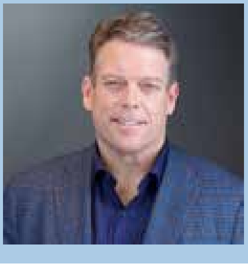
GEF 2023 Speakers

Dr. Yanan Wu

Chairman & CEO | Surfin-Meta

Yanan Wu is the Chairman and CEO of Meta Fund Investment Management Pte Ltd. (Singapore) serving institutions and family offices in global multi-asset allocation through quantitative investment strategies. He has over 26 years' global investment experience and a Ph.D in statistical physics from University Western Ontario.

Previously he served as research staff at Los Alamos National Laboratory (Polymer Physics), New Mexico, USA. As the Head of Quantitative Investment and senior portfolio manager for Eastspring Investment (CITIC-Prudential Fund Management Co.) from 2009-2014, he managed about 4 billion USD multi-strategy hedge funds. As the VP and senior portfolio manager of TD Asset Management Inc., Toronto, Canada from 1996 till 2009, he managed about 30 billion (CAD) assets including portable alpha, liability-driven products as well as global asset allocation and duration extension overlay strategies for large pension, insurance, endowments, family trusts and various institutional clients.



Ted Yarbrough

CIO | Yieldstreet

Ted Yarbrough leads investment strategy across Yieldstreet's wide range of asset classes as Chief Investment Officer. Under his leadership, the investment team is tasked with driving ambitious asset growth, expanding Yieldstreet's origination network, and developing innovative private market products of the future.

Ted joins Yieldstreet following more than 28 years at Citigroup and its predecessor companies, where he held various senior roles across the firm's banking, markets, and lending platforms. Most notably, Ted served as Chief Investment Officer for Citi's Spread Products business as well as Global Head of Structured Finance, and he has extensive experience across multiple asset classes.

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ARES

Ares Management Corporation (NYSE:ARES) is a leading global alternative investment manager offering clients complementary primary and secondary investment solutions across the credit, private equity, real estate and infrastructure asset classes. We seek to provide flexible capital to support businesses and create value for our stakeholders and within our communities. By collaborating across our investment groups, we aim to generate consistent and attractive investment returns throughout market cycles. As of June 30, 2023, Ares Management Corporation's global platform had approximately $378 billion of assets under management, with over 2,600 employees operating across North America, Europe, Asia Pacific and the Middle East.

For more information, please visit www.aresmgmt.com.

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CHURCHILL

Churchill, an investment-specialist affiliate of Nuveen (the $1.1 trillion asset manager of TIAA), is an award-winning middle market private capital manager offering clients customized solutions across the capital structure. With $47 billion of committed capital, the firm provides senior lending, junior capital, equity co-investments and secondary solutions to private equity sponsors and their portfolio companies. Churchill also invests over $1 billion annually as an LP in leading private equity firms, a key differentiator that drives proprietary deal flow. Churchill has a 17-year track record of disciplined investing thought multiple economic cycles and is driven by 160 professionals in New York, Charlotte, Chicago, Dallas and Los Angeles.

More information can be found at www.churchillam.com.

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NUVEEN

Nuveen, the investment manager of TIAA, offers a comprehensive range of outcome-focused investment solutions designed to secure the long-term financial goals of institutional and individual investors. Nuveen has $1.1 trillion in assets under management as of 30 Jun 2023 and operations in 27 countries. Its investment specialists offer deep expertise across a comprehensive range of traditional and alternative investments through a wide array of vehicles and customized strategies.

For more information, please visit www.nuveen.com.

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ABU DHABI GLOBAL MARKET (ADGM)

Abu Dhabi Global Market (ADGM), an international financial centre (IFC) located in the capital city of the United Arab Emirates, opened for business on 21 October 2015. Established by a UAE Federal Decree as a broad-based financial centre, ADGM augments Abu Dhabi's position as a global trade and business hub serving as a strategic link between the growing economies of the Middle East, Africa and South Asia and the rest of the world.

ADGM's strategy is anchored by Abu Dhabi's key strengths spanning over private banking, wealth management, asset management, derivatives and commodities trading, financial innovation, sustainability and more. Comprising four independent authorities: ADGM Authority, ADGM Courts, the Financial Services Regulatory Authority and the Registration Authority, ADGM as an IFC governs the entire 1,438 hectares of Al Maryah Island and Al Reem Island, which is a designated financial free zone.

It enables registered financial and non-financial institutions, companies and entities to operate, innovate and succeed within an international regulatory framework based on common law. Since its inception, ADGM has been awarded the "Financial Centre of the Year (MENA)" for four consecutive years for its initiatives and contributions to the financial and capital markets industry in the region.*

For more details on ADGM, please visit www.adgm.com

PLATINUM SPONSORS

GOLUB CAPITAL

Golub Capital is a market-leading, award-winning direct lender and experienced credit asset manager. We specialize in delivering reliable, creative and compelling financing solutions to companies backed by private equity sponsors. Our sponsor finance expertise also forms the foundation of our Broadly Syndicated Loan and Credit Opportunities investment programs. We nurture long-term, win-win partnerships that inspire repeat business from private equity sponsors and investors.

As of July 1, 2023, Golub Capital had over 825 employees and over $60 billion of capital under management, a gross measure of invested capital including leverage. The firm has lending offices in Chicago, New York, San Francisco and London.

For more information, please visit golubcapital.com.

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SURFIN

Surfin is a global leading financial service firm headquartered in Singapore focusing on wealth management technology and global asset allocation for growing middle class families in emerging markets. By using AI and big data analytics, Surfin strives to provide individualized transparent trustworthy innovative financial services through advanced algorithms and models. Surfin has served over 20 million users in three continents since 2017 through its partnership network that includes fund managers, asset managers and institutional investors.

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Corporate Partner Profiles

XPO

XPO is one of the largest providers of asset-based less-than-truckload (LTL) freight transportation in North America, with proprietary technology that moves goods efficiently through its network. Together with its business in Europe, XPO serves approximately 49,000 customers with 562 locations and 37,000 employees. The company is headquartered in Greenwich, Connecticut.

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ALIXPARTNERS

AlixPartners is a results-driven global consulting firm that specializes in helping businesses successfully address their most complex and critical challenges. Our clients include companies, corporate boards, law firms, investment banks, private equity firms, and others. Founded in 1981, AlixPartners is headquartered in New York, and has offices in more than 20 cities around the world.

For more information, visit www.alixpartners.com.

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ALUMNI VENTURES

Alumni Ventures is America's largest venture firm for individual investors. Founded in 2014, we offer professional-grade venture capital portfolios to individual investors. • #1 most active venture firm in the US and #3 globally (PitchBook 2022) • Most Innovative Companies, FastCompany 2022 • Best Alternative Investment Platform, Benzinga 2021 • Portfolio of 1,100+ venture backed companies • 150+ full-time employees, including 50 full-time experienced venture investors Investors receive high-quality venture portfolios of 20-30 companies for as little as $10,000. Founders receive exclusive access through our CEO Services to our large network of 650,000+ community members, and 6,000+ Expert Community.

Learn more at av.vc.

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BANK OF AMERICA PRIVATE BANK

Bank of America Private Bank offers innovative and customized financial solutions to help meet unique lifestyle, family, business and philanthropic goals for wealthy individuals, families and institutions with complex wealth management needs. A coordinated team backed by more than 200 years of experience and the resources of one of the world's largest financial institutions works with each client to understand and address their needs. We apply deep wealth management expertise and financial acumen to deliver across a comprehensive range of capabilities, including wealth structuring, investment management, customized credit and banking, legacy and philanthropy, and family office services.

To learn more about Bank of America Private Bank, please visit bankofamerica.com/PrivateBank.

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Connecticut Insurance and Financial Services (CT IFS), formed in 2003, is a statewide initiative of the MetroHartford Alliance comprised of 32 member companies in Connecticut's insurance and financial services sector. For the last seventeen years and with a collective focus on the future, the Connecticut Insurance and Financial Services (CT IFS) mission is to strengthen and advance the insurance and financial services industry in Connecticut.

GOLD SPONSORS

EDX MARKETS

EDX is a new digital asset marketplace designed to meet the needs of both crypto native firms and the world's largest financial institutions. Backed by Citadel, Fidelity, Schwab, Virtu, Sequoia, Paradigm, and others, EDX enables safer, faster, and more efficient trading and settlement of digital assets, leveraging best practices from traditional financial markets on a purpose-built crypto platform.

GOLD SPONSORS

HILDENE CAPITAL MANAGEMENT

Hildene Capital Management is an alternative asset manager with $14 billion in assets under management specializing in opportunistic and complex credit investing through structured and private credit strategies. Hildene invests through hedge fund, drawdown, SMA, insurance and securitization vehicles, with a strong focus on maximizing returns through event-driven strategies. The firm's investment process extends above and beyond traditional market valuation and utilizes rigorous analysis and research to examine the value of a particular option, structure and asset. The firm was founded in 2008 and is based in Stamford, CT.

Learn more at https://www.hildenecap.com

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Corporate Partner Profiles

ICAPITAL

Founded in 2013, iCapital is the leading global fintech company powering the world's alternative investment marketplace. iCapital has transformed how the wealth management, banking, and asset management industries facilitate access to private markets investments for their high-net-worth clients by providing intuitive, end-to-end technology and service solutions, education tools and resources, and robust diligence, compliance, and portfolio analytics capabilities. iCapital's solutions enable organizations to streamline and scale their operational infrastructure for alternative investments and to provide access to direct investments and feeder funds at lower minimums through simplified digital workflows.

iCapital-managed platforms offer wealth advisors and their high-net-worth clients access to an extensive menu of private investments, including equity, credit, real estate, infrastructure, hedge funds, structured investments, annuities, and risk-managed solutions. iCapital has been recognized on the Forbes Fintech 50 list each year from 2018 to 2023, the Forbes America's Best Startup Employers in 2021, 2022, and 2023, and MMI/Barron's Industry Awards as Solutions Provider of the Year in 2020, 2021, and 2022.

As of June 30, 2023, iCapital services more than $162 billion in global client assets, of which nearly $29 billion are from international investors (non-U.S. domestic) across more than 1,300 funds. Employing more than 1,100 people globally, iCapital is headquartered in New York City and has offices worldwide, including in Zurich, London, Lisbon, Hong Kong, Singapore, and Toronto.

For more information, visit https://icapital.com | Twitter: @icapitalnetwork | LinkedIn: https://www.linkedin.com/company/icapital-network-inc

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MERCER

Mercer believes in building brighter futures by redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and well-being. Mercer's approximately 25,000 employees are based in 43 countries and the firm operates in 130 countries. Mercer is a business of Marsh McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people, with more than 85,000 colleagues and annual revenue of over $20 billion. Through its market-leading businesses including Marsh, Guy Carpenter and Oliver Wyman, Marsh McLennan helps clients navigate an increasingly dynamic and complex environment.

For more information, visit mercer.com. Follow Mercer on LinkedIn and Twitter.

GOLD SPONSORS

NOAH

Noah Holdings ("Noah") is a pioneer in the client-centric and synergistic wealth management and asset management business model in China, and the first Chinese wealth management company listed in the U.S. and Hong Kong. Being the largest independent high-net-worth ("HNW") wealth management service provider in China, Noah manages wealth for HNW and socially responsible families and institutions by connecting leading asset managers around the world, and devotes ourselves to creating legacy for generations to come. Noah's 100% owned subsidiary, Gopher Asset Management ("Gopher"), is one of the largest market-oriented private equity Fund of Funds in China. Gopher develops and provides comprehensive and tailored in-house products to supplement third party offerings.

Noah's wealth management business primarily distributes private equity, public securities and insurance products denominated in RMB and other currencies. Noah's network covers 63 cities in mainland China, as well as Hong Kong (China), Taiwan (China), New York, Silicon Valley and Singapore.

GOLD SPONSORS

YIELDSTREET

Yieldstreet empowers investors to grow their wealth outside the stock market by curating private market alternatives from top investment managers. With more than 440,000 members, Yieldstreet is the leading private market investing platform, helping investors diversify their portfolios with alternative assets spanning real estate, private credit, legal finance, art, and more. The platform is differentiated by its ten asset classes, institutional due diligence standards, strong track record, and seamless investor experience.

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PURE INSURANCE

Privilege Underwriters Reciprocal Exchange (PURE) is dedicated to creating an exceptional experience for responsible high net worth families, providing customizable coverage for high-value homes, automobiles, jewelry, art, personal liability, watercraft, flood, fraud and cyber fraud. PURE's low cost of capital, careful member selection and proactive risk management contribute to fair pricing and a Financial Strength Rating of "A (Excellent)" from A.M. Best Company, Inc. PURE has sustained at least 15% annual growth in each year since its inception and now serves more than 100,000 members across the United States.

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Established in 1784, BNY Mellon is America's oldest bank and the first company listed on the New York Stock Exchange (NYSE: BK). Today, BNY Mellon powers capital markets around the world through comprehensive solutions that help clients manage and service their financial assets throughout the investment life cycle. BNY Mellon had $46.9 trillion in assets under custody and/or administration and $1.9 trillion in assets under management as of June 30, 2023. BNY Mellon has been named among Fortune's World's Most Admired Companies and Fast Company's Best Workplaces for Innovators. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation. Additional information is available on www.bnymellon.com. Follow us on LinkedIn or visit our Newsroom for the latest company news.

COCKTAIL SPONSORS

THE FIELD POINT

The FIELD POINT is the marquee property set upon the notable Belle Haven peninsula amongst distinct manor homes within the exquisite coastal community of Greenwich Connecticut. This condo hotel is the first of its kind in its area and raises the bar for iconic architecture combined with luxurious convenience effecting the ultimate in world-class experiences.

AMENITY SPONSORS

Corporate Partner Profiles

ERIVER

ERIVER is a consulting firm focused on business development, events and training programs. Our mission is to help clients from China and APAC find business opportunities and invest globally, and to help global firms to access China and other emerging markets. Ms. Ying Sun, the founder and CEO, has more than 20 years experience in the financial industry and information technology. Ms. Sun is also the Special Representative to China for Connecticut Hedge Fund Association (CTHFA), and the APAC Representative for Greenwich Economic Forum (GEF) since its inception.

CONTRIBUTING

BRUCE MUSEUM

The Bruce Museum is a community-based, world-class institution highlighting art, science and natural history in more than a dozen changing exhibitions annually. The permanent galleries feature the natural sciences that encompass regional to global perspectives. The Bruce Museum is accredited by the American Alliance of Museums.

NON-PROFIT PARTNER

THE COUNCIL FOR ECONOMIC EDUCATION

The Council for Economic Education's (CEE's) mission is to equip K–12 students with the tools and knowledge of personal finance and economics so that they can make better decisions for themselves, their families, and their communities, and learn to successfully navigate in our ever-changing economy. We carry out our mission in three ways. We advocate to require financial and economic education in every state. We provide training, tools, and resources – online and live through over 180 affiliates nationwide – to more than 40,000 teachers annually who in turn bring the highest quality economics and personal finance instruction to over 4 million students. We deepen knowledge and introduce high school students to critical career capabilities through our National Personal Finance Challenge, National Economics Challenge and Invest in Girls program.

NON-PROFIT PARTNER

PATHWAYS

A Caring Path to Better Mental Health

Pathways,Inc. was established in 1981 by Greenwich families responding to the needs of relatives and others who were discharged from psychiatric hospitals following long periods of institutionalization and were often homeless or living in substandard dwellings. Today, the agency not only supports clients with 4 homelike residences located in Greenwich, Ct, we also target services for adults who live in the community with our weekday rehabilitation program and case management services. We are proud to have served hundreds of people living with a severe mental illness over our 30 year history.

NON-PROFIT PARTNER

NOAH HOLDINGS
NYSE: NOAH, HKEX: 6686

NOAH

China's Leading Pure-Play Independent Wealth Management Company

Noah Holdings ("Noah") is a pioneer in the client-centric and synergistic wealth management and asset management business model in China, as well as the first Chinese wealth management company listed in the U.S. and Hong Kong. Being the largest independent high-net-worth ("HNW") wealth management service provider in China, Noah manages wealth for HNW and socially responsible families and institutions by connecting leading asset managers around the world, and devotes ourselves to creating legacy for generations to come.

Noah's 100% owned subsidiary, Gopher Asset Management ("Gopher"), is one of the largest market-oriented private equity Fund of Funds in China. Gopher develops and provides comprehensive and tailored in-house products to supplement third party offerings.

Noah's wealth management business primarily distributes private equity, public securities and insurance products denominated in RMB and other currencies. Noah' s network covers 63 cities in mainland China, as well as Hong Kong (China), Taiwan (China), New York, Silicon Valley and Singapore.

68 cities and regions

Over 1,300 Relationship managers

RMB 980bn Accumulative financial products distributed since listing

RMB157bn AUM

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INTRODUCTION

Surfin Meta Digital Technologies Pte. Ltd. is disrupting the traditional banking model with its innovative approaches to provide digital financial solutions to underserved clients in emerging markets. Founded in 2017 as a consumer finance provider in Singapore, the company has rapidly expanded to 10 countries across Southeast Asia, Africa, and Latin America. Surfin's success can be attributed to its relentless commitment to transparency, inclusion, innovation, and compassion, which are at the heart of its digital solutions.

Led by its visionary founder and CEO, Yanan Wu, PhD, CFA, Surfin leverages Artificial Intelligence, Machine Learning, and Data Science to cater to the needs of the unbanked and under-banked populations. With ~35million registered users and a cumulative transaction amount of $1.7 billion USD, Surfin has achieved an average of 50% revenue growth for the past three consecutive years and double-digit net profit margin for the past two years. Its financial prowess is unmatched, with a revenue of $118 million USD and net profit of $18 million USD in 2022.

The company's expansion into other market segments, including Wealth Management, Payment, and Fintech-as-a-Service, has further solidified its position as a leader in the digital finance industry. Surfin has launched its first Visa card in Mexico, which will undoubtedly increase its consumer finance business. And with its IPO plan in the Singapore Exchange in Q4 2023, Surfin is poised to revolutionize the financial industry and continue its mission to provide innovative digital financial solutions to the underserved populations of emerging markets.

10
Countries of Operation

2,000+
Total Number of Employees

~35MM
Cumulative Registered Users

~2.2%
Cumulative Registered Users as % of Aged 15-64 Population in Countries of Operation

~$1.7B USD
Cumulative Transaction Amount

90%
Retention Rate

MISSON VISION VALUES

VISION

An innovative leader for digital banking empowerment in emerging markets

MISSION

Enrich more people through transparent and convenient digital financial services in developing countries

VALUES

Transparent,Inclusive,Innovative, Compassionate

FOUR CORE TECHNOLOGIES

CONSUMER FINANCE & CREDIT CARDS

- Smart Risk Control
- Big Data Behavior Analytics

PAYMENT & REMITTANCE

- Global Remittance
- Payment-as-a-Service

WEALTH & ASSET MANAGEMENT

- Social Investing
- Robo-Advisor
- Quantitative Investment

DIGITAL MARKETING & AI ADVISORY

- AIGC customer services
- Digital Advisor Being

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Many young people lack the basic financial knowledge and skills to prosper in life. CEE equips K-12 students with the tools and knowledge of personal finance and economics so that they can make better decisions for themselves, their families, and their communities, and learn to successfully navigate our ever-changing economy.

How we make progress

State Education Requirements → **Confident & Well-Trained Teachers** → **Engaged Students**

1. Ensure that every student has access to at least one personal finance and one economics course before they finish high school
2. Enable teachers to confidently deliver economics and personal finance coursework through educator-developed training and resources
3. Grow students' financial knowledge and career readiness through our national competitions and Invest in Girls program

Connecticut Passes Personal Finance Graduation Requirement

Goal

Train 500 CT teachers statewide

What

- Host 20+ professional development sessions over 2-years
- Provide free, online access to lessons, digital interactives, and pre-recorded trainings

Result

50,000 graduates meeting personal finance requirement

To learn more visit counciforeconed.org/CT


the proven alternative
Powering the world's alternative investment marketplace
Intuitive, sophisticated technology for wealth and asset managers, backed by local expertise around the globe
Build your private markets business with the world's comprehensive end-to-end alternative investment solution
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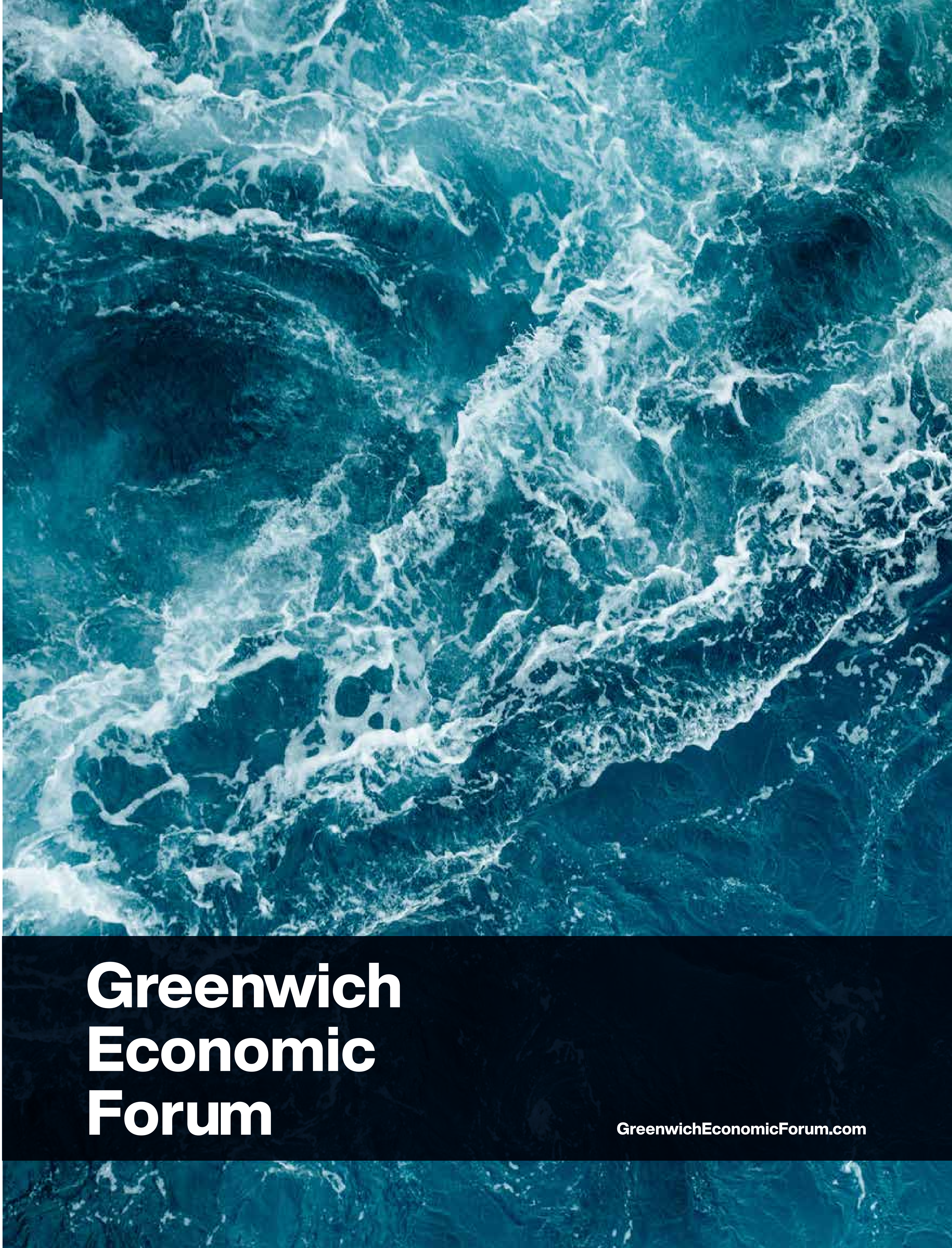

Greenwich Economic Forum

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