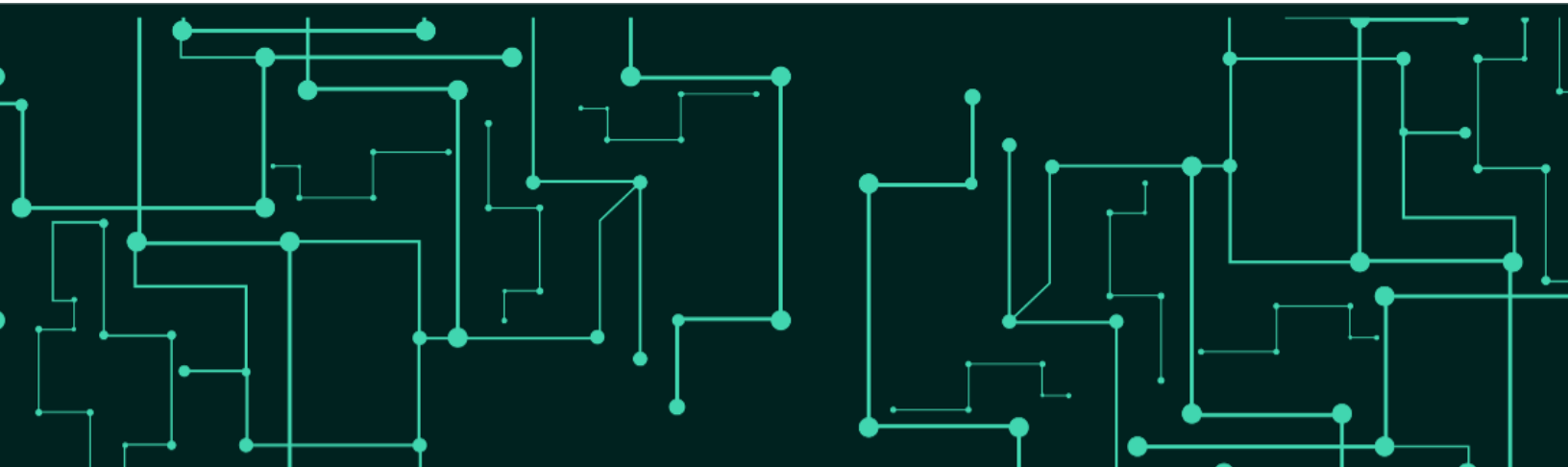




2022 MMI Alternative Investments Forum Agenda

**NOVEMBER 16
MORGAN STANLEY | NEW YORK, NY**

[#MMIAlternativeInvestments](#)





2022 MMI Alternative Investments Forum
Preliminary Agenda (subject to change)

Wednesday, November 16

8:30AM-9:00AM Registration and Networking Breakfast

9:00AM-9:15AM Welcome & Opening Remarks

Arlen Oransky, Executive Vice President, Chief Membership Officer,
Money Management Institute

Forum Co-Chairs:

Melissa Nordfors, Managing Director, Head of Alternative Investments
Platform Management, Bank of America

Sheila Rapple, Senior Managing Director, Global Head of Investor
Services, Private Wealth Solutions Group, Blackstone

9:15AM-10:00AM Fireside Chat: The Fourth Industrial Revolution
The Impact of Artificial Intelligence, 5G, Machine Learning, and
Other Disruptive Technology

Beijia Ma, Head of Equity Strategy, Alkeon Capital Management
Sheila Rapple, Senior Managing Director, Global Head of Investor
Services, Private Wealth Solutions Group, Blackstone

10:00AM-10:45AM Executive Spotlight

Alternatives Today: The Challenges and the Opportunities

Join us as key leaders in the alternative investments community share their viewpoints on both the opportunities and challenges the industry currently faces. Key discussion points will include the impact of market volatility on fundraising and portfolio construction, whether the flight toward liquidity is permanent or a trend, and if the real estate bubble is bursting. The panel will also look at the best opportunities in private markets today and the difficulties encountered in managing a workforce in the post-COVID environment.

Host:

Melissa Nordfors, Managing Director, Head of Alternative Investments
Platform Management, Bank of America

Panelists:

Stephanie Drescher, Partner, Chief Product and Client Development
Officer, Apollo Global Management

Jerry Pascucci, Managing Director, Head of Global Alternative
Investment Solutions, Global Wealth Management, UBS

Joan Solotar, Senior Managing Director, Global Head of Private Wealth
Solutions, Blackstone

10:45AM-11:00AM Networking & Refreshment Break



Preliminary Agenda (subject to change)

11:00AM-12:15PM

Sales Trends in the Alternatives Space

This session promises a spirited discussion about emerging sales trends in the alternative investments space. Panelists from CAIA, FUSE, and Stanger will present their assessments of market trends backed by compelling statistics and data. The session will include a Q&A segment with both live questions from the audience and ones submitted in advance. This discussion will be one of the most interactive of the Forum, so be sure to bring your own observations and join the conversation.

Moderator:

Parker Roy, Chief Revenue Officer, Axxes Capital

Panelists:

Aaron Filbeck, Managing Director, Head of UniFi by CAIA™, CAIA Association

Kevin Gannon, Chairman and CEO, Robert A. Stanger & Company

Patrick Newcomb, Director, Relationship Management, FUSE Research Network

12:15PM-1:15PM

Networking Luncheon

1:15PM-1:45PM

Regulatory Update: A Business Perspective

This quick-hit session focuses on key regulatory developments in the alternatives space that you must be on top of as a business leader. Topics include the status and practical impact of the Marketing Rule, the SEC focus on electronic communications, proposed revisions of NASAA REIT Guidelines, and secondary market liquidity for registered funds.

Christine Lombardo, Partner, Morgan Lewis & Bockius LLP

1:45PM-2:30PM

Modernizing Alternatives

This session looks at how technology – and advances in operational processes – are making client allocations to alternative investments simpler and more efficient. As the alternatives ecosystem has grown, the status quo operating model is constrained, but new tools and technology are enhancing the entire life cycle, allowing for a better client and advisor experience. Our panelists will discuss the new capabilities, applications, and technology designed to help financial advisors make high-quality alternative investments accessible to their clients.

Moderator:

Steve Houston, Managing Director, Head of Investment Products, iCapital

Panelists:

Rafay Farooqui, Founder and CEO, +SUBSCRIBE

Tom Fortin, Managing Partner, Chief Information Officer, iCapital

Christopher Shaw, Vice President, SS&C Technologies



Preliminary Agenda (subject to change)

2:30PM-3:15PM

Emerging AI Product Structures and Vehicle Types

Alternative investment product structures are evolving at a breakneck pace, primarily with a goal of including a broader investor base beyond ultra-high-net-worth and institutional investors. The result has been numerous launches of registered funds across private equity, private credit, and real estate. Bearing in mind the historical context, this session examines the product development trends over the last several years and the problems that continue to challenge asset managers.

Moderator:

Bill Golden, Managing Director, Head of Product Solutions, Voya Investment Management

Panelists:

James Hannigan, Managing Director, Client and Product Solutions, Apollo Global Management

Doug Krupa, Managing Director, Client and Partner Group, KKR

Daniel Maccarrone, Managing Director, Head of Alternatives Manager Due Diligence, Morgan Stanley

3:15PM-3:30PM

Networking & Refreshment Break

3:30PM-4:15PM

Driving Adoption: Lessons from the Institutional Perspective

Increased portfolio exposure to private markets has been a long-term trend in the institutional space but one that has been difficult to replicate for individual investors. This session looks at the historical hurdles that institutions faced and how they overcame them with data, portfolio construction/analytics, and education. Our panel will review what's been working, what hasn't, and share ideas to improve advisor and client engagement with the alternatives asset class.

Moderator:

Brad Walker, Chief Client and Product Development Officer, CAIS

Panelists:

Brian Holzer, Executive Director, Alternative Investment Sales, Morgan Stanley Wealth Management

Bryan Jenkins, Principal, Co-Head of Portfolio Management Group, Hamilton Lane

Neil Menard, President of Distribution, StepStone Group

4:15PM-4:20PM

Closing Remarks

Melissa Nordfors, Managing Director, Head of Alternative Investments Platform Management, Bank of America

Sheila Rapple, Senior Managing Director, Global Head of Investor Services, Private Wealth Solutions Group, Blackstone