



All Days **Mon Mar 24** Tue Mar 25 Wed Mar 26

AGENDA for Monday, March 24, 2025

2:20 PM



2:20 PM - 3:15 PM PDT (55 Min)

Registration and Refreshments

3:15 PM



3:15 PM - 3:20 PM PDT (5 Min)

Opening Remarks

3:20 PM



3:20 PM - 3:50 PM PDT (30 Min)

Keynote Interview



3:50 PM



3:50 PM - 4:30 PM PDT (40 Min) ⁽⁵⁾

How Long will America's Economic Foundations Hold?

4:30 PM



4:30 PM - 6:00 PM PDT (1 Hour, 30 Min)

Cocktail Reception



All Days Mon Mar 24 **Tue Mar 25** Wed Mar 26

AGENDA for Tuesday, March 25, 2025

7:45 AM



7:45 AM - 8:45 AM PDT (1 Hour)

Breakfast & LP-Only Exchange



7:45 AM - 8:45 AM PDT (1 Hour)

Breakfast for All Attendees

8:45 AM



8:45 AM - 9:05 AM PDT (20 Min)

Opening Remarks with Market Trends Overview from With Intelligence

9:05 AM



9:05 AM - 9:35 AM PDT (30 Min)

Keynote Allocator Interview



9:35 AM

(21)



9:35 AM - 10:15 AM PDT (40 Min)

Private Credit: The Next Systemic Risk or Here for the Long Game?

10:15 AM



10:15 AM - 10:55 AM PDT (40 Min)

US Equities: the Bronco Begins to Buck

10:55 AM



10:55 AM - 11:15 AM PDT (20 Min)

Headline Sponsor Presentation

11:15 AM



11:15 AM - 11:45 AM PDT (30 Min)

Coffee & Refreshments



11:45 AM



11:45 AM - 12:15 PM PDT (30 Min)
(21)

Breakout: Track A - Co-Investments: How Much is Too Much?



11:45 AM - 12:15 PM PDT (30 Min)

Breakout: Track B - In an Alpha-Strapped World, What Value do Hedge Funds Offer?

12:20 PM



12:20 PM - 12:55 PM PDT (35 Min)

Breakout: Track A - With US Exceptionalism Surging On, How Can Emerging Markets Compete?



12:20 PM - 12:55 PM PDT (35 Min)

Breakout: Track B - Has Bitcoin Finally Become a Legitimate Financial Instrument?



12:55 PM



12:55 PM - 1:55 PM PDT (1 Hour) ⁽²¹⁾

Networking Lunch Break

2:00 PM



2:00 PM - 2:40 PM PDT (40 Min)

Will the Mismatch Between Buyers and Sellers in Private Equity Ever Narrow?

2:40 PM



2:40 PM - 3:20 PM PDT (40 Min)

Is ESG in America Dead?

3:20 PM



3:20 PM - 3:40 PM PDT (20 Min)

Headline Sponsor Presentation



3:40 PM



3:40 PM - 4:10 PM PDT (30 Min) ⁽²¹⁾

Coffee & Refreshments

4:10 PM



4:10 PM - 4:50 PM PDT (40 Min)

Public Debt: Why Go Private?

4:50 PM



4:50 PM - 5:30 PM PDT (40 Min)

How Should you Manage Distressed Assets in your Real Estate Portfolio?

5:30 PM



5:30 PM - 6:10 PM PDT (40 Min)

Strategic Asset Allocation Needs a Rethink. But How?



6:15 PM



6:15 PM - 7:45 PM PDT (1 Hour, 30 Min)
(21)

Cocktail Reception



All Days

Mon Mar 24

Tue Mar 25

Wed Mar 26

AGENDA for Wednesday, March 26, 2025

7:45 AM



7:45 AM - 8:45 AM PDT (1 Hour)

Breakfast for All Attendees

8:45 AM



8:45 AM - 8:50 AM PDT (5 Min)

Opening Remarks

8:50 AM



8:50 AM - 9:20 AM PDT (30 Min)

Keynote Allocator Interview



9:20 AM



9:20 AM - 10:00 AM PDT (40 Min)
(18)

GP Stakes: Where's the Exit Sign?

10:00 AM



10:00 AM - 10:20 AM PDT (20 Min)

Headline Sponsor Presentation

10:20 AM



10:20 AM - 10:50 AM PDT (30 Min)

Coffee & Refreshments

10:50 AM



10:50 AM - 11:20 AM PDT (30 Min)

Breakout: Track A - As Geopolitics Heats up, will Oil and Gas Continue to be Undercapitalized?



10:50 AM - 11:20 AM PDT (30 Min)

Breakout: Track B - With ⁽¹⁸⁾All the Hype, where is the True Value in Decarbonization?

11:25 AM



11:25 AM - 11:55 AM PDT (30 Min)

Breakout: Track A - How Much Are You Willing to Give Up with Continuation Vehicles?



11:25 AM - 11:55 AM PDT (30 Min)

Breakout: Track B - What Role Should Allocators Play in Fixing America's Broken Infrastructure?

11:55 AM



11:55 AM - 12:55 PM PDT (1 Hour)

Networking Lunch Break



1:00 PM



1:00 PM - 1:40 PM PDT (40 Min) ⁽¹⁸⁾

The Dragon's Last Dance: Can China Bounce Back?

1:40 PM



1:40 PM - 2:20 PM PDT (40 Min)

Will Traditional Secondaries Fade when Exit Avenues Rebound?

2:20 PM



2:20 PM - 3:20 PM PDT (1 Hour)

Energizer Break

3:20 PM



3:20 PM - 4:00 PM PDT (40 Min)

How Would the Death of the \$1 Trillion Artificial Intelligence Boom Affect Your Portfolio?



4:00 PM



4:00 PM - 4:40 PM PDT (40 Min) ⁽¹⁸⁾

The CIO Conclusion

4:40 PM



4:40 PM - 4:45 PM PDT (5 Min)

Closing Remarks

4:45 PM



4:45 PM - 6:00 PM PDT (1 Hour, 15 Min)

Cocktail Reception