

## Old Parkland - Pecan Room • Dallas • Wednesday, May 24th, 2023

**8:30** Registration & Continental Breakfast

**8:45** Welcome and Introductory Remarks from Jane Amanda Halsey, Founder & President, Roundtable Forum, LLC

**9:00** Roundtable Session I – Duration 120 minutes. 4 consecutive 30 minute rotations for a total of 4 manager meetings.

Jeff Peskind, **JLP Balanced Alpha Fund**, New York, NY

*A hedged credit-focused strategy whose goal is to have no down-months while providing low double-digit returns*

Evan Goldschneider & Allen Sukholitsky, **Masterworks Diversified Art Portfolio**, New York, NY

*Navigating volatility - uncorrelated strategy with art*

Peter Habermacher, **Aaro Distributed Ledger Technology Multifund IC SICAV, p.l.c.**, London, UK

*Access to cryptoassets & distributed ledger technology space through well resourced, institutional quality fund of funds*

Scott McWhorter & Duncan Hatch, **Virtú Investments Evergreen Fund, LP**, Larkspur, CA

*Multifamily real estate focused on the western United States*

**11:00** Refreshment & Snack Break

**11:30** Roundtable Session II – Duration 120 minutes. 4 consecutive 30 minute rotations for a total of 4 manager meetings.

Bruce Eliot, **P/E Investments FX Strategy**, Boston, MA

*FX focused global macro / absolute return fund*

Jed Walsh, **Summit House Capital**, Dallas, TX

*Actively managed investment in first lien loans and bonds of small and mid-size companies across a variety of industry sectors*

Larsen Jensen, **Harpoon**, Coronado, CA

*Fund 3: early-stage venture capital in enterprise and deep tech (seed to Series B)*

Alex Brown, **Commerce Street Investment Management**, Dallas, TX

*Financial Institution focused investor that provides growth capital to community banks throughout the United States*

**1:30** Networking Luncheon

**2:30** Roundtable Forum Concludes



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