

THE PRIVATE FUND CONFERENCE

INVESTMENT ADVISERS • 2021

SEPTEMBER 28-29, 2021
DENVER, COLORADO

AGENDA

TUESDAY, SEPTEMBER 28TH

- 11:00 a.m. Registration Opens
- 11:15 a.m. Rooftop Lunch
- 12:00 p.m. Opening General Session
Welcome
Keynote: *The Global Economy: Public and Private Investments*, Clint Sorenson, CFA, Co-Founder, WealthShield
- 1:15 p.m. Break
- 1:25 p.m. Breakout Sessions
A Legal Primer on Private Funds, Fay Matsukage, Senior Counsel, Doida Crow Legal
How To Whitelabel Strategies and Elevate Your Status With Clients, Steve Neamtz, President, Cboe Vest
- 1:55 p.m. Transition
- 2:05 p.m. Breakout Sessions
All You Need to Know About Hedge Funds, Ben Brown, Managing Director, StoneX
The 8 Steps to Setting Up Your Own Successful Private Fund, Nathan Crisenberry, COO, Alta Trust
- 2:35 p.m. EXHIBITOR BREAK
- 3:00 p.m. General Session
Keynote: *Impact Investing in Regenerative Medicine*, Mike Moradi, Co-Founder & Managing Director, R3 Bio
Keynote: *Trends and Opportunities in U.S. WealthTech, FinTech, and RegTech*, Rob Dearman, Chief Innovation Officer, DCG Insight
- 4:45 p.m. Pregame Reception
- 6:30 p.m. Rockies Game & Dinner

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WEDNESDAY, SEPTEMBER 29TH

- 7:00 a.m. Breakfast
- 8:00 a.m. General Session
Keynote: Netflix or Blockbuster, Which One Are You?, Mitch Lowe, Executive Co-Founder, Netflix
- 9:30 a.m. EXHIBITOR BREAK
- 10:00 a.m. Breakout Sessions
Finding Yield in Private Markets, Judd Kohn, Managing Director, White Wolf Capital, LLC
How To Help Your Clients Invest Like Billionaires, Timothy LeRoux, Director, Broyhill Asset Management
- 10:30 a.m. Transition
- 10:40 a.m. Breakout Sessions
Are There Tax Benefits to Private Funds?, Robert Velotta, CPA, Cohen & Company
The Many Uses Of Special Purpose Vehicles, Stephen Ponder, EVP, Alta Trust
- 11:15 a.m. Rooftop Lunch
- 12:15 p.m. General Session
Keynote: 15 Reasons A Private Fund Makes Sense For You and Your Clients, Camille Clemons and Robert Velotta, Cohen & Co
Panel Discussion: Making Private Investments Accessible, Michael Bell, Timothy LeRoux and Paul Barausky
- 1:40 p.m. Break
- 1:50 p.m. Breakout Sessions
A Conversation on Crypto, Clint Sorenson, Co-Founder, WealthShield and James Koutoulas, CEO, Typhon Capital
Creating Just The Right Pitch for Private Fund Investors, Audrey Howes, Founder, 27th Letter Media
- 2:20 p.m. Break
- 2:40 p.m. General Session
Keynote: Private Real Estate Investing For RIAs, Zach Wiegert, CEO, Goldenrod Companies
Keynote: Expand Your Vision. Expand Your Possibilities, Adam Ponder, CEO, Alta Trust Company & Managing Partner, Structure Private Equity
Closing Remarks
- 5:45 p.m. Leave for Dinner
- 6:00 p.m. Offsite Dinner

Agenda and speakers subject to change.

