

## The Colony Hotel • Palm Beach • Wednesday, April 17th, 2024

**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.

Dan Gelernter, **R.G. Niederhoffer Capital Management**, Sunny Isles Beach, FL

- A lively discussion on the economic and social risks of AI and ChatGPT, and how they affect all aspects of our lives, including our investments.

Lachlan Campbell & Lachlan Beech, **Duxton Water Limited**, Stirling, Australia

- Provides direct and pure exposure to Australian water markets: a diversified portfolio of water entitlements. Through active management, generate a return by offering a range of water supply products to Australian farming businesses.

John Hardaway, **Triten Real Estate Partners**, Dallas & Houston, TX

- Vertically integrated real estate investment and development firm, diversified across multiple asset classes covering six US regions. Leverage data and innovation to identify mark-to-market arbitrage opportunities.

Clay Dunnagan, **Anchor Capital Management Company, LLC**, Raleigh, N.C.

- Concentrated investing in small cap U.S. companies with asymmetrical risk/return profiles.

Lane Murphy, **Mast Hill Fund**, Boston, MA

- Private Credit, Short Duration (1 year), Convertible Note Fund lending exclusively to public companies in the Small & Micro Cap space - NYSE and NASDAQ only - no bulletin board or OTC companies.

**12:00** Networking Luncheon

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

Jordan Allen, **Garrington Capital**, Chicago, IL & Toronto, Ontario, Canada

- Garrington Capital delivers alternative, transitional funding to small and medium sized businesses and specialty lenders in the U.S. and Canada: asset-based lending, lender financing, invoice factoring, equipment leasing/financing and specialty finance.

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

- FX focused global macro / absolute return fund

Rick Selvala, **Visdom Investment Group LLC**, Westport, CT

- Delta Lite (DLIT): index option overlay which seeks to add hedged incremental yield/returns to an existing portfolio. No capital commitment up front or allocation/diversion away from other investments (i.e., portable alpha with hedged equity like returns).

Sean Kelly-Rand, **RD Real Estate Debt Fund II LP**, Boston, MA

- Focusing on high-yield, short-term senior real estate debt on residential assets in the Greater Boston area.

Jeff Hinkle, **EJF Financial Debt Strategies Fund**, Washington D.C.

- Opportunistic private credit fund focused on balance sheet solutions for financial institutions.

**3:00** Roundtable Forum Concludes

Please join us poolside for cocktails and hors d'oeuvres.



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