

INSTITUTIONAL REAL ESTATE LATIN AMERICA FORUM 2015

April 13-14
New York, NY

The Sofitel

 MARKETS GROUP





Institutional Real Estate Latin America Forum 2015

April 13-14 | The Sofitel | New York, NY

Dear Colleague,

It is with great pleasure that I invite you to join us at the third annual Institutional Real Estate Latin America Forum in New York City, New York. This meeting is a part of our General Meeting within the Real Estate series, providing the latest insight into institutional opportunities in the Americas, comprised of:

- A two-day meeting focusing on new and established funds in the market as well as JV and direct investment opportunities in the Americas.
- Topics will cover perspectives of various types of institutional investors, from family offices to sovereign wealth funds in addition to direct investment by international investors.
- Speaker faculty of over 70 industry leaders that includes pension funds, foundations, endowments, real estate consultants, family offices, multi-managers, real estate funds, developers and other market participants that will shape the real estate market in 2015.

We have developed the program to examine opportunities within the region with the needs of institutional investors in mind. We will continuously strive to provide the most updated intelligence on real estate investment allocations in Latin America.

We are looking forward to hosting you at the conference.

Regards,
Andres Ortiz
Latin Markets

ABOUT US

Latin Markets is the world's leading provider of Americas focused investment forums, infrastructure summits and streamlined market intelligence.

Through our specialized forums in Brazil, Colombia, Chile, Peru, Mexico, Panama and the United States, we provide the latest market intelligence to our network of more than 5,000 institutional investors, fund managers, advisors and industry thought leaders worldwide.

REAL ESTATE SERIES

Andean Inst. Real Estate Forum
Bogota, Colombia
June 1-2, 2015

Real Estate Brazil Forum
São Paulo, Brazil
September 29-30, 2015

Real Estate Mexico Forum
Mexico City, Mexico
December 3-4, 2015

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Abacus Real Estate is a real estate financial services firm. It has a team with over 30 years of combined experience and US \$500 million of Transactions involving advisory, structuring, and management in the Colombian real estate market. In Abacus we believe in generating a responsible and sustainable business model with our stakeholders that assures the excellence in managing and operating third-party capital.



AC Capitaes is an investment fund manager established in Perú. It started operations in 2002 and is duly regulated by the Superintendency of Securities Market (Superintendencia del Mercado de Valores). AC Capitaes is part of the APOYO Group, and is a subsidiary company of APOYO Consultoría, one the most prestigious consultancy firms in Perú. It's main investors include both private and public pension funds and insurance companies. AC Capitaes has developed two investment platforms, for real estate and private equity. So far, it has executed seven capital raising processes, with a total in excess of US\$ 900 MM committed. Overtime, the firm has executed more than 35 investments in different portfolio companies and real estate assets.



BLACK CREEK GROUP

Black Creek Group is an innovative, hands-on real estate company with diverse product offerings, multi-channel distribution and a track record of creating value and producing long-term results for investors. We have numerous commercial real estate businesses and investment offerings, all which capitalize on our experience as real estate developers. Black Creek Group was formed in 1993 by our three founding partners, who have more than 75 combined years of real estate experience and decades of successful real estate investment value creation.



Brio Investimentos Imobiliários is a private real estate investment firm headquartered in São Paulo, Brazil. The firm focuses on opportunistic and value-added equity opportunities across all real estate asset classes. Brio was founded in 2012 by Grupo Jereissati, one of the largest Brazilian conglomerates with extensive experience in the real estate, retail, telecom, business outsourcing, and food sectors, and a group of real estate professionals who have raised and deployed over \$250 million the Brazilian real estate market in the last two years.



BTG Pactual is the leading Investment Bank in Latin America, with 30 years experience in Brazilian and international markets. With US\$87.1bn in funds under management and/or administration, the Asset Management area was voted the Best Fund Manager in Brazil by Exame magazine and Fundação Getúlio Vargas for two consecutive years. With US\$33.1bn in assets under management, the Wealth Management area was voted the "Best Private Banking Service in Brazil" by Euromoney magazine. 2,500 employees spread across 12 offices in Latin American countries (Brazil, Chile, Peru and Colombia), in addition to the US, the UK and China.

Bullrock

Bullrock is a Real Estate Fund focused on office, retail and hotel properties. The management team has more than 10 years of experience in development and investments. The fund strategy is focused on arbitrage; we believe the best turnover is selling and buying Prime Real Estate assets.

CAMPOS MELLO ADVOGADOS

Campos Mello Advogados is a business law firm operating throughout Brazil with the support of a team of experienced lawyers, specialized in different practice areas applied to several industry sectors. Partnering with clients in facilitating business is how we translate the commitment we have with our clients in helping them reach their business objectives.

SPONSORS



Grupo Caral is a Peruvian company dedicated to the construction of real estate projects with innovative, modern and functional design. Our philosophy has led us to build unique projects, designed to be the new homes of modern families that can last over time. In Grupo Caral we know and internalize that the purchase of a property is one of the most important decisions in the life of our customers, so we provide the best pre and post-sale service, with the necessary advice throughout the process of their new purchase.



A leading international law firm with 16 offices located in major financial centers around the world, **Cleary Gottlieb Steen & Hamilton LLP** has helped shape the globalization of the legal profession for more than 65 years. Our worldwide practice has a proven track record for innovation and providing work of the highest quality to meet the needs of our domestic and international clients. In recognition of the firm's strong global practice, its effectiveness in dealing with the different business cultures of the countries in which it operates, and its success in multiple jurisdictions, Cleary Gottlieb received Chambers & Partners' inaugural International Law Firm of the Year award.



Correal leads the market in Colombia for brokerage and financial advisory services. The company has more than 25 years of experience and a long trajectory in the market; as such, it has earned its place as one of the country's main brokerage firms. Correal was founded by a group of private investors to provide comprehensive stock exchange services to satisfy the financial needs of a select group of clients.



CRES is a real estate company that offers services and solutions to developers, investors and property owners with a comprehensive and current Real Estate market, being a leader in Operations Management Consulting, Project Management, Property and Facility Management, Appraisals and Valuations. CRES has specialized in representing corporate clients throughout Peru, as well as the development of a personalized service with a local portfolio.



DIASE is the largest Brazilian engineering company specialized in Tilt-Up technology. With more than 4 million sqm delivered, DIASE provides complete solution on industrial facilities, warehouses and retail construction. We offer to our clients a full domain of involved subjects, application of value engineering concepts, feasibility studies, obtaining permits and all kind of needs involved in a Real Estate Development process. DIASE is an active member of Green Building Council Brazil and "USA Tilt-Up Concrete Association" (TCA). We credit our success results from the application of principles such as Technology, Capability, and Sustainability. DIASE is strongly oriented to Sustainability, an important part of our working process, making easier obtaining "Environmental Quality Certificates" issued by recognized international councils such as, LEED and HQE.



DLA Piper, In the United States, has about 1,500 lawyers in offices in more than 20 offices located in every major business center across the country. Our core US practices are corporate and finance; intellectual property; litigation; government affairs; real estate; and tax. We represent many of the world's leading companies, including multinational, Global 1000 and Fortune 50 enterprises in a wide range of industries, as well as emerging businesses, banks and other financial institutions and professional firms.



GTIS Partners is a global real estate investment firm headquartered in New York with an office in Los Angeles, CA and São Paulo, Brazil. GTIS Partners was founded in 2005 and is managed by President Tom Shapiro and Senior Managing Directors Josh Pristaw, Rob Vahradian, Bill Cisneros and Joao Teixeira. GTIS Partners has 63 employees and currently manages approximately \$2.4 billion of committed equity. The firm pursues opportunistic real estate investments through direct equity investment and non-traditional lending activities. To date, the firm has committed capital to residential, retail, industrial, office, hotel and mixed-use projects in the U.S. and Brazil private equity companies in Brazil.

SPONSORS



InDev Capital, a pioneer in the emerging market real estate advisory business, specializes in matching global institutional capital with top-tier emerging-market developers. InDev Capital's advisory team has significant execution experience with more than \$9 billion in capital raised and 20 U.S. REIT IPOs since 1990. InDev has partnered with JPP Capital, a real estate-focused financial services firm in Brazil that offers its clients innovative solutions in structured finance, real estate investments and asset management. Together, along with one of the world's largest sovereign wealth funds, the firms recently closed on a \$135 million investment program focused on urban infill residential real estate in Sao Paulo.



ITM is a Mexican leading group based in the Riviera Maya with 30 years of experience in developing businesses in many fields. ITM creates and operates with success a large range of businesses such as an important tourist complex for international cruises, an exclusive hotel in the hotel Zone of Cancun and several real estate companies, creating, building, developing and retail selling unique developments in the Riviera Maya at a few minutes of Cancun and Playa del Carmen. The Real Estate branch comprehends several companies, each one focused on different market segments, from developing and commercializing a luxury tower of apartments in the island of Cozumel, high value added residential lots in Puerto Morelos to a large housing complex of more than 7000 units. The philosophy of ITM is building and selling high quality products at affordable prices.

Jamestown Latin America is led by an experienced team of professionals who, working together, have been at the vanguard of institutional real estate investment in Latin America for over a decade. The management team has extensive experience in all aspects of real estate investment and management across the region. Jamestown Latin America's operations are managed from its offices in Rio de Janeiro, Bogotá, Atlanta and New York. Jamestown Latin America's target markets include metropolitan areas in Brazil, Colombia and Peru that are characterized by sound real estate fundamentals and prospects for long-term economic growth. Within these markets, Jamestown Latin America forms joint ventures with local partners who hold direct product experience and proven market expertise.



Kern Industrial was founded in April 2010, and since then it has been conquering and creating loyal customers in the automotive segment, metallurgical, mining and infrastructure by providing quality services that excel in technical competence. We value ethics in relationships, in compliance contracts; we respect our partners, suppliers, the tax laws, environment and work safety.



Lares Desarrollos is a joint venture between Gestar Inmobiliaria and Zeller Realty Group exclusively focused on developing quality residential communities for the middle class in Mexico, with a track record that spans well beyond 25 years. Through its affiliates, Lares has completed development projects valued in excess of USD\$500mm across three states. Lares' investment professionals work closely with our operating group to capitalize on market dislocations which translates into a strong track record of consistently delivering attractive risk adjusted returns. Our commitment to our clients, our products and best practices translates into a disciplined approach to investing.



Founded In 1972, **Machado, Meyer, Sendacz e Opice Advogados** is a leading provider of legal services in Brazil. The full-service firm covers a large spectrum of legal matters, for both international and national companies, public institutions and investors of all sort of business. The main goal of Machado Meyer is to provide legal services of the highest caliber to its clients, helping them to find solutions to their problems and to strategically organize their business in a practical and advantageous way.

SPONSORS



Founded in 1995, **Paladin Realty Partners** is a leading institutional real estate fund manager focused on Latin America. For more than 15 years, Paladin Realty has been an active real estate investor in Brazil and other Latin America countries, including Mexico, Colombia, Peru, Chile, Costa Rica and Uruguay. To date, the firm has invested in the development of more than 25,000 residential units, commercial properties, and select opportunistic situations in the region, totaling over US\$5 billion of projected total cost. Paladin Realty is a registered investment advisor headquartered in Los Angeles, California, with offices located in Brazil, Mexico, Colombia, Argentina and New Jersey.



RB Capital is an independent company that develops innovative solutions in the capital markets. RB Capital originates, structures and distributes structured credit transactions and commits the necessary capital for the development of businesses based on real estate and infrastructure assets. RB Capital also acts as manager of Real Estate Investment, Credit and Infrastructure funds with an independent structure and team. While developing and delivering innovative and efficient solutions, RB Capital generates benefits to clients, investors, shareholders and employees, and contributes towards the development of the Brazilian capital markets. RB Capital's management is comprised of experienced professionals with complementary skills and knowledge, most of whom working as a team in the financial market for approximately 20 years.



Since 1975, **Ritch Mueller** has actively participated in the development and growth of Mexico's financial and securities markets and is regarded as having played a significant role in the financing of Mexico's private and public sector needs. Ritch Mueller is a multidisciplinary firm considered to be a market leader in each of its practice areas.



Southern Bridge Capital is a leading Latin American based residential real estate company that has raised over \$280 million of committed capital. Through its private equity funds, the firm develops residential communities via JV platforms established with local best-in-class developers. Since SBC's inception, the firm has invested in over 32 projects representing over 47,000 residential units with a development value of US\$3.2 billion. This also includes commercial/retail opportunities developed within its residential projects. SBC's current target countries are Colombia, Peru, Panama and the Dominican Republic with offices located in each country.



Shearman & Sterling's full-service Investment Funds team offers a range of services relating to Latin American investment funds and investors, and we maintain a diverse and sophisticated real estate funds practice throughout the region. We regularly advise on fund formation, tax planning, co-investment structuring, property acquisitions and dispositions, financing and leasing transactions, REIT offerings and internal sponsor arrangements. Shearman & Sterling has been a leading international law firm in Latin America for more than a century, and has played an active role in the economic development of the region. Opened in 2004, our São Paulo office has a well-established foreign law practice.



TISHMAN SPEYER

Tishman Speyer is one of the leading developers, owners, operators, and asset managers of first class real estate worldwide. Active across North America, Europe, South America and Asia, Tishman Speyer is relied upon by many of the world's most prestigious corporations to meet their office space needs. As of December 31st, 2012, the firm had acquired, developed and/or managed a portfolio of over 123 million sq. ft. with a total value of over USD \$63.6 billion since its founding in 1978.

SPONSORS



Thor Urbana Capital is a real estate investment and development company based in Mexico City aimed to capitalize on Mexico's strong economic growth and real estate fundamentals. The company creates value for its investors through the sourcing, acquiring, developing, repositioning, leasing, managing, and disposing of uniquely located, under performing or vacant retail, office and mixed-use assets in Mexico's principal urban markets. The depth and reach of the company's sponsors and executive team, with relationships developed over decades of active real estate development and investment throughout Mexico and the US, uniquely positions Thor Urbana Capital in the opportunistic and value-add commercial real estate arena.



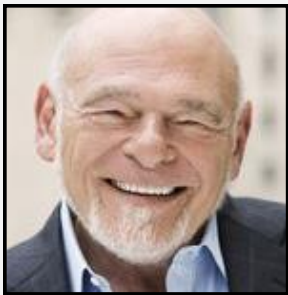
Vertex Real Estate Investors (www.vertexre.com) is a Mexico based private equity fund that invests in Mexican real estate. Its partners have 84 years of combined experience and more than 100 real estate transactions that exceed USD \$6.8bn which include deals in Hotels, Retail, Office, Industrial and Residential. In 2011, Vertex raised Fund of ~USD\$130MM USD, of which 100% is already committed. Its main investors are some of the largest Mexican Pension Funds and Insurance Companies. Currently, Vertex is raising a ~\$250-\$300 MM USD Fund with a first closing expected in 2015.

KEYNOTE SPEAKERS



John M. Angelo, Co-Founder and Chief Executive Officer, Angelo, Gordon & Co. (U.S.)

John Angelo is the co-founder and Chief Executive Officer of Angelo, Gordon. He manages the firm's growth and is focused on its strategic direction. A pioneer in the management of distressed securities and convertible arbitrage funds, John began his finance career in 1966 working on the bond floor of the New York Stock Exchange. He was associated with L.F. Rothschild for 18 years where he managed the firm's proprietary capital in world markets with particular emphasis on convertible securities, options, futures and distressed securities. John became a partner in 1975, and Vice Chairman and a member of the board of directors of the public company in 1985.



Sam Zell, Chairman, Equity Group Investments (U.S.)

Sam Zell is chairman of Equity Group Investments (EGI), the private, entrepreneurial investment firm he founded more than 40 years ago. Zell's investments span industries and continents, and include interests in finance, energy, transportation, communications, and real estate. He is recognized as a founding father of today's public real estate industry after creating three of the largest real estate investment trusts (REITs) in history. Zell is also co-founder and chairman of Equity International, a private investment firm focused on real estate-related companies outside the U.S. He has been particularly active in bringing Equity International's companies to the public market.



Thomas Wels, Head of Global Real Estate, UBS (Switzerland)

Thomas Wels is Head of Global Real Estate at UBS Global Asset Management, responsible for the leadership of the businesses investing in direct real estate, unlisted funds, listed real estate securities as well as multi manager solutions globally. He is a member of the UBS Global Asset Management Executive Committee and he chairs the Global Real Estate Management Committee. Thomas joined UBS Global Asset Management in 2005 and was Chief Operating Officer from 2010 to 2012 with overall responsibility for a number of business support functions. He has also headed the global Fund Services business, where he led its integration and further expansion, and been Global Head of Strategic Planning with responsibility for driving forward strategic business initiatives. He was appointed to his current role in December 2012.



Denise Nappier, State Treasurer, State of Connecticut (U.S.)

Denise Lynn Nappier is the first African-American woman elected to serve as a State Treasurer in the United States and the first African-American woman elected to a statewide office in Connecticut. Elected in 1998 and re-elected in 2002, 2006, 2010 and 2014, Treasurer Nappier is also the only woman to be elected Treasurer in Connecticut history. As Connecticut's chief elected financial officer, Nappier oversees \$54 billion in state funds, including the \$29.4 billion Connecticut Retirement Plans and Trust Funds. Her high standards and financial expertise have brought integrity back to the Treasurer's office and professionalism to the management of state resources. The Treasury's Short-Term Investment Fund has been rated as one of the nation's best government investment pools, and the Fund's superior performance has earned the local governments and their taxpayers an additional \$189 million during the Nappier Administration.

SPEAKERS



Adam Gallistel, Senior Vice President of Investments, GIC (Singapore)

Adam Gallistel joined GIC RE in 2004. He is a Senior Vice President of Investments based in New York. His primary responsibilities include overseeing GIC RE's investments in Brazil and the company's US lodging and leisure investments. Adam has worked on a broad array of investments at GIC including equity JV's, debt purchases / originations, LBO's, restructurings, and funds. His geographical experience includes the US, Brazil, and Mexico. His investment activities have spanned all real estate asset classes including office, industrial, retail, hotel and residential. Prior to GIC, Adam worked for LaSalle Investment Management



Jérôme Foulon, Managing Director—Real Estate, PSP Investments (Canada)

Mr. Foulon is currently the Managing Director, Real Estate Investments at PSP Investments where he is responsible for real estate investments and asset management. He is primarily responsible for the US, Latin America, and the Australian markets. For the past 15 years, Mr. Foulon has been active in the real estate industry worldwide and involved in more than \$6 billion of transactions for numerous types from simple real estate acquisitions to complex recapitalization or privatization. Prior to joining PSP in 2004, he worked as a Real Estate Portfolio Manager for Cadim (Ivanhoe Cambridge - Caisse de Dépôt et Placements du Québec). Mr. Foulon holds a Bachelor's degree in commerce (1996) and a M.Sc. degree in economics from HEC in Montreal. He also obtained his Chartered Financial Analyst (CFA) designation in 2003.



Bruce Graham, Vice President, CAPTRUST Advisors (U.S.)

Bruce joined CAPTRUST in 2013 as vice president, financial advisor and is responsible for providing retirement plan advisory services to corporate fiduciaries, as well as comprehensive wealth management services to high-net-worth investors, private foundations, corporate executives, and business owners. Prior to joining the firm, Bruce served as senior managing director with Clearbrook Global and has worked in the industry since 1981.



Ione S.V. Wilsmann, Head of Real Estate Investments, United States Steel and Carnegie Pension Fund (U.S.)

Ms. Ione S.V. Wilsmann is the Head of Real Estate Investments at U.S. Steel & Carnegie Pension Fund Inc. Ms. Wilsmann oversees property investment activity and portfolio management at the firm. Previously, she was a Partner at Quilvest Private Equity Ltd. Ms. Wilsmann was responsible for direct investments and co-investments in real estate in Americas. Before departing firm at the end of 2013, she helped to establish a new real estate platform that pursued both fund of funds and direct investment strategies. Before joining Quilvest in June 2008, she served as the Head of New Business Development of MetLife for six years in the real estate group.



Rosalie Wolf, Managing Partner, Botanica Capital Partners (U.S.)

Rosalie Wolf is managing partner of Botanica Capital Partners LLC, an investment consulting firm. Prior to January 2004, she was a managing director of Offit Hall Capital Management LLC, a wealth management practice. A member of the Offit Hall Investment Committee, she headed the firm's \$1.5 billion private equity business, and launched and managed the Offit Hall private equity fund, the firm's first private equity fund of funds. From 1994-2000, Ms. Wolf was treasurer and chief investment officer of The Rockefeller Foundation, where she directed investment of the foundation's \$3.8 billion endowment. Earlier, she held positions in corporate finance and investments at Bankers Trust Company, where she co-headed private equity investments.



Suzanne Etcheverry, Director—Funds Portfolio Management, OPIC (U.S.)

Ms. Etcheverry is a Director in the Investment Funds Department, where she identifies, executes, manages, and monitors the performance of OPIC investments in emerging markets private equity funds. Ms. Etcheverry works with a number of funds in Latin America and Russia that focus on real estate, general growth and expansion, and renewable energy and resources. Ms. Etcheverry joined OPIC in 2001. Prior to joining the Investment Funds group, Ms. Etcheverry served as a director in OPIC's political risk insurance department. In this position, she underwrote private sector transactions in emerging markets in a wide range of industries.



Matt DenBleyker, Senior Research Director, LT&A (U.S.)

Matt DenBleyker is currently the Senior Research Director for Larry Thompson & Associates, Inc., an investment consulting firm based in Dallas, Texas that primarily advises endowment, foundation and family office clients. He is responsible for overseeing the traditional and alternative investment research process, including manager sourcing, due diligence, portfolio construction and asset allocation modeling for the firm's institutional client portfolios. Prior to joining LT&A, Matt had over 14 years of institutional investment experience which included working at the Teacher Retirement System of Texas in Austin. He also worked overseas in the Asian financial markets where he held positions as vice president of hedge fund prime broking at Man Hong Kong and head of QFII research sales for Yuanta Securities.



Juan Daniel Frías, Investment Manager, Old Mutual (Colombia)

Mr. Frías is investment manager at Old Mutual Colombia, responsible for more than USD 7 billion in assets under management, across equity and fixed income, both local and foreign, and Private Equity Funds. Before joining Old Mutual, Juan Daniel worked in the FX Desks of Colombian banks and brokers, both in the spot and derivatives markets. Juan Daniel is a university teacher and he has written some articles in Colombian newspapers and magazines.

SPEAKERS



Paul Vosper, Co-Head, Morgan Stanley Alternative Investment Partners (US)

Paul is the Chief Operating Officer and co-head of the Morgan Stanley Alternative Investment Partners Real Estate Fund group and is a member of the real estate investment committee. Paul originally joined Morgan Stanley in 2000 and has 21 years of relevant industry experience. He has acted as the European General Counsel for Morgan Stanley Real Estate Funds, the European Chief Operations Officer for Morgan Stanley Real Estate and EMEA co-head of Morgan Stanley Real Estate Private Capital Markets Group. Outside Morgan Stanley, Paul was the head of client relations for EMEA at Deutsche Bank RREEF Real Estate.



Guillermo de Leon, Managing Director, Blue Line Investment Group (U.S.)

Guillermo de Leon, Managing Director. Guillermo was most recently Director of Investments and Portfolio Manager at Salient Partners, L.P., a multi-billion dollar investment management firm. During his tenure, he had oversight of investment and operational aspects of client investment portfolios including a multi-billion dollar U.S. pension plan. His responsibilities included investment policy review and development, strategic asset allocation implementation, portfolio risk monitoring, investment manager oversight across traditional and non-traditional asset classes.



Scott Stone, Chief Investment Officer, Pentegra Retirement Services (U.S.)

Scott Stone serves as the Chief Investment Officer at Pentegra, where he and his team are responsible for the management and oversight of the investment processes governing approximately \$8 billion in assets, comprised of both public and private holdings of fixed income, equity, real estate, hedge fund and other alternative investments. As Chief Investment Officer, he is responsible for developing short-term and long-term investment policies and managing and monitoring investment activity for the organizations varied investment platforms. Scott has spent much of his career working in insurance investment management investing under Asset-Liability Management (ALM) programs, and more than 25 years investing pension assets.



Gustavo Galindo, Senior Portfolio Manager, Russell Investments (U.S.)

Gustavo Galindo is a senior research analyst for Russell Investments' emerging markets equity research team. Based in New York, Gustavo's primary responsibility is to participate with the global and emerging markets team to evaluate investment processes and identify emerging markets money managers with high potential for superior returns going forward over a full market cycle. His investment recommendations are utilized by Russell clients around the world and by portfolio managers of Russell's growing multi-manager business.



Michael Blank, Managing Director, Andbank Miami (US)

Mr. Blank is the Managing Director of Andbank, Miami as of January 1, 2014. Andbank is the largest family owned private bank in Andorra. He was previously the founder of Swiss Asset Advisors, a multi family office located in Zug and Miami. He has been an International private banker for the past 23 years, during which time he established Bank Julius Baer in Palm Beach and Credit Suisse Private Advisors in Miami, Florida. Michael remains active in advising private clients, corporations and institutions with wealth preservation planning. He is a member of the Florida Bar, Society of Trust and Estate Professionals (STEP), and Florida International Bankers Association (FIBA).



Alena Kuprevich, Managing Director, Disciplina Group (U.S.)

Alena J. Kuprevich joined Disciplina Group as Managing Director in November 2013. Alena previously held the position of Managing Director of Private Investments at Vanderbilt University's Office of Investments where she was responsible for building a portfolio of private investments in private equity, venture capital, natural resources and real estate. These investments accounted for approximately 40% of the \$4 billion endowment portfolio. As a key member of the investment office responsible for sourcing, assessment and oversight of all private market related investments within the endowment portfolio, Alena successfully built a concentrated and global portfolio.



Luis Trevino, Managing Director, Beamonte Investments (U.S.)

Mr. Trevino is Senior Managing Director of Beamonte Investments and head of the private equity arm, Beamonte Capital Partners, which focuses on Latin American opportunities. Mr. Trevino is also current President of Beamonte Mexico Holdings (BMXH) a diversified holding company that targets private and public investments in Mexico. Mr. Trevino sits as member of the Board of Directors of CITEC ING, a Mexico City-based company specializing in pharmaceutical services and Integra Arrenda, one of the largest auto financing companies in Mexico. He is also Chairman of the Executive Committee of Kiwii Capital, a firm that specializes in asset-based lending to medium-sized enterprises, creating innovative credit products designed to serve borrowers' working capital.



Leonardo Wengrover, Managing Partner, W Advisors (Brazil)

Leonardo founded W Advisors, a Multi Family Office serving 10 families in the South of Brazil in 2005. Leonardo is responsible for advising his customers in the process of Private Wealth Management and Family Governance. Leonardo has regularly attended Family Office conferences as speaker and chairman and taught courses on the subject in-company and at the Brazilian Institute of Corporate Governance – of whose Southern Chapter he is also a member of the coordination committee. He graduated as a civil engineer and later pursued an MBA in finance. Before that, Leonardo was in charge of establishing and developing Wealth Management Offices for three different international banks in Southern Brazil.

SPEAKERS



Robert Lang, Managing Director, Cambridge Associates (U.S.)

He is responsible for performing due diligence on managers in the hard asset universe, including real estate, mining, energy, commodities, and infrastructure. Prior to becoming a research consultant in 2005, he was a member of the firm's general research team. Prior to joining Cambridge Associates, Bob worked as a journalist in Phnom Penh, Cambodia. Previously, he worked at Moody's Investors Service in New York, the U.S. State Department in China, the Lippo Bank in Indonesia, and the Philadelphia Stock Exchange.



Michael Felman, President, MSF Capital Advisors (U.S.)

Michael Felman is President and CEO of MSF Capital Advisors, a global multi-family office. His firm represents family offices and a select group of high net worth individuals. With a combined 40 years of financial and legal experience, MSF Capital Advisors has the knowledge and expertise to help families deal with issues such as direct investments, wealth preservation, asset allocation, tax planning, business succession etc. Mr. Felman received his B.A. from Clark University and J.D. from Pace University. Winner of Acquisition International 2013, 2014 Global Multi-Family Office award. Winner of Wealth & Finance International 2014 Global Multi-Family Office Award. A member of the NYU Stern and Princeton Family Office Councils. He is a frequent speaker at family office, hedge fund and emerging markets events.



Jorge Lopez, Director of Administration and Treasury, FIBRA Shop (Mexico)

Jorge López de Cárdenas graduated from Public Accountancy and Master in Finance at the Autonomous Technological Institute of Mexico (ITAM). Between 1997 and 2008, he held various positions at the National Banking and Securities Commission (CNBV), finalizing his career as regulator being the Head of Mutual Funds and Asset Management division. From 2009 to 2013, he served as the Chief Financial and Credit Officer at the National Institute Fund for Workers Consumption (FONACOT). He is currently the Director of Administration and Treasury at FibraShop.



Adriana de Alcantara, Senior Director, TIAA-CREF (US)

Adriana de Alcantara is a Senior Director and member of the Strategic Joint Ventures Team based in New York. She joined TIAA-CREF in London in 2009 as Head of Asset Management for the Continent Portfolio. Prior to joining TIAA-CREF, she was a Vice President at Lehman Brothers Global Real Estate and Vice President at O'Connor Capital Partners. She started her career in Luxembourg as a Portfolio Manager for HNWII at a subsidiary of Bank Degroof Luxembourg. Ms De Alcantara holds a B.B.A. in economics from UIC Barcelona and the European designation for Chartered Financial Analyst. Ms De Alcantara is fluent in English, Spanish, Portuguese, French and German.



Jorge Martínez, Head of Real Estate Investments, Monterrey NY Life Insurance (Mexico)

Jorge Martínez Chávez is a native of Queretaro and has lived in Monterrey and Mexico City in the last 12 years. Since 2006, Jorge has been part of the investment management team for Seguros Monterrey New York Life and since 2010 he is the head of Real Estate Investments for the company in charged of the debt financing platform and more recently equity investments. Jorge worked in the past for GE in Monterrey and Kansas City Southern in Texas. Jorge received his Bachelor of Financial Management at the Tec de Monterrey and a Masters in Business Administration at Texas A&M in Texas.



Sean Ruhmann, Partner - Director of Real Assets Research, NEPC (U.S.)

Sean joined NEPC in 2010 and is involved in the Firm's real estate and real assets research and due diligence activities. Additionally, he provides consulting services for the non-traditional asset classes of various public, corporate, Taft-Hartley and Endowment/Foundation clients. Prior to joining NEPC, Sean worked at Goldman, Sachs & Co. where he was a Vice President in the Real Estate Investment Banking Group. At Goldman, Sean advised real estate focused clients on mergers, acquisitions, divestitures, restructurings, debt capital raises, and equity capital raises. He was also responsible for the execution, due diligence and sourcing of transactions. Prior to joining Goldman, Sean was an Associate at Banc of America Securities in the Real Estate and Lodging Investment Banking Group.



Alejo Czerwonko, Strategist—Chief Investment Office, UBS Wealth Management (U.S.)

Mr. Czerwonko is an investment strategist at the Chief Investment Office of UBS Wealth Management, where he contributes to the development of investment views on emerging markets across different asset classes and geographical regions. Prior to joining UBS, Alejo worked as a quantitative analyst at Moody's KMV and was a consultant for the Inter-American Development Bank. Alejo earned a Ph.D. in economics from Columbia University. He also holds degrees in economics and finance from Tilburg University and Universidad del CEMA. He has taught courses at Columbia Business School, Columbia College, and Universidad del CEMA.



Michael Oliver Weinberg, Chief Investment Strategist, Protégé Partners (U.S.)

For more than two decades Michael has invested directly at the security level and indirectly as an asset allocator in traditional and alternative asset classes. He is Chief Investment Strategist at Protege Partners, where he is a Senior Managing Director, and on the investment, risk and management committees. Michael is also an adjunct Associate Professor of Economics and Finance at Columbia Business School, where he teaches Institutional Investing: Alternatives in Pension Plans, an advanced MBA course that he created. Michael is an advisory board member for the NYU Stern Investment Management and Research Society, Woodlake Group and PeerIQ. He is a member of AIMA's Research and Education Committees and participant in Peter Peterson's Fiscal Summit.

AGENDA OUTLINE

- 8:00** **Registration and welcome coffee**
- 8:55** **Hosts' Welcome**
Andres Ortiz, Real Estate Group, **Latin Markets** (U.S.)
- 9:00** **Global Investor Keynote Interview**
John M. Angelo, Co-Founder and Chief Executive Officer, **Angelo, Gordon & Co.** (U.S.)
Interviewed by:
Robert J. Raymond, Partner, **Cleary Gottlieb Steen & Hamilton** (U.S.)
- 9:30** **Panel Session: Global Institutional Investors' Real Estate Manager Selection Process**
Global LPs discuss the criteria they use to perform due diligence on managers and the challenges that GPs may face in attracting international capital in the medium to long term.
Panelists:
Will Buividas, Treasurer & Chief Contract Negotiator, **Phoenix Law Enforcement Association** (U.S.)
Suzanne Etcheverry, Director—Funds Portfolio Management, **OPIC** (U.S.)
Adam Gallistel, Senior Vice President, **GIC** (Singapore)
Ione S.V. Wilsmann, Head of Real Estate Investments, **United States Steel and Carnegie Pension Fund** (U.S.)
Matt Halstead, Investment Manager, **Teacher Retirement System of Texas** (U.S.)
- 10:10** **Panel Session: Global Investors Real Estate Allocations**
Global Investors will address the importance of Real Estate in their portfolio. They will also discuss Emerging Markets' risks and high-yield opportunities, focusing on Latin America.
Panelists:
Duncan Osborne, Senior Vice President—Investments, **Cadillac Fairview** (Canada)
Adriana de Alcantara, Senior Director, **TIAA-CREF** (U.S.)
Ge' Overdevest, Director, **Atos Origin Pension Fund** (Netherlands)
Allison Yager, Global Head - Real Estate, **Mercer** (U.S.)
Jérôme Foulon, Managing Director—Real Estate, **PSP Investments** (Canada)
- 10:50** **Morning Networking Break** *Sponsored by:* 
- 11:20** **Regional Roundtable: Brazilian Real Estate Opportunities**
Brazilian managers and investors will analyze the expectations for the performance of the real estate market after the 2014 elections. Also, how are local GPs providing international investors with innovative opportunities? Are Brazilian investors more willing to invest into local real estate funds?
Moderator:
Ivandro Trevelim, Partner, **Campos Mello Advogados** (Brazil)
Panelists:
Vitor Senra, Managing Director, **Brio Investimentos Imobiliários** (Brazil)
Fred Gortner, Managing Director, **Paladin Realty Partners** (US)
Axel Chaves, Managing Director, **Jamestown Latin America** (Brazil)
Josh Pristaw, Senior Managing Director, **GTIS Partners** (U.S.)
Marcelo Michaluá, Managing Partner, **RB Capital** (Brazil)
Sergio Stein, Managing Director, **Kern** (Brazil)
- 12:20** **Regional Roundtable: Brazilian Real Estate Opportunities II**
A continuation of the opportunities offered by the Brazilian real estate market.
Moderator:
Maria Flavia Seabra Gemperli, Partner, **Machado Meyer** (Brazil)
Panelists:
Bruno Dias, Managing Director, **Diase Construtora** (Brazil)
Speaker, Investment & Financial Manager, **Pension** (Brazil)
Adriano Mantesso, CEO, **BTG Pactual Corporate Office Fund – BC Fund** (Brazil)
Joseph Williams, CEO & President, **InDev Capital** (Brazil)
Daniel Cherman, Senior Managing Director & Brazil Country Head, **Tishman Speyer** (Brazil)
- 1:05** **Networking Luncheon**

AGENDA OUTLINE

- 2:05 Global Multi-Manager Executive Roundtable**
Managers will explore the relative performance of allocations within the Americas and what the most important criteria are considered when going through the manager selection process.
Moderator:
Michael Oliver Weinberg, Chief Investment Strategist, **Protégé Partners** (U.S.)
Panelists:
Gustavo Galindo, Senior Portfolio Manager, **Russell Investments** (U.S.)
Paul Vosper, Co-Head, **Morgan Stanley Alternative Investment Partners** (U.S.)
Tyler Jones, Vice President – Private Real Estate, **Partners Group** (U.S.)
Kresten Dahl Juelner, Senior Partner, **Sparinvest Property Investors** (Denmark)
- 2:45 Regional Roundtable: Mexican Real Estate Opportunities**
Mexican managers and institutional investors will discuss the performance of different regional markets in Mexico. Are Mexican investors more willing to invest into local real estate funds? Do Fibras provide competition or opportunities?
Moderator:
Rodrigo Conesa Labastida, Head of Real Estate, **Ritch Mueller** (Mexico)
Panelists:
Juan Carlos Calderon, Chief Risk Officer, **Afore Invercap** (Mexico)
Jorge Lopez, Director of Administration and Treasury, **Fibra Shop** (Mexico)
Gerardo Miranda, Director, **ITM** (Mexico)
Santiago Vazquez, Principal, **Lares Desarrollos** (Mexico)
Adam Brenneman, Partner, **Cleary Gottlieb Steen & Hamilton** (U.S.)
- 3:25 Afternoon Networking Break** *Sponsored by:* 
- 3:50 Regional Roundtable: Mexican Real Estate Opportunities for Fund Managers**
Mexican managers will share the most interesting opportunities in the Mexican real estate market.
Moderator:
Manuel Rajunov, Partner, **DLA Piper** (Mexico)
Panelists:
Adrian Aguilera, Managing Director, **Vertex Real Estate Investors** (Mexico)
Bob Batting, Managing Director, **Black Creek Group** (U.S.)
Jorge Martinez Chávez, Head of Real Estate Investments, **Monterrey NY Life Insurance** (Mexico)
Jaime Fasja, Managing Partner, **Thor Urbana Capital** (Mexico)
- 4:30 Panel: Private Wealth Allocations Into Real Estate**
The emergence of growing economies and the middle class has increased the amount of private capital going into private equity real estate.
Panelists:
Alejo Czerwonko, Strategist—Chief Investment Office, **UBS Wealth Management** (U.S.)
Leonardo Wengrover, Managing Partner, **W Advisors** (Brazil)
Michael Blank, Managing Director, **Andbank Wealth Management** (U.S.)
Michael Felman, President, **MSF Capital Advisors** (U.S.)
Dan Farrell, Chairman & CEO, **Privos Capital** (U.S.)
- 5:10 Government LP Keynote Presentation:**
Denise Nappier, State Treasurer, **State of Connecticut** (U.S.)
- 5:30 Cocktail Reception**
- 6:30 End of Day One**

AGENDA OUTLINE

- 8:00 Registration and welcome coffee**
- 8:55 Hosts' Welcome**
Andres Ortiz, Real Estate Group, **Latin Markets** (U.S.)
- 9:00 Panel Session: Outsourced Chief Investment Officers**
Outsourced CIOs will address the subject of investing their clients' portfolios in a diversified manner. Is real estate being under-allocated at this moment and if so, will this change?
Moderator:
David Son, Partner, **Spruceview Capital Partners** (U.S.)
Panelists:
Alena Kuprevich, Managing Director, **Disciplina Group** (U.S.)
Scott Stone, Chief Investment Officer, **Pentegra Retirement Services** (U.S.)
Rosalie Wolf, Managing Partner, **Botanica Capital Partners** (U.S.)
Matt DenBleyker, Senior Research Director, **LT&A** (U.S.)
- 10:00 Global Investor Keynote Interview**
Sam Zell, Chairman, **Equity Group Investments** (U.S.)
- 11:00 Morning Networking Break**
- 11:30 Global Asset Manager Keynote Interview**
Thomas Wels, Head of Global Real Estate, **UBS** (Switzerland)
- 12:00 Regional Roundtable: Peru and Chile's Real Estate Opportunities**
The Chilean and Peruvian most active real estate players will discuss how the real market is shaping up for the short-term future.
Moderator:
Felipe Camet, CEO, **CRES** (Peru)
Panelists:
Steven Tiller, Co-Founder and Managing Partner, **Southern Bridge Capital** (U.S.)
Andrés Pacheco Rincón, Managing Director, **Correval** (Perú)
Eduardo Gutierrez, CEO, **Bullrock** (Chile)
Lizardo Miranda, Managing Director, **AC Capitales** (Peru)
Fernando de la Flor, Director, **Caral Edificaciones** (Peru)
- 12:45 Regional Roundtable: Colombian Real Estate Opportunities for Fund Managers**
Colombian managers and Investors will analyze the region's performance and opportunities available. Why has Colombia excelled in the few years? Will this growth continue to happen?
Panelists:
Andrés Pacheco Rincón, Managing Director, **Correval** (Colombia)
Eduardo Romero, Executive Director, **BTG Pactual** (Colombia)
Andrés Alvarado, Managing Director, **Abacus Real Estate** (Colombia)
Juan Daniel Frias, Investment Manager, **Old Mutual** (Colombia)
- 1:30 Networking Luncheon**
- 2:30 Investment Consultants and Advisors Roundtable**
Investment consultants will analyze the need have a clear strategy, both discretionary and non-discretionary, in regards to real estate investments. Is Latin America and the U.S. meeting expectations?
Panelists:
Guillermo de Leon, Managing Director, **Blue Line Investment Group** (U.S.)
Bruce Graham, Vice President, **CAPTRUST Advisors** (U.S.)
Gina Sanchez, Founder and Chairwoman, **Chantico Global** (U.S.)
Sean Ruhmann, Partner - Director of Real Assets Research, **NEPC** (U.S.)
Bob Lang, Managing Director, **Cambridge Associates** (U.S.)

AGENDA OUTLINE

3:15 Sector Spotlight: Hospitality

The most important hospitality groups and Hotels discuss the present and future of hospitality properties.

Moderator:

Lisa Brill, Partner, **Shearman & Sterling** (U.S.)

Panelists:

Ricardo Zúñiga, Managing Director, **Vertex Real Estate Investors** (Mexico)

Jaime Fasja, Managing Partner, **Thor Urbana Capital** (Mexico)

Josh Pristaw, Senior Managing Director, **GTIS Partners** (U.S.)

4:00 Panel: US Opportunities for Global and Local Investors

As investment regulations and mandates change, Latin American investors are beginning to look overseas for opportunities. US-based managers will discuss what opportunities are reappearing in the U.S. after the 2008 depression.

Panelists:

Michael Gordon, Head of Retirement, Insurance and Strategic Solutions, **BNY Mellon** (U.S.)

Ash Rajan, Principal, **One Lindsley Partners**, Chief Investment Strategist (ex) **Merrill Lynch** (U.S.)

Luis Trevino, Managing Director, **Beamonte Investments** (U.S.)

John Tsui, Managing Principal, **Peninsula House Family Office** (U.S.)

4:45 End of Conference

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