

AIMA & ACC's Private Credit Investor Forum

January 24, 2022



● AIMA Track

Monday, January 24, 2022

9:00 AM – 3:30 PM

AIMA Track

REGISTRATION OPENS: AIMA & ACC'S PRIVATE CREDIT INVESTOR FORUM

Location:

Splash Foyer

9:00 AM – 10:00 AM

AIMA Track

'MEET THE ALLOCATOR' BREAKFAST
INVITE ONLY

Location:

Splash 1-4

10:00 AM – 10:10 AM

AIMA Track

OPENING REMARKS

Speakers:

Jiří Król

Deputy CEO & Global Head of Regulatory Affairs, **AIMA**
& Global Head, **Alternative Credit Council**

Ron Biscardi

CEO and Co-Founder,
iConnections

Location:

Splash 9-12

10:10 AM – 11:00 AM

AIMA Track

LP ROUNDTABLE – IS PRIVATE CREDIT AN ASSET CLASS?

LPs consider where private credit fits in their portfolios and whether private credit will displace public bond allocations

Speakers:

Mary Bates

Managing Principal, Private
Markets Consultant,
Meketa Investment Group

Richard Grimm

Managing Director &
Private Credit Specialist,
Cambridge Associates

Craig Lehner

Senior Investment Officer,
**New York State Common
Retirement Fund**

Location:

Splash 9-12

Moderator:

Nicholas Smith

Director, Private Credit,
Alternative Credit Council

Anthony Waskiewicz

CEO and CIO, **Investment
Office Resources**

11:00 AM – 11:20 AM

AIMA Track

INTERVIEW: FINTECH X PRIVATE CREDIT

Technological disruption in financial markets is also creating new opportunities ranging from fintech lending platforms to decentralized finance (DeFi) to new distribution models. How can private credit managers and their investors profit from this innovation?

Speaker:

Daniel Khouri

Partner and Head of US
Investments, **Pollen
Street Capital**

Location:

Splash 9-12

Moderator:

Michelle Noyes

Managing Director,
Head of Americas, AIMA

11:20 AM – 11:45 AM

AIMA Track

FIRESIDE CHAT

Speaker:

Taylor Boswell

Chief Investment Officer,
Carlyle Direct Lending

Location:

Splash 9-12

Moderator:

David Scopelliti

Global Head of Private
Credit, **Mercer**

11:45 AM – 12:30 PM

AIMA Track

PANEL: COMPARABILITY AND STANDARDIZATION IN PRIVATE CREDIT

Focus on data, ratings, performance and loan documentation

Speakers:

Nicole Byrns

MD, Americas Structured
Credit and Financials,
CPPIB

Milwood Hobbs, Jr.

Managing Director & Head
of North American Sourcing
& Origination, **Oaktree
Capital Management**

Kristen Jones

Head of US Private Credit
and Senior Private Markets
Investment Due Diligence
Research Analyst, **Albourne**

Location:

Splash 9-12

Moderator:

Nicholas Smith

Director, Private Credit,
Alternative Credit Council

David Scopelliti

Global Head of Private
Credit, **Mercer**

12:30 PM – 1:30 PM

AIMA Track

'MEET THE ALLOCATOR' LUNCH

Location:

Glimmer Terrace

1:30 PM – 2:00 PM

AIMA Track

KEYNOTE FIRESIDE CHAT

Speakers:

Ashley Baum

Director of Special
Opportunities, Investment
Management Division,
**Teacher Retirement
System of Texas ("TRS")**

Dwight Scott

Global Head of Credit,
Blackstone Credit

Location:

Splash 9-12

Moderator:

To be announced

2:00 PM – 2:45 PM

AIMA Track

PANEL: 2022 TRENDS IN PRODUCT DESIGN AND THE RISE OF PRIVATE WEALTH

Private wealth clients have increasingly gravitated to private markets. What is the role of private credit in wealth management and mass affluent portfolios? What do GPs need to understand about investor education, investment vehicles and fund structure to appeal to this client base.

Speakers:

Nick Cimino

VP, Senior Manager
Research Analyst –
Alternative Strategies, **PNC
Asset Management Group**

Laurie Goodman

Global Head of Investment
and Wealth Solutions,
**Jefferies Wealth
Management**

Ricardo Lanfranchi

CEO & President, **Bradesco
BAC Florida Investments**

Moderator:

Susan Burkhardt

Partner, Funds &
Investment Management,
Clifford Chance

Patrick McGowan

Managing Director, Head of
Alternative Investments,
Sanctuary Wealth

2:45 PM – 3:30 PM

AIMA Track

PANEL: ESG AND PRIVATE MARKETS

Aligning outcomes and performance featuring insights from the Alternative Credit Council's Financing the Economy report

Speaker:

Stuart Fiertz

Co-Founder, President
and Head of Responsible
Investment, **Cheyne
Capital**

Lynn O'Connell, CAIA

Senior Portfolio Advisor,
Aksia

Peter Pulkkinen

Portfolio Manager,
Sustainable Private Credit,
**Lombard Odier Investment
Managers**

Moderator:

Unmesh Bhide

Managing Director, **J.P.
Morgan**; Co-Founder,
PricingDirect

3:30 PM – 6:00 PM

**SPONSOR APPRECIATION OASIS RECEPTION WITH DJ IRIE:
OPEN TO AIMA ATTENDEES, SPONSORS AND CLIENTS**

Hosted by:

AIMA and iConnections

Entertainment:

DJ IRIE, Miami Heat

NBA DJ of the Year