



The Colony Hotel • Palm Beach • Wednesday, April 13th, 2022

- 9:00** **Registration & Continental Breakfast**
- 9:30** **Welcome and Introductory Remarks from Jane Amanda Halsey, Founder & President, Roundtable Forum, LLC**
- 10:00** **Roundtable Session I – Duration 120 minutes. 4 consecutive 30 minute rotations for a total of 4 manager meetings.**

 Oscar Anderson & Scott Bynum, **Mudrick Stressed Credit Fund**, New York, NY
Long biased, total return credit strategy focusing on senior secured securities of stressed corporate issuers

 Abraham Joseph, **Arosa Capital Management LP**, New York, NY
Long/Short Equity Alternative Energy Fund

 Andrew Rechtschaffen, **AREX Capital Management**, New York, NY
Highly concentrated, value-oriented long only fund

 Gregory Martinez, **Parkman Healthcare Partners**, Stamford, CT
Long/Short, Small to Mid-Cap Healthcare Focused

 Charles Carnegie, **Context Capital Management**, Greenwich, CT
Market-neutral, absolute return strategy focusing on convertible bonds, SPACs, and other capital structure opportunities



12:00 **Networking Luncheon Graciously Sponsored by**

1:00 **Roundtable Session II – Duration 120 minutes. 4 consecutive 30 minute rotations for a total of 4 manager meetings.**

- Jeremy Kahan, **North Peak Capital Management**, New York, NY
Long biased hedge fund taking a private equity approach to public markets, targeting companies that can triple over the next 5 years.
- Erik Miller, **Perspective Equity Partners**, New York, NY
Diverse lower middle market PE & Advisory Firm
- Steve Cramer & Mitch Miller, **BC2 Capital LLC**, Dallas, TX
Real Estate Co-GP Fund
- Elizabeth Sikorovsky, **FX Strategy**, Boston, MA
Uncorrelated Alpha with Daily Liquidity
- TBA Fund**
Strategy

3:00 **Bonus Discussion: the next hot topic you need to know about after medical cannabis: psychedelic medicines.**

Dean Porter & Cameron Adair, **Compos Mentis Medical**
A brief history of psychedelic medicines and what this means to the future treatment of mental health issues.

3:20 **Join us in the garden for The Colony’s signature Frosé and other refreshing drinks/beverages.**



4:00 **Roundtable Forum Concludes**



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