



The Colony Hotel • Palm Beach • Thursday, April 24th, 2025

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.

Jason Lewis, **Greenlight Capital**, New York, NY

- A value-oriented investment management firm founded in May 1996 that primarily invests and trades in long and short publicly listed equity securities, as well as distressed debt when cyclically attractive.

Nick Breedlove, Tyler Brous & Max Korenvaes, **BBK Capital**, Dallas, TX

- A Critical Industries SBIC Fund. BBK Capital was chosen as the 1st fund by The U.S. DoD's Office of Strategic Capital (OSC) and the SBA to invest in American fund managers and companies operating in critical industries and technology sectors. In this new program, for every \$1 dollar BBK raises, the OSC and SBA matches/contributes \$2 dollars. This creates an incredible capital structure that yields 400 - 1000 basis points of spread on all returns.

Casey Gard, **GFO Asset Management LLC**, Miami Beach, FL

- Capital appreciation through a diversified portfolio of litigation finance investments.

Vadim Margulis, **Alignment Credit Fund III**, New York, NY

- Alignment Credit is a specialized private credit platform focused on direct lending to growth-stage and lower middle-market companies across the United States. With a clear emphasis on delivering capital solutions that support growth, liquidity, and transition, Alignment Credit has built a track record of successful investments through a disciplined and hands-on approach.

Jason Albanese, Joseph Kretzers, & Jock Percy, **Lightning Capital**, Miami, FL

- Our Multi Fund approach to Digital Asset Management is suited for wealth creation. US and Global investors participate alongside us to gain exposure to a growth driven asset class spanning the risk/reward spectrum. Our top-tier team of portfolio managers, analysts, developers and a deep understanding of blockchain and trading technology which results in a systemic edge when executing trades in global markets. Our funds focus on maximizing risk-adjusted returns while mitigating downside exposure. Our mission is to consistently rank in the top decile of global hedge funds.

12:00 Networking Luncheon

1:00 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.

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

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

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

- A 3.5 year-old hedged credit fund annualizing at +11.71% net with consistent monthly returns - one of the highest Sharpe and Sortino Ratios worldwide.

Daniel Fetner, **Alpaca Real Estate**, New York, NY

- Alpaca Real Estate leverages a tenured institutional investment team combined with Alpaca's pedigree in innovation to drive alpha in an opportunistic real estate strategy. We layer innovative operating platforms on top of traditional real estate to unlock asymmetric upside potential.

3:00 Roundtable Forum Concludes

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



Many thanks to our wonderful sponsors for their support . . .

