



## Convene at 75 Rock Plaza • New York • Thursday, December 12th, 2024

- 8:00** Registration & Breakfast: Selection of Hot, Cold & Gluten Free Options
- 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.
- Kiva Patten, CFA, **Deer Park Commercial Mortgage Opportunity Fund I**, (CMOF), Steamboat Springs, CO  
- CMOF is a soon-to-launch closed-end fund that will seek to take advantage of the current and evolving opportunity in distressed Commercial Real Estate by participating in the \$700bn+ CMBS universe utilizing a unique, four-pillar approach.
- Al Tarar, Founder & Managing Partner & Rizwan Muhammad, Partner, **Quartus AI Fund**, New York, NY  
- Fund invests in growth-stage AI and technology ventures and scales them into market leaders of the future that drive innovation, performance and impact.
- Casey Gard, Managing Member, **GFO Asset Management LLC**, Miami Beach, FL  
- Capital appreciation through a diversified portfolio of litigation finance investments.
- Jeff Peskind, Founder & Chief Investment Officer, **JLP Balanced Alpha Fund**, New York, NY  
- A hedged credit-focused strategy, investing primarily in high-yield and high-grade corporate credits, whose goal is to have no down-months while providing high single to low double-digit returns.
- Eric Phillipps, Founder, **3P**, New York, NY  
- 3P is a technology-driven residential real estate platform focused on investment and development in desirable U.S. markets.
- 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.
- Jed Walsh, Founder & Chief Investment Officer, **Summit House Capital**, Dallas, TX  
- Opportunistic investment manager focused on performing middle-market corporate credit investments primarily within a stressed or event-driven context.
- Clay Dunnagan, Founder and Chief Investment Officer, **Anchor Capital Management Company, LLC**, Raleigh, NC  
- Concentrated investing in small cap U.S. companies with asymmetrical risk/return profiles.
- Richard Ranck, Managing Director, **SAFHarbor Opportunity Fund, LLC**, Daytona Beach, FL  
- Developing modern, fifth-generation climate-controlled multi-story self-storage throughout the U.S.
- Lane Murphy, Co-Founder & General Partner, **Mast Hill Fund**, Boston, MA  
- Private Credit, Short Duration (2 years), Convertible Note Fund lending exclusively to public companies in the Small & Micro Cap space - NYSE and NASDAQ only - no bulletin board or OTC companies.
- 1:30** Networking Luncheon Reception
- 2:30** Forum Concludes



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