Family Office Forum: Where Capital and Purpose Converge

A separate, invitation-only gathering held in conjunction with the Global Capital Symposium, bringing together leading family offices, investment executives, and strategic partners for candid dialogue and actionable insight across private markets, portfolio construction, cross-border investing, and long-term capital allocation. Proceeds directly benefit the NAA Educational Institute, a 501(c)(3) organization that prepares high school and college students for careers in financial services through internships, fellowships, mentorship, and career-readiness programming.

TUESDAY, OCTOBER 13, 2026

12:00 PM — 1:00 PM	**Check-in, Lunch & Networking**
1:00 PM — 1:05 PM	**Welcome Remarks**
1:05 PM — 1:35 PM	**Capital Markets Outlook: U.S. Markets in a Shifting Global Environment** An institutional perspective on the macroeconomic and market forces shaping the U.S. investment landscape, including growth, inflation, interest rates, liquidity, and capital flows. The discussion will also examine how global economic conditions, geopolitical developments, and cross-border market dynamics are influencing asset allocation, risk management, and investment opportunities across public and private markets. • Moderator: **Patricia Pacheco de Baez**, Managing Director, Private Client Advisor, Bank Of America Private Bank • **Aditya Bhave**, Managing Director and Head of US Economics Research, Bank Of America
1:35 PM — 1:45 PM	**NAA Institute Pathway Fellows Spotlight**
1:45 PM — 2:30 PM	**Families as Allocators: How Sophisticated Family Offices Are Redefining Access to Private Markets** As family offices increasingly operate with the discipline of institutional investors while retaining the agility of founder capital, they are reshaping private markets from multiple angles — acting as GPs deploying niche strategies, as LPs across private equity, real estate, venture, credit, and secondaries, and as cross-border allocators navigating generational transition. This panel brings together principals from diverse family office structures to discuss how family capital is evolving its role in private markets, what it takes to earn and sustain family office LP commitments, and how emerging managers can position themselves as credible partners to this influential allocator class. • Moderator: **Nick Hendra**, Head of Heard Investment Management, Heard Capital • **Gustavo Dominguez**, CIO, W International Group • **Nicolas Ibanez**, President & Co-Founder, Drake Real Estate Partners • **Jennifer Magaña**, Managing Director - Private Markets, WLD Enterprises, Inc. • **Benjamin Slome**, Founder, New Vintage Partners
2:30 PM — 2:40 PM	**Networking Break**

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TUESDAY, OCTOBER 13, 2026

2:40 PM — 3:10 PM	**Fireside Discussion: Enhancing Legacy Preservation while Building a New Future – The Cape Capital Origin Story** One-on-one fireside chat between Cape Capital and Heard Capital. Ryan will tell the Cape Capital origin story and engage in a discussion around how they have approached team management over the last decade and why this has allowed them to be well positioned for the advent of AI. Ryan will further expound upon the evolution of Cape Capital from Single Family Office to Multi Family Office, the permanent capital vehicle he helps to oversee internally and externally, and how he approaches manager selection. • Moderator: **Nick Hendra**, Head of Heard Investment Management, Heard Capital • **Ryan Rojo**, Senior Private Equity Investment Professional, Cape Capital
3:10 PM — 3:20 PM	**Networking Break**
3:20 PM — 3:30 PM	**NAA Institute Pathway Fellows Spotlight**
3:30 PM — 4:15 PM	**Globalizing Family Capital: How South American Family Offices Expand Across Borders and Into Asset Management** This panel examines how leading regional families are evolving from local principal investors into global, institutional-style capital partners. The conversation will focus on how these family offices structure cross-border platforms, launch or back asset management vehicles, and partner with GPs and other LPs through co-investments and specialized mandates — highlighting implications for alignment, governance, and access to differentiated deal flow for allocators and managers alike. • Moderator: **Easley Edmunds**, Founding Partner, AmeriBridge Capital • **Kristina Chang**, CEO, Westlake Realty • **Alain Gamas**, Partner, Gamas Group FO • **Diego Grove**, Managing Director & Portfolio Manager, LRZ Capital • **Felipe Lattapiat**, Vice President, STARS REI
4:15 PM — 4:30 PM	**Closing Remarks** • **Laura M. Montoya**, New Mexico State Treasurer
4:30 PM — 5:30 PM	**Networking Reception** Sponsored by: o15 Capital Partners

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TUESDAY, OCTOBER 13, 2026

5:30 PM — 8:30 PM	**Welcome Reception** An opening reception bringing together allocators, managers, family offices, sponsors, and strategic partners to kick off the Symposium in a relaxed, relationship-driven setting for meaningful connection. Sponsored by: TPG

WEDNESDAY, OCTOBER 14, 2026

7:30 AM — 9:00 AM	**Institutional LPs and Trustee Breakfast** INVITE ONLY A private breakfast for institutional limited partners, trustees, consultants, and senior investment leaders to exchange perspectives on market conditions, governance, portfolio priorities, and capital allocation trends.
8:00 AM — 9:15 AM	**General Symposium Check-In & Breakfast**
9:15 AM — 9:30 AM	**Welcome and Opening Remarks**
9:30 AM — 10:10 AM	**The Consultant Spotlight: What Actually Gets a Manager Funded?** Strong performance may get a manager noticed, but it takes much more to earn institutional capital. Consultants are evaluating underwriting discipline, team quality, alignment, institutional fit, capacity, references, and the ability to execute consistently through changing market conditions. This conversation will explore what actually moves a manager from an interesting opportunity to a fundable institutional relationship. Panelists will discuss how consultants build conviction, what can strengthen or derail a diligence process, and how relationships, timing, references, and internal decision-making influence manager selection. The discussion will also examine how liquidity, secondaries, continuation vehicles, governance, and portfolio construction are shaping the way consultants evaluate opportunities and build durable private market portfolios. • Moderator: **Pamela Pavkov**, Managing Partner, TPG NEXT • **Judy Chambers**, Managing Principal, Markets Consultant, Meketa Investment Group • **Siddarth Sudhir**, Senior Partner and Co-CIO, RockCreek • **Richard Quigley**, Partner, Albourne Partners • **Schon Williams**, Alternatives Investment Director, Mercer
10:10 AM — 10:20 AM	**Networking Break**

WEDNESDAY, OCTOBER 14, 2026

10:20 AM — 11:05 AM

From Seed Capital to Scale: How GP Staking Partners Are Helping Build Emerging Managers

As fundraising cycles lengthen and capital continues to concentrate around larger platforms, GP staking and seeding partners are playing a growing role in helping emerging managers build sustainable investment firms.

This session explores how GP staking partners evaluate Funds I through III and support managers with anchor capital, GP commitment financing, operating resources, strategic guidance, and institutional infrastructure. Panelists will discuss what makes a manager attractive for partnership, how economics and governance are typically structured, and how managers can use these relationships to strengthen their platforms while preserving the flexibility and long term alignment needed to scale.

- Moderator: **Jessie Gabriel**, Managing Partner, All Places
- **Elizabeth A. Browne,** Managing Director, GCM Grosvenor
- **Gustavo Cardenas**, Managing Director & Co-Head of Strategic Partnerships, Wafra
- **Jason Howard**, Founder and Managing Partner, New Catalyst Strategic Partners
- **Marcus Lawrence**, Partner, TPG
- **Christopher L. Winiarz**, CIO, Stable

11:05 AM — 11:45 AM

Allocators in Focus: Institutional Perspectives on Portfolio Construction

This panel brings together senior investment leaders from leading public institutions to examine how allocators are positioning portfolios amid changing market conditions, evolving liquidity dynamics, and long-term return requirements.

The discussion will explore strategic asset allocation, private-markets pacing, manager selection, co-investments, and risk management across asset classes. Panelists will also share how they assess and access smaller, newer, and emerging managers—balancing the potential for differentiated sourcing, specialization, alignment, and return generation against the underwriting, operational due diligence, capacity, and governance considerations involved.

Expect a candid conversation on where institutional investors see opportunity, where they are becoming more selective, and how they are building durable portfolios for the long term.

- Moderator: **André Rice**, President, Muller & Monroe Asset Management, LLC
- **James Andrus**, Deputy Chief Investment Officer, New York State Insurance Fund
- **Jacob Stuckey**, CIO, Office of the Illinois State Treasurer.
- **Robert Q. Holley**, Executive Director, Baltimore Fire & Police ERS
- **Jon Salstrom**, CIO, Cincinnati Retirement System

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WEDNESDAY, OCTOBER 14, 2026	
11:45 AM — 12:15 PM	**Scaling While Investing: Building an Emerging Manager Platform in Real Time** A fireside chat featuring an emerging manager sharing candid lessons on simultaneously building a firm, raising a fund, and making disciplined investment decisions — a real-time look at team and culture, platform and pipeline, LP expectations, and portfolio construction while capital is still being raised and deployed. • Moderator: **Mandell Crawley**, Executive Vice President, Chief Client Officer, Morgan Stanley • **William Heard**, CEO & CIO, Heard Capital
12:15 PM — 12:35 PM	**Heritage and Empowerment Award** The Heritage and Empowerment Award honors a visionary leader whose powerful voice and steadfast dedication bridge the mission of the organization with its active execution. This award recognizes an individual who preserves the heritage and values of the organization while building pathways to the future—empowering others, championing equity, and ensuring that the mission remains alive at the heart of every initiative. The honoree exemplifies purposeful leadership, inspires growth, and strengthens both legacy and progress for generations to come.
12:35 PM — 12:50 PM	**Presentation: Latinos in Asset Management Report** • **Oswaldo Alvarez,** Executive Director, Illinois Legislative Latino Caucus Foundation
12:50 PM — 2:00 PM	**Networking Lunch** A dedicated networking lunch fostering meaningful engagement among allocators, managers, consultants, family offices, and sponsors.
2:00 PM — 2:30 PM	**LATAM Next Wave: How Institutional Capital Is Being Deployed Across the Region** This panel brings together leading institutional investors to discuss how they are deploying capital across Latin America amid shifting macro, political, and liquidity conditions — exploring where they are leaning in or pulling back across sectors and strategies, how they assess risk and governance in key markets, and what global GPs need to understand to partner effectively with the region's evolving LP base. • Moderator: **Nhora Otálora**, Managing Director, HarbourVest Partners • **Andrés Jablonski**, Deputy CIO and Head of Strategy and Alternative Assets at AFC, Chile • **Luiz Eugenio Junqueira Figueiredo**, Head of Investments at Bradesco Asset Management in Brazil • **Pedro Palma**, Managing Partner, Apex Capital

AGENDA

WEDNESDAY, OCTOBER 14, 2026

2:30 PM — 3:15 PM

Inside the Investment Process: The Evolving OCIO Playbook

An inside look at how OCIOs source, evaluate, and select investment managers across traditional and alternative asset classes, and how those decisions translate into diversified, multi-asset portfolios. The discussion covers manager due-diligence frameworks, hiring, monitoring, and termination decisions, and how OCIOs balance performance, risk, liquidity, fees, and governance as portfolios evolve to meet growing demand for private-market exposure and customized client solutions.

- Moderator: **Angel Herrera,** Deputy Chief Investment Officer, Office of the Illinois State Treasurer
- **Ian Fuller**, Chief Executive Officer, Westfuller Advisors, LLC
- **Tiffany McGhee**, Chief Executive Officer & Chief Investment Officer, Pivotal Advisors
- **Elijah Reese**, Head of Investment Manager Research & Strategy, Aon Investments
- **Omar Sanchez**, Partner for the Endowment & Foundation Practice, Cambridge Associates

3:15 PM — 3:55 PM

The New Credit Playbook: Selectivity, Structure, and Flexible Capital

As credit markets become more complex, compelling investment opportunities increasingly require more than simply providing capital. Managers must identify where risk is being mispriced, structure investments around specific borrower needs, and remain disciplined as capital moves across public credit, private lending, special situations, and the lower-middle market. This panel brings together three distinct but complementary investment perspectives: senior-secured lending and credit opportunities, special situations and opportunistic credit, and flexible debt and equity capital for growing lower-middle-market businesses.

The conversation will focus on how managers identify opportunities, determine where to invest within the capital structure, and distinguish investments with genuine downside protection from those where structural complexity may be masking underlying risks. Panelists will explore relative value across public and private credit markets, evolving liquidity and growth-financing needs, sponsor and borrower behavior, the use of payment-in-kind (PIK) interest and other structural features, and how increased competition and capital formation are affecting pricing and underwriting discipline.

The discussion will also examine how specialized credit strategies can complement traditional direct lending and what institutional investors should consider when evaluating managers, investment structures, and vehicles across today's broader credit market.

- Moderator: **Brian Shushkovsky**, Vice President, Aksia
- **Bill Maier**, Managing Director, Senior Portfolio Manager, Ramirez Asset Management
- **Maria Boyazny**, Founder & CEO, MB Global Partners
- **Monika Mantilla**, CEO & Co-Founder, Altura Capital

3:55 PM — 4:10 PM

Networking Break + Transition

WEDNESDAY, OCTOBER 14, 2026

4:10 PM — 5:00 PM	**Concurrent Deep Dive Breakouts:**
	Track A - Private Equity Through the Institutional Investor Lens: Getting Emerging Managers Through the Funnel As subdued distributions shift the institutional focus from IRR to DPI, private equity investors are scrutinizing how managers generate liquidity, differentiate returns, and build portfolios that perform through shifting cycles. In a market where LPs are liquidity-constrained, this session examines what it actually takes for an emerging manager to survive the institutional funnel. Senior fund-of-funds allocators and institutional LPs will debate how they weigh track record, sourcing advantages, and governance to separate a merely interesting strategy from an institutionally allocatable platform. Beyond traditional buyout models, the panel will explore the pivot toward less correlated return drivers—including royalties, litigation finance, insurance-linked opportunities, and specialty finance. Attendees will gain actionable insights on manager selection and the alternative liquidity tools reshaping the asset class today, discussing how NAV lending, continuation vehicles, and GP-led secondaries are altering the risk-return calculus for both established and emerging platforms. • Moderator: **Marquette Chester**, Senior Managing Director, Xponance Alternatives Solutions • **Salvador Almeida**, Managing Director, Head of LatAm for Hamilton Lane • **Michele Chow-Tai,** Managing Director, Business Development, Fairview Capital Partners • **Jessica Holsey**, Managing Director, GCM Grosvenor • **Alisha Forgerson,** CFA, Principal, StepStone Group
	Track B - Real Estate and Real Assets: Dislocation, Distress, and the Great Repricing As constrained liquidity and higher-for-longer rates trigger a fundamental repricing across property markets, this session identifies where structural stress is creating the next cycle's top opportunities. Senior allocators and real estate specialists will debate the market's most pressing questions: Is the office sector permanently impaired? Do private valuations reflect the reality of current financing costs? Are investors truly being compensated for illiquidity? Beyond traditional property recovery, the panel will explore the pivot toward distressed debt, rescue capital, and operationally intensive sectors. Attendees will gain actionable insights on underwriting discipline and manager selection, separating genuine structural demand from crowded narratives across data centers, energy-transition assets, and the full spectrum of housing—specifically build-to-rent, workforce, affordable, and student housing. • Moderator: **Chrissie Chen Pariso**, Managing Partner, MPowered Capital • **Manuel Casanga**, Director of Real Estate and Real Assets Investments, New York State Common Retirement Fund • **John Gluszak**, Head of Real Estate, at NYC Retirement Systems, NYC Office of the Comptroller • **Aaron Hancock**, Senior Vice President, Artemis Real Estate Partners • **Ermias Nessibu**, Executive Director, Real Estate Investments, GCM Grosvenor

WEDNESDAY, OCTOBER 14, 2026	
4:10 PM — 5:00 PM	**Concurrent Deep Dive Breakouts Continued**
	Track C - Private Credit at an Inflection Point: Where Capital Is Finding Its Edge Private credit is entering a more selective phase. As traditional direct lending becomes more competitive, institutional investors are looking beyond the core market for differentiated sources of income, protection, and return. This conversation will examine where capital is finding its edge today across asset based and specialty finance, non sponsor lending, hybrid and structured capital, credit secondaries, and opportunistic strategies. Panelists will discuss how they assess underwriting quality, structural protection, liquidity, complexity, and portfolio fit, as well as where greater caution may be warranted as the market broadens. The session will also explore the role of emerging managers and specialist platforms, particularly where proprietary sourcing, asset level expertise, and differentiated underwriting can create an advantage. Attendees will gain a current institutional perspective on which credit strategies are attracting greater attention, which areas are becoming more crowded, and what managers need to demonstrate to earn institutional conviction in an evolving credit market. • Moderator: **Mohamed Elkordy**, Ph.D, Senior Portfolio Manager, New York State Common Retirement Fund • **Daniel Brown**, Assistant Vice President, Callan • **Christopher Shelby**, Senior Principal, Cerity Partners • **Brian Shushkovsky**, Vice President, Aksia
5:00 PM — 6:30 PM	**Networking Reception** A reception to continue conversations from the day's programming and create additional opportunities for relationship-building. Sponsored by: PALLADIUM

Women Shaping Capital Breakfast Series

A breakfast conversation highlighting women leaders across the investment ecosystem and their perspectives on leadership, capital allocation, entrepreneurship, and shaping the future of finance.

THURSDAY, OCTOBER 15, 2026	
7:00 AM — 7:15 AM	**Check-in & Breakfast**
7:15 AM — 7:25 AM	**Welcome Remarks** • **Danielle Beyer**, Chief Operating Officer, L2 Point Management
7:25 AM — 8:05 AM	**Who's Missing From the Table? The Case — and the Path — for Women on Boards** A candid look at the data and lived experience behind diverse boards—how varied perspectives sharpen decision-making, expand blind spots, and ultimately strengthen returns for institutions and investors alike. Panelists will pull back the curtain on how they actually got there: building a board-ready profile, finding sponsors and search firms, and knowing when (and how) to raise your hand. • Moderator: **Pilar Avila**, Interim CEO, Latino Corporate Directors Association (LCDA) • **Desiree Castillejos**, Independent Board Member • **Kerstin Dittmar**, Founder & Managing Partner, L2 Point Management • **Laura M. Montoya,** New Mexico State Treasurer
8:05 AM — 8:35 AM	**Everyone Watches: The Business Behind Women's Sports** Ahead of their appearance on the main stage for Women's Sports: The Next Great Asset Class, panelists sit down first for a smaller, more candid conversation. The conversation moves past market sizing and valuation into the real, unfiltered experience: building credibility as a woman in the room, courting investors who are still learning to take the category seriously, and shifting the narrative from the inside out. Fewer numbers, more truth: what it's like to pitch, to be underestimated, and to prove the thesis in real time — before they take it to the main stage. • Moderator: **Kelly Cook**, CEO & Executive Producer, The Ardory • **Betsy Morgan**, Co-Founder, Swish Partners • **Renee Noto**, CEO, Palm Beach Sports Management • **Sara Toussaint**, Co-CEO and Co-Owner, TMJ | NC Courage | Querétaro FC
8:35 AM — 9:00 AM	**Networking**

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THURSDAY, OCTOBER 15, 2026	
8:00 AM — 9:15 AM	**General Symposium Check-In & Breakfast**
9:15 AM — 9:30 AM	**Welcome and Opening Remarks** • **David Perez**, Co-Founder & Managing Partner, Avance Investment Management
9:30 AM — 10:00 AM	**Fireside: Where Capital Meets Conviction — Inside TPG NEXT** A conversation on how investors are making decisions in a more complex market, where conviction, discipline, access, and differentiated perspectives increasingly drive long-term performance. TPG NEXT was built on the premise that the next generation of high-performing alternative managers will come from founders traditional capital has too often overlooked. Anilu Vazquez-Ubarri — Partner and Chief Operating Officer of TPG, founding member and executive sponsor of TPG NEXT — will unpack how the platform is seeding and staking emerging managers, with a focus on underrepresented leaders, and what it takes to business-build the GPs of the future. • Moderator: **Kerstin Dittmar**, Founder & Managing Partner, L2 Point Management • **Anilu Vazquez-Ubarri,** Partner & COO, TPG; Founding Sponsor, TPG NEXT
10:00 AM — 10:45 AM	**LATAM Family Office Perspective: Alternative Investments in Mexico and South America** Family offices from the United States, Mexico, and across South America are increasingly evaluating alternative investments through a cross border lens. This discussion will explore opportunities in private equity, private credit, real assets, infrastructure, venture capital, and direct investments, as well as the role of managers, co investments, and strategic local partnerships in accessing them. Panelists will consider how differences in capital markets, currency exposure, regulation, and operating environments shape underwriting and portfolio construction, and where long term family capital can create an advantage across the Americas. • Moderator: **Nick Hendra**, Head of Heard Investment Management, Heard Capital • **Rodrigo Lopez Buenrostro**, CIO, Kue Capital • **Joel Levin**, CIO, LCA Capital • **Karlo Teran**, CEO, HFCC • **Francisco Valdes**, CIO, Olivo Capital

AGENDA

THURSDAY, OCTOBER 15, 2026	
10:00 AM — 10:45 AM	**NAA Global AI Exchange:**
	Transforming the GP — How Asset Management Firms Can Build AI-Powered Workspaces for Their Own Operations Asset management firms are deploying technologies within their own businesses to enhance investment, underwriting, and valuation workflows. Hear from the founder of a purpose-built platform engineered around financial workflows on the practical considerations, opportunities, and risks. • **John Abbott**, CEO and Co-Founder, Bullpen • **Eddie Ramos**, Chief Strategy Officer, Leadview Capital
	AI Is Eating the World: How We're Underwriting (and Building) Through It Software ate the world. Now AI is eating software — and venture dollars are following at a pace the industry has never seen. In Q1 2026 alone, AI companies captured 80% of the $300bn in global venture funding, up from 55% just a year earlier. In this fireside chat, two investors building through the shift — Adrianna Samaniego of Cherryrock Capital and Alejandro Guerrero of Act One Ventures — discuss how they are underwriting AI deals, where opportunity sits beyond the frontier labs, and how their own firms use AI internally to run smarter, faster funds. • **Adrianna Samaniego**, Partner, Cherryrock Capital • **Alejandro Guerrero**, Co-Founder and General Partner, Act One Ventures
10:45 AM — 11:00 AM	**Networking Break**
11:00 AM — 11:30 AM	**AI in the Physical World** AI is stepping off the screen and into factories, battlefields, and supply chains, changing how nations build things, defend themselves, and compete. As AI moves from generating information to acting in the real world, what new industries, capabilities, and geopolitical advantages come with it? This session will explore the convergence of AI, robotics, autonomous systems, and world models, and what it means for defense and global supply chains. Dr. Gourley will discuss the escalating U.S.-China race across chips, industrial capacity, robotics, and autonomous weapons, plus why rebuilding resilient domestic supply chains has become a strategic imperative. • **Sean Gourley**, Founder, Primer

THURSDAY, OCTOBER 15, 2026	
11:30 AM — 12:10 PM	**The Evolving Private Capital Playbook: How Family Offices Are Becoming Institutional** With greater scale, deeper investment teams, and a growing appetite for direct investments, co investments, customized mandates, and long term partnerships, family offices are increasingly operating like sophisticated institutional allocators. At the same time, institutional investors are embracing many of the flexible, relationship driven approaches traditionally associated with family capital. This discussion explores what is driving this convergence, where capital is moving, and how the evolving private capital landscape is reshaping the relationship between investors and managers. Panelists will examine what GPs must do to earn commitments, structure strategic partnerships, deliver differentiated access, and stand out in an increasingly competitive market. • Moderator: **Michael Weinberg**, Special Advisor, Tokyo University of Science Endowment • **Renata Aráuz-DeStefano**, Investor, Pivotal Ventures • **Rodrigo Garcia**, CFO & U.S. President, Talipot • **Konrad von Moltke**, Principal, WISE Ventures/Wilf Family • **Salvador Said**, Managing Partner, AMSA/30N Ventures • **Hernan van Waveren**, CIO, Werthein Family Office
11:30 AM — 12:10 PM	**NAA Global AI Exchange:**
	The End of the Billable Hour — A New Kind of Law The legal industry is seeing the rise of innovative models — venture-style, technology-enabled practices that embed generative AI, automation, and structured data into the core delivery of legal services, redesigning legal work, staffing, pricing, and client experience rather than simply improving lawyer productivity at the margin. Hear from a Founding Partner of an AI-native, transaction-focused law firm that combines senior legal expertise with an automated AI stack to execute complex corporate transactions faster and at lower cost. • **Francisco Morales**, Founding Partner, Irving LLP
12:10 PM — 12:25 PM	**Organizational Insight**
12:25 PM — 1:10 PM	**Women's Sports: The Next Great Asset Class** This panel brings together pioneering athletes turned investors alongside the owners and operators building the institutions around them, exploring how capital is flowing into women's leagues, teams, media rights, and fan infrastructure — and why the window for early positioning is now. The discussion examines the forces driving accelerating valuations, how athlete-investors and institutional owners think about long-term value creation, and what it means to build enduring franchises at the intersection of culture, conviction, and market opportunity. • Moderator: **Renee Noto**, CEO, Palm Beach Sports Management • **Betsy Morgan**, Co-Founder, Swish Partners • **Sara Toussaint**, Co-CEO and Co-Owner, TMJ | NC Courage | Querétaro FC • **Jasmine Robinson**, Managing Partner, Monarch Collective

THURSDAY, OCTOBER 15, 2026	
12:25 PM — 1:10 PM	**NAA Global AI Exchange:**
	Transforming the GP — How Asset Management Firms Can Build AI-Powered Workspaces for Their Own Operations Asset management firms are deploying technologies within their own businesses to enhance investment, underwriting, and valuation workflows. Hear from the founder of a purpose-built platform engineered around financial workflows on the practical considerations, opportunities, and risks. • **John Abbott**, CEO and Co-Founder, Bullpen • **Eddie Ramos**, Chief Strategy Officer, Leadview Capital
	Enterprise AI in the Middle Market Private equity firms are grappling with how to accelerate the AI transformation of existing portfolio companies and underwrite to the risk and opportunity of new investments in a rapidly changing technology environment. • **Gustavo Parés**, Founder and CEO, Key Prediction • **Gerson R. Guzman**, Managing Partner, Ceiba Capital Partners
1:10 PM — 2:25 PM	**Networking Lunch** A networking lunch designed to connect family offices, institutional investors, managers, founders, and strategic partners around shared investment themes and opportunities.
2:25 PM — 3:05 PM	**Independent Sponsors at Scale: A New Blueprint for the Emerging Manager Model** This discussion explores how Independent Sponsors are becoming an increasingly compelling pathway for new and emerging managers to build a track record and scale thoughtfully, and how leading Independent Sponsors are translating transaction-by-transaction success into institutional platforms, broadening capital relationships, and building durable franchises for long-term growth. • Moderator: **Sylvie Gadant,** Managing Partner, Transaction Advisory Services, Citrin Cooperman • **Robert S. Azeke**, Managing Partner, Farol Asset Management • **Chelsea Celistan**, Principal, Deal Team Head of Independent Sponsor & Company Direct Investment Strategy, Avante Capital Partners • **Ellen Lieberman,** Managing Director, TIFF • **Angel Morales,** Founding Partner, Mako Capital Group • **Amy Ridge**, Managing Director, Head of Solutions Strategy, Cambridge Associates

THURSDAY, OCTOBER 15, 2026	
2:25 PM — 3:05 PM	**NAA Global AI Exchange:**
	The End of the Billable Hour — A New Kind of Law The legal industry is seeing the rise of innovative models — venture-style, technology-enabled practices that embed generative AI, automation, and structured data into the core delivery of legal services, redesigning legal work, staffing, pricing, and client experience rather than simply improving lawyer productivity at the margin. Hear from a Founding Partner of an AI-native, transaction-focused law firm that combines senior legal expertise with an automated AI stack to execute complex corporate transactions faster and at lower cost. • **Francisco Morales**, Founding Partner, Irving LLP
	Female Funders and Founders — Outperformance Hiding in Plain Sight A candid conversation about building a venture capital firm focused on backing successful female entrepreneurs. • **Laura Moreno Lucas,** Partner, Libra and L'ATTITUDE Ventures • **Connie Yang**, CEO and Co-Founder, Nth AI
3:05 PM — 3:20 PM	**Networking Break & Transition**
3:20 PM — 4:20 PM	**Concurrent Deep Dive Breakouts**
	Track A - The Direct Deal Spotlights: Behind the Deal with Independent Sponsors and Search Funds The old PE playbook — raise first, deploy later — is losing ground. A new generation of independent sponsors and search fund entrepreneurs is flipping the model: find the deal, then raise around it. This session will examine why capital is migrating from blind-pool funds toward deal-by-deal control, and highlight managers who are executing direct deals as independent sponsors and searchers. These opportunities will highlight why direct, deal-specific capital is outpacing commingled funds in the lower middle market, and what LPs need to know before backing the next cohort of independent operators and searchers. • Moderator: **Gerson R. Guzman**, Managing Partner, Ceiba Capital Partners • **Pete Amaro**, Founding Partner, Mako Capital Group • **Matias Tavella**, Managing Partner, Ventus Capital Partners • **Juan Pablo Aguad**, Founder and Managing Partner, Aguad Capital Partners • **Azhar Quader**, Queens Court Capital

THURSDAY, OCTOBER 15, 2026

3:20 PM — 4:20 PM	Concurrent Deep Dive Breakouts

Track B - Inside the LP Investment Committee

This is not a traditional panel. Three venture managers present their actual funds. Then three LPs discuss what they heard, the way they would in an investment committee, while the audience listens in.
The goal is not to pick winners or make investment decisions. It is to show the audience how LPs actually think: what earns their attention, how they evaluate opportunities, and what they would want to diligence next.

- Moderator: **Jose Pinero**, Executive Director, Somos VC
- **Renata Arauz-DeStefano**, Investor, Pivotal Ventures
- **Russell Deakin**, Chief Investment Officer & Founding Partner, Aceana Group
- **Shaydi DeJesus**, Managing Partner, Full Spectrum Capital

Track C - Entrepreneur Spotlight: The Pitch

This breakout puts founders in front of the room. Endeavor brings eight entrepreneurs to the stage, each with three minutes to pitch their company directly to allocators, family offices and fund managers. There's no panel and no moderator between the audience and the companies, just the founders, what they're building and the markets they're building it in. Judges and the audience score the pitches live, and the session closes with a winner announcement and an open floor to meet the founders one on one. Attendees walk out with a real read on where entrepreneurial innovation is happening right now, plus a short list of companies worth a follow-up call.

Track D - The Emerging Manager Debate

The same GP can walk into five LP meetings and essentially be talking to five different markets. Each LP may be evaluating the same manager, the same strategy and the same opportunity, but their ability to invest may be shaped by different governance structures, investment policies, statutory requirements, approval authorities, consultant involvement, portfolio construction, mandates, internal resources, discretion, timing and pacing.
The goal is not to determine which LP process is better. The goal is to help GPs understand that there is no single institutional LP playbook. A manager needs to understand the investor, the institution and the process before determining how best to approach them.

- Moderator: **Kenneth Saffold**, Managing Partner, o15 Capital Partners
- **Taffi Ayodele**, Head of Diverse & Emerging Manager Strategy, Asset Management, Office of the New York City Comptroller
- **Sylvester “Sly” McClearn**, Director, New York State Common Retirement Fund
- **Miguel Silva**, Investment Manager, Head of Emerging Manager Strategy, CalPERS
- **Kirk Sims**, Managing Director & Head of Emerging Manager Program, TRS
- **Marlene Timberlake D'Adamo**, Managing Director, Maryland State Retirement and Pension System

GLOBAL CAPITAL SYMPOSIUM
Widening the Investment Aperture

October 13–15, 2026
Miami, Florida
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New America Alliance

AGENDA

THURSDAY, OCTOBER 15, 2026	
4:20 PM — 4:35 PM	**Transition to General Session**
4:35 PM — 5:45 PM	**Table Talks: LPs and GPs in Roundtable Conversations** For the first time at the Global Capital Symposium, institutional LPs, funds of funds, family offices, consultants, and GPs come together around the same tables for candid, interactive conversations about raising and deploying capital. Unlike a traditional panel, Table Talks gives managers direct access to the allocators and advisors who influence investment decisions — covering diligence gaps, portfolio construction, governance, alignment, and evolving underwriting standards. In addition to the featured panelists, additional funds of funds, consultants, OCIOs, family offices, and institutional allocators will each host a table and lead a focused discussion on a timely capital-formation theme.
5:45 PM — 6:00 PM	**Closing Remarks + 2027 Announcement**
6:00 PM — 8:00 PM	**Closing Reception** We close the NAA Global Capital Symposium with a celebratory farewell as we toast to new connections, shared insights, and the vibrant spirit of Miami. Sponsored by: AVANCE

FRIDAY, OCTOBER 16, 2026	
7:30 AM	L2Point **Run Club**

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