



roundtable forumSM

The Highly Civilized Alternative to Capital Introduction . . .

We have a 19- year history of introducing managers to allocators in our signature, "roundtable", small group format. The 10-12 funds we feature are the sole focus of the Forum. There are no other funds, no exposition, limited sponsorship - no nonsense. Our formula for success is simple:

12 Funds | 75 Allocators | No Nonsense

- A bespoke opportunity for 10 -12 managers to meet 50 - 75 allocators:
 - Single & Multi-Family Offices
 - Fund-of-Funds
 - Registered Investment Advisors
 - Consultants
 - Endowments / Foundations
- Diverse strategies are presented by managers at all stages of development.
- Managers present to small groups of investors in our signature "roundtable" format:
 - Each manager hosts a 72" round table populated with allocators.
 - Each manager makes 4 consecutive 30-minute presentations to 4 different groups of allocators. Total speaking time is 120 minutes: [Format Demonstration](#)
- Networking opportunities during registration breakfast and lunch with no speaker.
- Fund information is provided to investors in advance of the Forum in print and online.
- Marketing personnel are welcome to accompany the manager at no additional charge.
- Managers receive full contact details for all attendees to facilitate follow-up.

The Value Proposition

- Save time! Meet a large number of allocators in 1 day minimizing out-of-office time.
- Save money! Eliminate costly travel and entertainment expenses. The allocators come to you.
- Low cost, non-recurring, capital acquisition – just a one-time participation fee.
- We position you for success by prepping you and your materials for the event.
- All you do is provide us with a fund profile. We do everything else!

References Available Upon Request

