



NAAONLINE.ORG

International Symposium

Shaping The Future

| of Asset & Investment Fund Management

September 25-26, 2024

St. Regis
Mexico City, Mexico





ORGANIZATIONAL SUMMARY

The New America Alliance is a national not-for-profit industry association dedicated to empowering women and diverse professionals and firms in the asset management investment industry, with a particular focus on the Hispanic, Latino, and Latina communities.

Our guiding core principles:

Capital Access & Excellence: We promote Hispanic and Latino-owned firms, seeking equitable access to capital. We are committed to exposing institutional investors to the excellent capabilities of small and diverse managers and ensuring that these high-performing fund managers are recognized.

Education and Industry Engagement: With our comprehensive educational programs and industry-wide events, we remain committed to our members' growth and success and to increasing participation, representation, and promotion of diverse professionals. We aim to build a community in which innovation, opportunity, and the diverse talents of Hispanics are embraced and celebrated. Through targeted networking, education, internships, mentorship, and sponsorships, we strive to break down the barriers that prevent our members from achieving success in the marketplace. As an organization, we are a catalyst for positive change. We foster an environment of inclusion that leverages the collective experience and wisdom of our dynamic community, promoting the prosperity of both our community and our industry.

Our vision is to shape a more diverse and inclusive future in the asset management investment industry, where the expertise and contributions of Hispanic, Latino, and Latina professionals and firms are not just recognized but are actively sought after to transform the industry. We aim to solidify our role as the leading advocate for these diverse professionals and firms, establishing new benchmarks in the industry. We are committed to fostering a landscape where our members achieve prominent recognition and substantial growth, with a strategic goal of tripling Hispanic, Latino, and Latina representation in the sector. This reflects our dedication to inclusivity and our promise of delivering tangible and measurable impact.



WHAT TO EXPECT

The New America Alliance is heading to Mexico City for our International Symposium on September 25th and 26th. This event signifies a major step in our organization's expansion into Latin America. We are uniquely positioned as an organization that serves diverse asset managers, to help build pivotal connections between Latino and Latina managers in the U.S.A. as well as capital allocators from across Latin America.

Our goal is to provide our members with unparalleled opportunities to broaden their global influence and forge ties with a varied investor base. As the foremost Latino asset management organization in the U.S.A. representing diverse managers, this symposium represents a natural progression for us to lead in bridging the gap between Latin American allocators and Latino and Latina emerging managers who are generating alpha in the U.S.A., as well as to provide exposure to North American allocators seeking investment opportunities throughout the region.

This symposium is designed to promote education and networking between capital allocators from throughout the Western Hemisphere. Our focus is to establish connections between investors and allocators to promote joint growth and prosperity. We are committed to facilitating an environment where meaningful conversations can take place about portfolio construction, sourcing investment opportunities, addressing challenges, and offering mutual support in navigating the intricacies of global capital markets.

The event will provide capital allocators access to investment opportunities across the New America Alliance member community and enhance our members' ability to raise capital beyond their domestic borders. Participants will have the chance to engage with a wide network of entities such as Fund Managers, Insurance Companies, Pension Funds, Fund-of-Funds, Consultants, Endowments, Foundations, Sovereign Wealth Funds, High Net Worth Individuals, Family Offices, and Multi-Family Offices.

Mexico is renowned not only for its beauty but also for its delectable cuisine, rich culture, diverse traditions, and joyous people. The Mexico Cultural Reception promises to be an immersive journey into Mexico's vibrant and rich culture. This event will also provide a unique opportunity to network and forge personal connections with thought leaders from across the Americas outside of a conference setting.

Event Schedule **September 25**

8:30 AM – 9:45 AM	Check-in & Networking Breakfast
9:45 AM – 10:00 AM	Opening Ceremony and Welcome Remarks
10:00 AM – 10:15 AM	Organizational Insights: FTI Consulting
10:15 AM – 11:00 AM	Unlocking Mexico's Investment Potential: Overcoming Challenges and Seizing Nearshoring Opportunities
11:00 AM – 11:15 AM	Organizational Insights: Latino Corporate Directors Association (LCDA)
11:15 AM – 12:00 PM	Fireside Chat: Insights on Growth Equity and Leadership with Orlando Bravo
12:00 PM – 12:15 PM	Organizational Insights: ALMA
12:15 PM – 1:00 PM	The Role of Investment Advisors as Intermediaries
1:00 PM – 1:15 PM	Organizational Insights: United States Hispanic Chamber of Commerce (USHCC)
1:15 PM – 2:00 PM	Fund-of-Funds: Amplifying Diversification in Investment Portfolios
2:00 PM – 3:00 PM	Lunch and Networking
3:00 PM – 3:45 PM	The Future of Portfolio Strategy: Insights from Global CIOs and CEOs
3:45 PM – 4:30 PM	Fostering Ties: Building Lasting Relationships with Family Offices
4:30 PM – 5:15 PM	Success Stories: Regional Transformation through Innovation
5:15 PM – 5:30 PM	Organizational Insights: Latino Business Action Network (LBAN)
5:30 PM – 6:30 PM	Startup Pitch Competition
6:30 PM – 6:45 PM	Symposium Wrap-up
7:30 PM – 11:00 PM	Mexico City Cultural Reception

Event Schedule September 26

8:30 AM – 9:45 AM	Check-in & Networking Breakfast
9:45 AM – 10:00 AM	Opening Ceremony and Welcome Remarks
10:00 AM – 10:15 AM	Organizational Insights: Asociación Mexicana de Administradoras de Fondos para el Retiro (AMAFORE)
10:15 AM – 11:00 AM	Keynote Fireside Chat: The Future of U.S.A and Mexico Relations – Strengthening Ties
11:00 AM – 11:15 AM	Market Insights - Opportunistic Credit and Distressed Debt: Key Trends Reshaping the Sector
11:15 AM – 12:00 PM	Fireside Chat: Navigating Growth and Strategy with José E. Feliciano
12:00 PM – 12:15 PM	Market Insights - Apollo
12:15 PM – 1:15 PM	The Global CIO Playbook: Optimizing Portfolios with Alternative Investments
1:15 PM – 2:00 PM	Fireside Chat: Mastering Growth – Scaling a Private Equity Fund and Expanding into New Verticals
2:00 PM – 3:00 PM	Lunch and Networking
3:00 PM – 3:30 PM	Fireside Chat: Navigating Success in Venture Capital - A Journey of Resilience and Triumphd Networking
3:30 PM – 4:15 PM	Real Estate: Navigating Trends, Challenges, and Opportunities
4:15 PM – 4:30 PM	From Spin-Out to Success: Launching and Scaling Your First Investment Fund
4:30 PM – 5:15 PM	Navigating Challenges and Strategies in Alternative Investments
5:15 PM – 5:30 PM	Organizational Insights: Hispanic Heritage Foundation (HHF)
5:30 PM – 6:15 PM	The Power of Fund-of-Funds: Leveraging Expertise for Portfolio Success
6:15 PM – 6:30 PM	Closing Remarks
6:30 PM – 8:00 PM	Closing Reception

September 25

The Master of Ceremonies



Roberto Carmona
President & Chief Executive Officer
Carmona Strategic Solutions

Check-in

8:30 AM – 9:45 AM

Event Check-in / Networking / Breakfast

Opening General Session

9:45 AM – 10:00 AM



Leon Brujis
Chair of the Board of Directors, New America Alliance
Partner & Head of East Coast, 65 Equity Partners



Anyori (AJ) Hernandez
President and Chief Executive Officer
New America Alliance

Organizational Insights: FTI Consulting

10:00 AM – 10:15 AM

An insightful discussion on Mexico and US relations and how alternative investments play a part in that relationship.



Jose Cepeda
Senior Managing Director
FTI Consulting



Damián Martínez Tagüeña
Managing Director
FTI Consulting

Unlocking Mexico's Investment Potential: Overcoming Challenges and Seizing Nearshoring Opportunities

10:15 AM – 11:00 AM

In a shifting global landscape, the US-Mexico partnership is more crucial than ever. This discussion explores key investment opportunities, regulatory and infrastructure challenges, and the benefits of nearshoring. Attendees will gain insights into how the banking industry is planning for the next 5-10 years, with Mexico's strategic proximity, skilled workforce, and favorable trade agreements positioning it as a prime nearshoring destination. Join us to explore the key factors shaping this evolving collaboration.



MODERATOR

María Ariza

Chief Executive Officer

BIVA (Bolsa Institucional de Valores) Institutional Stock Exchange



Emilio Cadena

Chief Executive Officer

Prodensa



Emilio Romano

Chief Executive Officer

Bank of America in Mexico

Organizational Insights: Latino Corporate Directors Association (LCDA)

11:00 AM - 11:15 AM

Despite progress in corporate board diversity, Latinos remain significantly underrepresented. Addressing this requires more than surface-level initiatives; it calls for a deeper, strategic focus.

Discover how the Latino Corporate Directors Association (LCDA), the largest network of U.S. Latinos serving on corporate boards and in the C-suite, is leading the charge. With a data-driven approach, LCDA is raising the visibility of Latino board talent and working to increase Latino representation on corporate boards.



Ozzie Gromada Meza

President and Chief Executive Officer

Latino Corporate Directors Association (LCDA)

Fireside Chat: Insights on Growth Equity and Leadership with Orlando Bravo

11:15 AM – 12:00 PM

Dan Bienvenue speaks with Orlando Bravo, a leading private equity fund manager, who has successfully managed substantial investments for limited partners worldwide. The conversation will explore Orlando Bravo's approach to crafting and implementing effective investment strategies and their impact on growth equity. Orlando Bravo will also discuss his journey, highlighting key achievements and lessons learned in his career, offering a unique perspective on the intersection of strategy, growth, and leadership in private equity.



MODERATOR

Dan Bienvenue

Deputy CIO and Head of

Capital Markets

California Public Employees' Retirement System



Orlando Bravo

Founder and Managing Partner

Thoma Bravo

As the first Latino-led investment club of its kind, ALMA is dedicated to championing and amplifying the impact of underrepresented and emerging fund managers. Focused on Latinx venture capital managers and the founders they support, ALMA is built on the core values of reputation, institutionality, commitment, and collaboration. Adhering to ILPA standards, the club is committed to fostering growth by cultivating strategic Limited Partner (LP) relationships for its members.



José Luis Silva
Co-Founder and Managing Partner
Dux Capital

The Role of Investment Advisors as Intermediaries

12:15 PM – 1:00 PM

A panel of distinguished consultants and investment advisors will highlight their pivotal role in enhancing public pension plans and helping them achieve strategic goals. They will discuss using their expertise in investment strategies, risk management, and regulatory compliance to ensure efficient and sustainable pension plan management in addition to facilitating communication between plan sponsors, trustees, and stakeholders, as well as aligning diverse interests and fostering trust.

MODERATOR



Erol Uzumeri
Co-founding Partner
Searchlight Capital
Partners

PANELISTS



Judy Chambers
Managing Principal,
Private Markets
Consultant
Meketa Investment
Group, Inc.



Alex Dauria
Senior Portfolio Advisor
Aksia



Texas Hemmaplardh
Partner
Mercer





Jasmine N. Richards
Managing Director, Head
of Diverse Manager
Research
Cambridge

Organizational Insights: United States Hispanic Chamber of Commerce (USHCC)

1:00 PM – 1:15 PM

Empowering Latino Business Leaders

The USHCC will highlight the achievements of both rising and established Latino business leaders. This session will showcase the significant contributions and accomplishments of USHCC member firms, demonstrating how they drive innovation, foster diversity, and create opportunities within the business landscape. Attendees will gain insights into the strategies behind their success and learn about the future of Latino leadership in the business world.





Victor Arias, Jr.
Managing Director and Partner
United States Hispanic Chamber of Commerce (USHCC)

Fund-of-Funds: Amplifying Diversification in Investment Portfolios 1:15 PM – 2:00 PM

This panel will explore the critical role of Fund-of-Funds in the investment landscape, particularly as a strategic tool for achieving diversification and managing risk. Acting as an extension of an investor’s team, Fund-of-Funds allow Limited Partners to access a wide range of investment opportunities through a single vehicle. By investing in a diversified portfolio of other funds, these vehicles enable investors to tap into specialized markets and strategies that might otherwise be out of reach, making them especially valuable for those with limited resources or expertise in specific areas.



Whether you’re a Limited Partner or a General Partner, this discussion will clarify how Fund-of-Funds operate, the value they add to a portfolio, and the strategic advantages they offer. Our expert panelists will provide insights into how Fund-of-Funds can enhance portfolio construction, complement direct investment strategies, and ultimately amplify overall portfolio performance.

MODERATOR



Miguel (Michael) Silva
Associate Investment Manager
Sustainable Investments
California Public Employees' Retirement System (CalPERS)

PANELISTS



Christian Kallen
Co-Head of Fund
Investment &
Managed Solutions
Hamilton Lane



Luis Perezcano
Managing Director
StepStone



Ed Powers
Managing Director
HarbourVest



Pamela Pavkov
Managing Partner
TPG NEXT

Institutional Investors: Navigating the Future of Portfolio Strategy

3:00 PM - 3:45 PM

Gain invaluable insights from a panel of distinguished institutional investment leaders as they discuss the evolving landscape of portfolio strategy and the growing importance of alternative investments. The panelists will explore the strategic integration of private equity, real estate, infrastructure, and hedge funds to enhance diversification and risk-adjusted returns. They will also address risk mitigation strategies and share their perspectives on the current market conditions and outlook for the next 12 to 18 months. Attendees will learn how institutional investors are adapting their portfolios to seize opportunities and navigate challenges in an ever-changing global market.

MODERATOR

HARBOURVEST



Carlos Mauricio López Suaza
Principal of Investor Relations
HarbourVest

PANELISTS

skandia



Jaime Álvarez
Chief Investment
Officer for Latin
America
Skandia Group

J.P.Morgan



Patricia Hidalgo
Head of Alternatives
JP Morgan

LACERA
Los Angeles County Employees Retirement Association

Jude Perez
Deputy Chief
Investment Officer
Los Angeles County
Employees Retirement
Association (LACERA)

Afore Coppel



Juan Manuel Valle Pereña
Chief Executive Officer
Afore Coppel

Fostering Ties: Building Lasting Relationships with Family Offices

3:45 PM - 4:30 PM

This panel explores cultivating relationships with family offices, highlighting the importance of understanding their perspectives and nurturing long-term connections. Gain insights into trust-building, personalized service, and aligning with family values and goals. Learn strategies for fostering enduring relationships, effective communication, and adapting to evolving needs. Panelists will share their experiences and offer guidance for anyone seeking to engage successfully with family offices.

MODERATOR



Adriana Tortajada

Chief Executive Officer and Managing Partner
1200 VC

PANELISTS



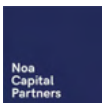
Brett Ashley Barth

Founding Partner
Capital Creek
Partners



**Daniel Lorenzen
Maldonado**

Investor Relations &
New Developments
LOMA Desarrollos



Daniel Sabag Galindo

Principal
NOA Capital



Andres Medina Mora

General Manager
CompuSoluciones
Ventures





Success Stories: Regional Transformation through Innovation

4:30 PM – 5:15 PM

This panel brings together visionary founders of thriving startups and seasoned investors from Mexico's burgeoning ecosystem. Gain exclusive insights into their innovative approaches to leveraging cutting-edge technologies and forward-thinking strategies to revolutionize the region. Discover how they are driving economic growth through job creation and attracting significant investments.

MODERATOR







Susana Espinosa de los Reyes
Partner
Dux Capital

PANELISTS



María Fernanda
Founder
Abildgaard,
AdoptaHero,
Agrinos, FarmX





Enrique Ozovieki
Founder
Chilim Balam






José Medina Mora
Founder & CEO
Compusoluciones

Organizational Insights: Latino Business Action Network (LBAN)

5:15 PM – 5:30 PM

State of Latino Entrepreneurship in the U.S.

Get the latest overview on Latino entrepreneurship in the U.S. from LBAN, a Silicon Valley-based nonprofit with a unique partnership with Stanford dedicated to empowering Latino entrepreneurship. Do you know why the U.S. is experiencing a Latino tsunami of opportunity and growth? Or how that impacts the economy and entrepreneurship in the U.S.? This is a compelling overview for everyone, especially if you are an entrepreneur, capital allocator, corporate, or government representative. Additionally, get a brief overview of LBAN's Business Scaling programs at Stanford for Latino business owners.





Arturo Cázares
Chief Executive Officer
Latino Business Action Network (LBAN)

We're building the bridge for a thriving global ecosystem by bringing together renowned allocators, serial entrepreneurs, venture capitalists, and top executives, all while creating a platform for up-and-coming Latin American startups. The Startup Pitch Competition is a dynamic event designed to provide a platform for early-stage companies. The competition kicks off with a success testimony from Edrizio de la Cruz, co-founder of Arcus, and author of *The Underdog Founder*. Arcus was one of Alpha 8 Impact's first exits when it was acquired by Mastercard in 2021. Visionary entrepreneurs will pitch their companies for a chance to win up to \$500k in funding (pending due diligence).

During the competition, four carefully selected finalists will have 5 minutes to pitch their startup followed by a 5-minute Q&A with our panel of VC experts. Public voting will determine the winner. The future of innovation is here. Get ready to discover promising early-stage startups and vote for your favorite solution to the world's most significant challenges!

SPEAKER



Edrizio de la Cruz

Co-Founder

Arcus (acquired by Mastercard in 2021)

Bestselling Author

The Underdog Founder

JUDGES



Carlos Ochoa

Managing Partner

Alpha Impact 8

Ventures



Iliana Quiñonez

Director, Customer

Engineering,

North America Startups

Google



Daniel Santamarina

Managing Partner

Dux Capital

New American Alliance shares highlights from the day before setting the scene for the evening cultural reception.

65 EQUITY
PARTNERS



Leon Brujis

Chair of the Board of Directors, New America Alliance
Partner & Head of East Coast, 65 Equity Partners

**New
America
Alliance**



Anyori (AJ) Hernandez

President & Chief Executive Officer
New America Alliance

End of Day 1



September 26

The Master of Ceremonies



Roberto Carmona
President & Chief Executive Officer
Carmona Strategic Solutions

Check-in

8:30 AM – 9:45 AM

Event Check-in / Networking / Breakfast

Opening General Session

9:45 AM - 10:00 AM



Daniel Ilundain
President & Co-Head Flagship Funds
Palladium Equity Partners

Organizational Insights: Asociación Mexicana de Administradoras de Fondos para el Retiro (AMAFORE)

10:00 AM - 10:15 AM

Strengthening Mexico's Pension System and Promoting Near-Shoring Opportunities

Amafore (Mexican Association of Retirement Fund Administrators), is dedicated to strengthening Mexico's pension system by representing and coordinating the interests of pension fund administrators (Afores). Acting as a bridge between Afores, government authorities, and financial institutions, Amafore ensures a robust and transparent pension system. The keynote discussion will focus on how Amafore promotes near-shoring opportunities, supporting economic resilience and growth in Mexico by attracting foreign investment and fostering local economic development.



Guillermo Zamarripa
President
Mexican Association of Retirement Fund Administrators (AMAFORE)

Keynote Fireside Chat: The Future of U.S.A and Mexico Relations – Strengthening Ties

10:15 AM - 11:00 AM

Michelle DiGruttolo, a distinguished expert in geopolitical risk and resilience with over three decades of experience in intelligence and strategic risk management, will engage in a conversation with the United States Ambassador to Mexico and the Honorable Henry Cisneros. Together, they will explore the evolving dynamics of U.S.-Mexico relations, providing a deeper understanding of the strategic partnership between the two nations and its influence on the global stage. Both the Ambassador and Henry Cisneros will share valuable insights on key policy initiatives, bilateral agreements, and the critical role of diplomacy in addressing today's most pressing challenges.

MODERATOR



Michelle DiGruttolo

Global Geopolitical Risk Intelligence Advisor
Sage Raven Advisors

AMERICAN
TRIPLE I



The Honorable Henry Cisneros

Co-Founder and
Executive Chairman
American Triple I Partners



**The Honorable
Ken Salazar**

United States
Ambassador to Mexico

Market Insights - Opportunistic Private Credit: Key Trends Reshaping the Sector

11:00 AM - 11:15 AM

This session delves into the evolving landscape and opportunities of private credit, highlighting key trends that are redefining the sector. As market volatility and economic uncertainty rise, situations for investors to capitalize on high relative value opportunities will increase. Experts will explore how flexible, opportunistic strategies are navigating the current market landscape, discuss the role of private credit in higher and lower interest rate environments through economic cycles and uncover emerging opportunities in the sector. Attendees will gain valuable insights into how these trends are influencing investment decisions and reshaping the future of the sector.



Samuel A. Ramirez

President and CEO
Ramirez Asset Management



Bill Maier

Senior Portfolio Manager
Ramirez Asset Management

Fireside Chat: Navigating Growth and Strategy with José E. Feliciano

11:15 AM – 12:00 PM

Experience an illuminating fireside chat with José Feliciano, a distinguished private equity fund manager responsible for managing billions of dollars on behalf of global investors. José delves into Clearlake's distinctive investment strategies and pivotal decisions that propel equity growth. The conversation will explore essential leadership qualities needed to navigate fund scaling complexities, conquer challenges, and capitalize on opportunities. Gain valuable insights from José's achievements, offering a comprehensive perspective on thriving in the competitive private equity realm.



MODERATOR

Anastasia Titarchuk

Chief Investment Officer

New York State Common Retirement Fund



José E. Feliciano

Co-Founder and Managing Partner

Clearlake Capital Group

Market Insights: Generating Alpha in the New World

12:00 PM – 12:15 PM

For the last few decades, investors benefited from tailwinds. 2022 marked a turning point; the cost and availability of capital became fundamentally different. Sponsors face a challenging deal and exit environment. How do PE managers create alpha in the "new world"? Are there new opportunities?

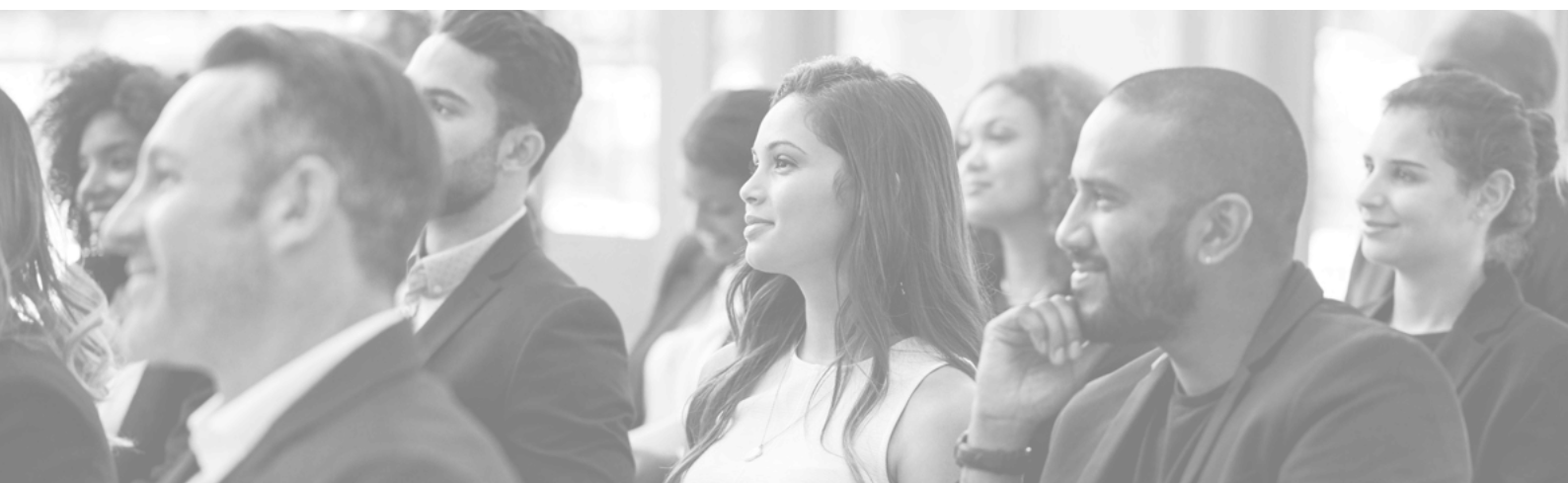
APOLLO



David Sambur

Co-Head of Equity

Apollo



The Global CIO Playbook: Optimizing Portfolios with Alternative Investments

12:15 PM – 1:15 PM

International Chief Investment Officers from leading retirement and pension plans will explore the strategic role of alternative assets in modern investment portfolios. The discussion will cover the benefits of incorporating alternative assets such as private equity, real estate, and hedge funds to diversify traditional portfolios, along with the unique risks associated with these investments and strategies to mitigate them. Panelists will also discuss the market conditions anticipated over the next 12 to 18 months and how they position their portfolios to navigate investment opportunities and challenges.

MODERATOR



Javier Saade

Partner

Presidio Investors; Fenway Summer; Impact Master Holdings

PANELISTS



Eneas Kądziela

Deputy Chief
Investment Officer
and Head of Private
Equity
NYC Office of the
Comptroller



Dan Bienvenue

Deputy CIO and Head
of Capital Markets
California Public
Employees' Retirement
System



**Leonardo Franco
Villa Reynolds**

Chief Investment
Officer
Afore XXI Banorte



Abdiel Santiago

Chief Executive Officer and
Chief Investment Officer
Fondo de Ahorro de
Panamá



Antonio Sibaja

Chief Investment Officer
Profuturo

Fireside Chat: Mastering Growth – Scaling a Private Equity Fund and Expanding into New Verticals

1:15 PM – 2:00 PM

Join us for an insightful fireside chat as an industry leader shares his experiences and strategies for scaling a private equity fund. This discussion will explore the nuances of expanding into new verticals, highlighting the art and science behind identifying opportunities, managing risks, and driving sustainable growth. Gain valuable perspectives on how to navigate the challenges of scaling while maintaining a strong investment thesis, and learn practical approaches to broadening your fund's reach in an increasingly competitive market.



MODERATOR

Jude Perez

Deputy Chief Investment Office

Los Angeles County Employees Retirement Association (LACERA)



Milton Berlinski

Co-Founder and Managing Partner

Reverence Capital Partners

Lunch and Networking

2:00 PM – 3:00 PM

Fireside Chat: Navigating Success in Venture Capital - A Journey of Resilience and Triumphant Networking

3:00 PM - 3:30 PM

Join us for an enlightening fireside chat with a distinguished venture capitalist who has successfully raised a third fund amidst one of the toughest economic environments. This session will delve into the remarkable story of how his team came together to create one of the best-performing firms in the venture industry. Hear firsthand about the strategies and insights that led their previous vintage fund to outperform and outpace peers. This discussion promises to offer valuable lessons on resilience, team dynamics, and strategic fund management that are crucial for any aspiring or seasoned investor in the venture capital space.



MODERATOR

Sylvester "Sly" McClearn

Director of the Emerging Manager Program

New York State Common Retirement Fund



Alejandro Guerrero

Co-Founder & General Partner

Act One Ventures

Real Estate: Navigating Trends, Challenges, and Opportunities

3:30 PM - 4:15 PM

Explore the evolving real estate landscape amid geopolitical shifts and economic challenges. This panel delves into emerging trends, such as remote work, changing consumer demands, and the impact of nearshoring on industrial real estate. Gain insights from industry experts on how nearshoring is reshaping supply chains, boosting logistics demand in Mexico, and creating new investment opportunities domestically. This discussion is essential for real estate professionals aiming to stay ahead in a rapidly changing market.

MODERATOR



David De La Rosa
Managing Partner
Brava Management

Board Member
Terrafina (MX REIT)

Director Member
LCDA

PANELISTS



Eliza Bailey
Co-Founder, Chief
Executive Officer and
Chief Investment Officer
Belay Investment Group

CCM GROSVENOR



Peter Braffman
Managing Director
GCM Grosvenor

ARTEMIS
REAL ESTATE PARTNERS



Aaron Hancock
Vice President
Artemis



From Spin-Out to Success: Launching and Scaling Your First Investment Fund

4:15 PM – 4:30 PM

In today's competitive business environment, spinning out to create a new investment fund is both challenging and rewarding. Success requires a clear strategic vision, a strong leadership team, and the ability to attract top-tier investment professionals. Building an institutional-grade back office is essential for maintaining compliance and operational efficiency. Additionally, raising capital demands a compelling fundraising strategy and the cultivation of strong investor relationships. By effectively managing these key elements, entrepreneurs can turn their spin-out into a thriving investment firm poised to make a significant impact in the financial world.



MODERATOR

David Perez

Co-Founder and Managing Partner
Avance Investment Management

Navigating Challenges and Strategies in Alternative Investments

4:30 PM – 5:15 PM

Join us for an insightful panel as we delve into the pressing challenges of fundraising and execution within the alternative investments landscape. This session will explore effective strategies to overcome common obstacles faced by fund managers and investors, providing practical solutions for navigating the complexities of the industry. Our distinguished panelists will share their expertise and discuss the latest trends and products in alternative investments. Gain valuable insights and actionable takeaways to enhance your approach to alternative investment strategies.

MODERATOR



Rei Tran

Mission Investments
Ford Foundation

PANELISTS



Tiffany McGhee
Chief Executive Officer
and Chief Investment
Officer
Pivotal Advisors



Chrissie Pariso
Managing Director
MPOWERED



Tina Byles Williams
Chief Executive Officer,
Chief Investment Officer
and Founder
Xponance

Empowerment Through Connection: Inspiring and Preparing Latinos

As Latinos continue to grow as a significant demographic in the United States and abroad, we will discuss how the Hispanic Heritage Foundation (HHF) is playing an essential role in empowering Latinos. HHF focuses on six key areas: education, workforce, social impact, justice, culture, and leadership. The Hispanic Heritage Foundation is crucial in shaping the future of the Latino community and contributing to the broader societal fabric both in the United States and internationally.



Emanuel Pleitez
Chairman
Hispanic Heritage Foundation (HHF)

The Power of Fund-of-Funds: Leveraging Expertise for Portfolio Success

5:30 PM - 6:15 PM

This panel will explore the vital role that Fund-of-Funds play in the investment landscape, particularly for Limited Partners seeking to optimize their portfolios. Fund-of-Funds act as an extension of an investor's staff, providing access to diversified investment opportunities across various asset classes, regions, and strategies. By pooling capital and leveraging the expertise of seasoned fund managers, these vehicles enable investors—especially those with limited resources or specialized knowledge—to achieve broad diversification, mitigate risks, and capitalize on emerging trends. Whether you're a Limited Partner or a General Partner, this discussion will provide a clear understanding of how Fund-of-Funds operate, their strategic advantages, and how they can enhance portfolio success. Our panel of experts will delve into the mechanics of Fund-of-Funds, share insights on selecting the right fund managers, and discuss the ways these vehicles can complement direct investment strategies to maximize returns.

MODERATOR



Ramon Fernandez
Head of LatAm
Goldman Sachs Asset Management

PANELISTS



Carlos Caraveo
Chief Executive Officer
Fondo de Fondos
Mexico



Derek Jones
Vice Chairman
Grosvenor Capital
Management



André Rice
President
Muller & Monroe Asset
Management



Matthew Shellenberger
Senior Manager, Asset
Allocation and Risk
Management
W.K. Kellogg Foundation

Symposium Wrap-up

6:15 PM – 6:30 PM

New American Alliance shares highlights from the day before setting the scene for the evening cultural reception.

65 EQUITY
PARTNERS



Leon Brujis

Chair of the Board of Directors, New America Alliance
Partner & Head of East Coast, 65 Equity Partners

**New
America
Alliance**



Anyori (AJ) Hernandez

President & Chief Executive Officer
New America Alliance

Closing Reception

6:30 PM – 8:00 PM

AVE
HAND CRAFTED TEQUILA

ZOMOS

End of Day 2



International Symposium

Sponsors



PLATINUM

**AMERICAN
TRIPLE I**

INFRASTRUCTURE | INNOVATION | INVESTMENT



AVANCE



SIRIS

International Symposium

Sponsors



GOLD



International Symposium

Sponsors



SILVER



KIRKLAND & ELLIS



CONNECTOR

APOLLO



**Baker
McKenzie.**



CLEARY GOTTlieb



International Symposium

Sponsors



PARTNER

AVANTE
CAPITAL PARTNERS



Goldman Sachs Asset Management

HARBOURVEST



TAG TELSEY
ADVISORY
GROUP

ALCOHOL



ZOMOS

SUPPORT



QuantumIQ
Capital

TrustServe

International Symposium

Planning Committee



Gerson Guzman - Planning Committee Chair

Co-Founder
Ceiba Capital Partners



Leon Brujis

Chairperson of the Board
New America Alliance

Partner and Head of East Coast US
65 Equity Partners



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