



NAAONLINE.ORG

Regional Event: Spotlight on Private Equity & Credit

May 7, 2025
4:00pm – 8:30pm

SheppardMullin
30 Rockefeller Center





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 its prosperity 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.

Event Schedule

May 7, 2025

4:00 PM – 5:20 PM	Check-in & Welcome Reception
5:20 PM – 5:25 PM	Welcome Remarks
5:25 PM – 5:30 PM	In Focus 501c3
5:30 PM – 6:10 PM	The Devil in the Details: 5 Costly Pitfalls in Purchase Agreement Negotiations
6:10 PM – 6:15 PM	Breakout Transition
6:15 PM – 7:00 PM	Concurrent Discussions
	Concurrent Discussions: Credit
6:15 PM – 6:20 PM	In Focus: Manager Insights
6:20 PM – 7:00 PM	Navigating Institutional Due Diligence: Setting Credit Managers Up for Success
	Concurrent Discussions: Private Equity
6:15 PM – 6:20 PM	In Focus: Manager Insights
6:20 PM – 7:00 PM	Institutional Readiness: Preparing Private Equity Managers for Investment and Operational Due Diligence
6:15 PM – 7:00 PM	Speed Networking
7:00 PM – 7:05 PM	In Focus: Manager Insights
7:05 PM – 8:30 PM	Networking Reception

AGENDA

Check-in

4:00 PM – 5:20 PM

Event Check-in / Networking / Reception

Welcome Remarks

5:20 PM – 5:25 PM



Anyori (AJ) Hernandez

President and Chief Executive Officer
New America Alliance

In Focus: 501c3

5:25 PM – 5:30 PM

Through its 501(c)(3) arm, the NAA Institute, the organization creates opportunities for the next generation of leaders by offering initiatives like the Pathway Fellowship Program and Gateway Scholarship Program.

These programs provide mentorship, career exposure, and financial support to high school and college students—primarily those of Latino/a descent, as well as students from all backgrounds who are committed to advancing the mission of the NAA. The focus is on building a pipeline of future leaders in fields such as entrepreneurship, business, and finance, while helping to elevate the socioeconomic trajectory of students who are eager to learn, contribute, and excel.



Ricardo Montemayor

Fordham University
2023 Fellow at Empiric Institutional

AGENDA

The Devil in the Details: 5 Costly Pitfalls in Purchase Agreement Negotiations

5:30 PM – 6:10 PM

This discussion will help managers navigate the top legal pitfalls when acquiring companies, covering topics such as:

- The “We Will Figure It Out Later” Trap – Ambiguous Terms and Undefined Adjustments
- Surprise! The Gotcha Risks in Representations, Warranties, and Indemnities
- The Dreaded Working Capital Adjustment – Avoiding an Accounting War
- Hidden Landmines in Covenants and Interim Operating Restrictions
- Overly Aggressive Earnout Provisions – When Deferred Consideration Becomes a Lawsuit Waiting to Happen

MODERATOR

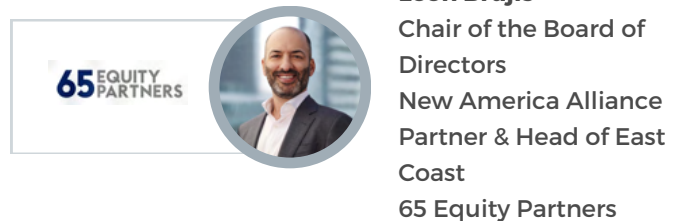


Linda Igarashi
Partner
Sheppard Mullin

PANELISTS



Lauren Bonner
Managing Partner
MBM Capital



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



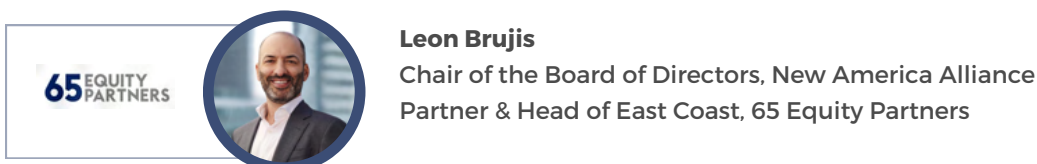
Santiago Castelazo
Partner
Citation Capital



Jay Garcia
Managing Partner &
Co-Founder
Altura Capital

Breakout Instruction

6:10 PM - 6:15 PM



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

CONCURRENT DISCUSSIONS

Concurrent Discussions - CREDIT

6:15 PM - 7:00 PM

In Focus: Manager Insights

6:15 PM - 6:20 PM

New America Alliance members welcome attendees and offer brief introductions, highlighting their investment strategies and their firms' areas of expertise. These insights will provide valuable context, helping to frame the broader conversation and give allocators and investors in the room a clear understanding of the perspectives represented. Their remarks will set the tone and transition seamlessly into the next segment.

Chestnut Run Capital Partners is a private-credit investment manager delivering non-dilutive, flexible financing solutions to small and lower-middle-market companies in the climate, human-health, and education sectors.



Yeng Felipe Butler
Managing Partner
Chestnut Run Capital Partners

Navigating Institutional Due Diligence: Setting Credit Managers Up for Success

6:20 PM - 7:00 PM

As institutional investors continue to expand their credit allocations, emerging managers face increasing scrutiny in the due diligence process. Beyond performance, investors are evaluating fund structure, risk management, portfolio transparency, operational infrastructure, and compliance. This panel will provide actionable insights into:

- What consultants and institutional investors expect from credit managers during diligence
- Common red flags and pitfalls that derail commitments
- Best practices for building a scalable and institutional-grade platform
- How credit managers can differentiate themselves in a competitive market

MODERATOR



Michael A.B. Orr
Managing Director and Chief Investment Officer, Alternatives
Xponance

PANELISTS



Gaurav Ahuja
Senior Vice President,
Co-Head, Enhanced
Middle Market Credit,
Voya



Robert Holley
Executive Director,
Baltimore Fire & Police
Employees' Retirement
System



Brad Meyers
Managing Director
GCM

CONCURRENT DISCUSSIONS

Concurrent Discussions - PRIVATE EQUITY

6:15 PM - 7:00 PM

In Focus: Manager Insights

6:15 PM - 6:20 PM

New America Alliance members welcome attendees and offer brief introductions, highlighting their investment strategies and their firms' areas of expertise. These insights will provide valuable context, helping to frame the broader conversation and give allocators and investors in the room a clear understanding of the perspectives represented. Their remarks will set the tone and transition seamlessly into the next segment.

Altura is a private investment firm that opportunistically invests in debt and equity in the small and lower-middle markets, emphasizing overlooked and undercapitalized high-growth opportunities in the consumer products, business services, specialty manufacturing, and healthcare industries.



Monika Mantilla

President and Chief Executive Officer
Altura Capital

Institutional Readiness: Preparing Private Equity Managers for Investment and Operational Due Diligence

6:20 PM - 7:00 PM

For private equity managers seeking institutional capital, being prepared for consultant-led due diligence is essential. As investors and regulators intensify their scrutiny, managers must demonstrate strong operational infrastructure, compliance controls, and risk management protocols to meet evolving standards.

This panel will provide a roadmap for private equity managers to:

- Understand what consultants look for during due diligence reviews
- Prepare for potential regulatory oversight
- Avoid common compliance pitfalls that can jeopardize investor commitments
- Develop best-in-class operational and reporting practices to instill confidence

MODERATOR



Jason Howard

Founder and Managing Partner
New Catalyst Strategic Partners

PANELISTS



Judy Chambers

Managing Principal,
Private Markets
Consultant,
Meketa



Jenith Jacob

Vice President, Fund
Investment & Managed
Solutions team,
Hamilton Lane



Robert Nelson

Principal and Private
Equity Senior
Specialist,
Mercer



Luis Sued

Director, Diversified
Alternative Equity,
Barings

CONCURRENT DISCUSSIONS

Speed Networking

6:15 PM - 7:00 PM

Eight managers deliver 5-minute elevator pitches introducing their firms and strategies in a dynamic, fast-paced session designed for efficient discovery and direct engagement.

- BlackRock
- Brightwood
- Citation Capital
- Three Court
- Float Partners
- Varadero Capital
- Tech Wild Catters
- Altura

JUDGES

	 Michele A. Chow-Tai Managing Director, Business Development Fairview Capital Partners	 Brad Johnson Head of Private Credit, State of New Jersey, Division of Investment
	 Grace Juhn Senior Investment Officer, Alternative Credit, New York City Office of the Comptroller	 Sylvester McClearn Director of Emerging Managers, New York State Common Retirement Fund
	  Antonio Rodriguez Director of Investments, Building Service 32BJ Benefit Funds	

In Focus: Manager Insights

7:00 PM - 7:05 PM

New America Alliance members close the day and offer brief introductions, highlighting their investment strategies and their firms' areas of expertise. These insights will provide valuable context, helping to frame the broader conversation and give allocators and investors in the room a clear understanding of the perspectives represented.

o15 Capital Partners is an alternative investment firm that opportunistically invests in debt and equity to support undercapitalized companies and communities across the Healthcare, Education, and Business Services industries.

	 Javier Davila Principal o15 Capital Partners
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Networking Reception

7:05 PM - 8:30 PM

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ORGANIZATION SPONSORS

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Contact

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