

Georgia Roundtable Forum

Hartwell, GA • June 16th-18th 2021



roundtable forum<sup>SM</sup>

June 17 – Catechee Golf Club Ballroom

9:00am: Registration & Light Continental Breakfast

9:30am: Welcome and Introductory Remarks from Jane Amanda Halsey, Founder & President, Roundtable Forum, LLC

9:45am: Keynote from Todd Petzel, Co-CIO & Chief Economist at Offit Capital, NYC – Allocator/manager communication. What works best in an effective partnership

10:30am

Roundtable Session I – Duration 90 minutes  
3 consecutive 30 minute presentations

Lucas Tomicki

**LRT Capital Management, LLC**

Long-Bias, Long-Term Value, Focused on Sustainable Competitive Advantages

Michelle Kelner

**Sandglass Capital Advisors, LLC**

EM investing: Event-driven investments in public & private securities, co.' and countries facing disruptive events, restructurings & turnarounds. Also partner with high growth co.'s building durable businesses benefiting from strong secular growth dynamics

Vas Sfyris

**Phorcys Opportunities I, LLC**

High-yield & distressed municipal credit strategy

12:15pm Luncheon in the Ballroom

1:30pm

Roundtable Session II – Duration 90 minutes

3 consecutive 30 minute presentations

Geoff Stern

**North Haven Partners LP**

Market neutral fund seeking to generate alpha thru arbitrage and basis trading of digital currencies and assets

Dave Treitel

**Zephyrus Aviation Partners II Fund**

High Yielding Mid-Life Commercial Aircraft Leasing

Quick Break for Refreshments, Restroom, etc.

Jim Dunn, Chief Executive Officer

**Verger Capital Management**

Ignore ESG at your own risk, what manager and investors are doing to respond to more calls for sustainable, inclusive and impactful investment results

4:15pm Wrap-Up Panel with Moderator Jim Dunn – All speakers will participate in the panel with investor opportunity for Q&A.

5:00pm Cocktails Followed by Dinner

Friday, June 18th

Golf outing at Cateechee Golf Club (Format TBD)

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