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Today's Featured Speakers

in order of appearance

**David Tegeler**

Partner, Private Funds

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David has over 30 years of experience in the private equity industry. He has represented numerous domestic and international private investment firms in their fund formation and operations, including buyout, growth equity, credit, venture capital, natural resource, special situation, secondary and funds of funds, as well as geographic and sector specific funds.

David is frequently recognized as a leader in the private equity field and is consistently ranked by national and global publications, including Chambers USA, Chambers Global, The Legal 500, The Best Lawyers in America, amongst others. David is a member of the firm's Community Engagement & Inclusion Task Force.

**Monica Arora**

Partner, Private Funds

Proskauer

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Monica Arora is a partner and co-head of the Private Funds Group at Proskauer.

Monica advises asset managers on the full spectrum of investment fund matters across a wide variety of strategies, including buyouts, credit, growth equity, energy transition, real assets and infrastructure funds.

Monica is a thought leader in the industry and is consistently ranked as a leading investment funds lawyer, including by Chambers USA and The Legal 500, and was named to The Deal's "Top Women in Dealmaking" list in 2023 and to Forbes' inaugural list of "America's Top 200 Lawyers" in 2024.

Today's Featured Speakers

**Josh Newville**

Partner, SEC Enforcement

Proskauer

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Joshua M. Newville is a partner in the Litigation Department and a member of Proskauer's Securities Litigation Group and the Asset Management Litigation team.

Josh handles securities litigation, enforcement and regulatory matters, representing corporations and senior executives in civil and criminal investigations. In addition, Josh advises registered investment advisers and private fund managers on regulatory compliance, SEC exams, MNPI/insider trading and related risks, and has substantial experience conducting internal investigations.

**Nathan Schuur**

Partner, Private Funds, Regulatory

Proskauer

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Nathan Schuur is a partner in the firm's Private Funds Group and a member of the Corporate Department. He counsels clients on regulatory and compliance matters related to fund formation across all asset classes.

Nate's practice focuses on regulatory issues arising under the Advisers Act and Investment Company Act. He advises on regulations surrounding the structuring and operation of funds, including marketing issues, SEC exams, adviser M&A, GP stake sales, continuation funds and stapled transactions. Nate provides legal advice and guidance on a wide range of matters involving the regulation of investment companies, investment advisers and related entities such as BDCs and ERAs.

Today's Featured Speakers

**Rob Sutton**

Partner, Private Funds, Regulatory
Proskauer

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Robert Sutton is a partner of the Private Funds Group and a member of the Corporate Department. He is a seasoned practitioner with over 20 years of experience counseling managers and advisers of private funds on regulatory matters as well as regulatory issues related to the formation and operation of private equity, credit, real estate, infrastructure, hedge and other private funds.

Rob has a deep knowledge of the market practice of asset managers and in particular, as it relates to Advisers Act-related issues. From some of the largest and most sophisticated firms in the global asset management industry to start-ups and mid-sized firms, Rob's experience includes a wide spectrum of funds and asset classes across their life cycles.

**Allan Bloom**

Partner, Labor & Employment
Proskauer

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Allan Bloom is the co-chair of Proskauer's Labor & Employment Law Department and a nationally recognized litigator and advisor who represents employers, business owners and management in a broad range of employment and labor law matters.

As a litigator, Allan has successfully defended many of the world's leading companies against claims for unpaid wages, employment discrimination, breach of contract and wrongful discharge, both at the trial and appellate court levels as well as in arbitration, before government agencies and in private negotiations. He has secured complete defense verdicts for clients in front of juries as well as injunctions to protect clients' confidential information and assets.

Today's Featured Speakers

**Evandro Gigante**

Partner, Labor & Employment
Proskauer

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Evandro is the go-to employment litigator and counselor when clients face their most challenging, bet the reputation claims or want to develop policies and practices that mitigate legal risk.

As an award-winning partner in the Labor & Employment Law Department, member of the Employment Litigation group and co-head of the Counseling, Training & Pay Equity group, Evandro represents clients on a variety of labor and employment matters, including allegations of sexual harassment, race, gender, national origin, disability and religious discrimination.

**Adam Lupion**

Partner, Labor & Employment
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Adam Lupion is the co-chair of the Labor & Employment Law Department and a member of the Labor Management Relations, Sports Law and Employment Litigation Groups. Widely recognized as a leading labor and employment attorney, Adam has been named a “Power Player” by *Sports Business Journal*, a “Top 50 L&E Litigator” and “Labor & Employment Star” by *Benchmark Litigation*, as well as numerous other accolades.

A trusted litigator and counselor, Adam has developed a particular expertise representing sports leagues and teams. He has been at the center of many of the most significant labor and employment matters in the sports industry.

Today's Featured Speakers

**Jennifer Dunn**

Partner, Private Funds,
Hedge Funds

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Jennifer focuses her practice on advising hedge funds, closed-end funds (including debt funds), hybrid funds, co-investment platforms and investment advisers in connection with their structuring, formation and ongoing operational needs, general securities laws matters and regulatory and compliance issues.

Jennifer has been named among the 50 Leading Women in Hedge Funds by *Hedge Fund Journal* and served on the board of directors of 100 Women in Finance. She has been recognized by Chambers USA, the Legal 500 US and has presented at conferences on ESG investing, compliance issues, co-investments, hedge funds and credit funds.

**Christine Harlow**

Partner, Private Funds, Tax
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Christine is a partner in the firm's Tax Department and a member of the Private Funds Group, advising clients on the tax aspects of private funds, including hedge funds, credit funds, private equity funds and joint ventures.

Christine represents private fund managers in the formation of private funds, ongoing operations and the tax consequences of purchasing and disposing of investments. She also represents investors regarding the tax consequences of investing in private funds. She advises fund managers and investors on a variety of fund structures, including closed-end, open-end, hybrid and evergreen.

Today's Featured Speakers

**Matthew Kerfoot**

Partner, Fund Finance

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Matthew K. Kerfoot is a partner in the Global Finance Group and focuses principally on fund finance and structured finance transactions. Matt has held leadership positions in both banking and law in the fund finance industry for over two decades. He is the chair of the PLI Fund Finance Conference, is a frequent speaker and author on various fund finance matters and has appeared in the Wall Street Journal, Financial Times and Bloomberg News, among other media outlets.

Matt's clients have included many of the most prominent global asset managers and financial institutions around the world, including Apollo, Ares, Blackstone, Goldman Sachs, KKR and Morgan Stanley.

**James Oussedik**

Partner, Private Funds

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James Oussedik is a partner in the firm's Corporate Department and a member of its Private Funds Group and Private Capital Team. James co-leads the Firm's global credit funds and sovereign wealth funds initiatives.

James advises a broad range of sponsors and investors, covering the establishment of all types of private funds, and advice to sovereign wealth funds, seed investors, pension funds, family offices and financial institutions across a range of private and public market strategies.

Today's Featured Speakers

**Jean Bertrand**

Partner, Private Funds, Tax
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Jean Bertrand is a partner in the Tax Department and a member of the Private Funds Group.

Jean counsels clients on a wide range of domestic and international tax matters. Her practice focuses on advising private investment funds, including credit funds, real estate funds, public and private REITs, hedge funds, and private equity funds on all aspects of their operations, including fund formation, tax planning, investment structuring and day-to-day operations.

**David Miller**

Partner, Private Funds, Tax
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David Miller is a partner in the Tax Department. David advises clients on a broad range of domestic and international corporate tax issues.

David's practice covers the taxation of financial instruments and derivatives, private and public REITs, cross-border lending transactions and other financings, international and domestic mergers and acquisitions, multinational corporate groups and partnerships, private equity and hedge funds, bankruptcy and workouts, high-net-worth individuals and families, and public charities and private foundations. He advises companies in virtually all major industries, including banking, finance, private equity, health care, life sciences, real estate, technology, consumer products, entertainment and energy.

Today's Featured Speakers

**Frazer Money**

Partner, Private Funds, Tax

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Frazer Money is a partner in the Tax Department and a member of the Private Funds Group.

Frazer advises businesses on a wide range of tax and structuring matters, with particular experience in advising asset managers on tax and structuring issues relating to their funds, management businesses, remuneration packages and investment transactions as well as GP and LP-led secondaries and GP minority transactions.

Frazer also has a wide range of experience advising on the tax aspects of complex credit transactions and cross-border restructurings.

**Corey Dietrich**

Partner, Secondary

Transactions and

Liquidity Solutions

Proskauer

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Corey is a partner in the Private Funds Group. He primarily focuses his practice on representing buyers and sellers, as well as private fund sponsors, in connection with complex secondary transactions, including traditional sales and purchases of fund interests as well as GP-Led transactions, including, but not limited to, single asset spin-out arrangements, fund recapitalizations, preferred financings and "stapled" secondary transactions.

In addition, Corey regularly represents U.S. and non-U.S. institutional investors in their primary investments and co-investment opportunities in private investment funds, including buyout, energy, credit, mezzanine, healthcare, real estate, venture capital, special situation and secondary funds, as well as separate and other managed accounts.

Today's Featured Speakers

**Blake Halperin**

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Blake Halperin is a partner in the Private Funds Group. He primarily focuses his practice on representing buyers and sellers, as well as private fund sponsors, in connection with complex secondary transactions, including traditional sales and purchases of fund interests as well as GP-Led transactions, including, but not limited to, single asset spin-out arrangements, fund recapitalizations, preferred financings and “stapled” secondary transactions.

In addition, Blake regularly represents U.S. and non-U.S. institutional investors in their primary investments and co-investment opportunities in private investment funds, including buyout, energy, credit, mezzanine, healthcare, real estate, venture capital, special situation and secondary funds, as well as separate and other managed accounts.

**James Powers**

Partner
Painswick Capital

James is a Partner at Painswick Capital. Painswick is a joint venture led by John Garcia in partnership with AEA Investors and was established to invest in the rapidly growing single-asset continuation vehicle market.

Prior to Painswick, James spent over 15 years at AEA Investors LP as an investment professional on the AEA Middle Market Private Equity team. James began his career at Bain Consulting in Boston. He received a Bachelor of Science (B.S.) degree in Economics from the Wharton School of the University of Pennsylvania in 2005.

Today's Featured Speakers



Stuart Tishman
Principal
Apollo S3

Mr. Tishman joined Apollo in 2022 in the Sponsor and Secondary Solutions (S3) group and is responsible for sourcing, underwriting and executing transactions. Prior to that time, Mr. Tishman was a Vice President in the Strategic Equity Group at Intermediate Capital Group (ICG) from March 2018 to March 2022. Prior to that time, Mr. Tishman was a Vice President in the Private Equity Group at Roundtable Investment Partners and as an Associate in the Principal Investing Group at Macquarie Bank.

Mr. Tishman is a founding member of the Young Adult Executive Board of Central Synagogue, Co-Chair of Development for Riverdale Country School's Alumni Association Executive Committee and a member of UJA's Next Generation Private Equity Division. Mr. Tishman graduated cum laude from the University of Pennsylvania with a BA degree in Economic History.



Andrew Topping
Principal
Churchill Asset Management

Andrew is a Principal at Churchill and a member of the Junior Capital & Private Equity Solutions investment team, focused on the firm's Secondaries strategy. In his role, he is focused on sourcing, underwriting and executing secondary investments as well as strategic portfolio management. Before joining the Secondaries team, Andrew spent over four years with Churchill focused on private equity fund commitments, junior capital and equity co-investments.

Prior to joining Churchill in 2018, he worked at Copeley Capital, a Charlotte-based lower middle market private equity firm. Andrew began his career in accounting, performing transaction advisory services and accounting due diligence for middle market private equity transactions.

Today's Featured Speakers

**Martine Seiden Agatston**

Senior Counsel, Tax

Proskauer

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Martine Seiden Agatston is a senior counsel in the Tax Department in the Los Angeles office.

Martine's practice focuses on general tax matters, including domestic and international transactions.

Representative matters have included U.S. and cross-border financings, debt and equity capital markets transactions, complex mergers and acquisitions and corporate restructurings, as well as representation before the tax authorities. She also has acted for REITs, RICs (including BDCs) and other regulated investment entities on transactional matters.

**Seth Cadan**

Managing Director, Product Development

Ares Management Corporation

Mr. Cadan is a Managing Director within Ares Wealth Management Solutions, which oversees Ares' client management activities in the global wealth channel.

Prior to joining Ares in 2023, Mr. Cadan was a Vice President in the Private Wealth Solutions Group at Blackstone, where he focused on product strategy. Previously, Mr. Cadan was a Senior Consultant at Deloitte, where he led strategy and operations engagements for clients in the asset management industry. Mr. Cadan holds a B.A. from Vanderbilt University in Economics.

Today's Featured Speakers

**Michael Choate**

Partner, Capital Markets

Proskauer

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Michael focuses on securities and corporate finance matters, including public and private offerings of both equity and debt securities with an emphasis on REITs and real estate funds, including mergers and acquisitions, corporate governance issues and federal securities compliance matters impacting these entities.

Michael's representative experience includes advising publicly-traded and non-listed REITs and private real estate funds and investors in equity and debt offerings of more than \$30 billion, structuring public and private equity and debt offerings, and representing publicly and privately held entities in merger and acquisition transactions, including various REIT internalization transactions and counseling boards and managers on fiduciary duties and governance matters.

**Jason Kahn**

Managing Director, General Counsel

Lexington Partners

Jason Kahn is a Managing Director and the General Counsel on the Legal and Compliance team primarily focused on overseeing legal and regulatory matters for Lexington and its funds.

Jason joined Lexington as a senior associate in 2013 from Seward and Kissel LLP, where he was a private funds attorney focused on fund formation, regulatory and transactional matters for private equity funds and hedge funds.

Today's Featured Speakers

**John Mahon**

Partner, Registered
Funds

Proskauer

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John Mahon is a partner in the Investment Management practice and Head of the Registered Funds group. John has nearly 20 years of experience working with asset management clients in structuring, launching and managing regulated fund products and other permanent capital vehicles.

John represents private equity firms, credit managers and other financial sector participants in a wide range of fund formation, capital markets and securities law matters, including both public and private offerings of business development companies (BDCs) and other alternative vehicles, such as registered closed-end funds and interval funds.

**Kate Dowley**

Vice President, Investor
Relations

W Capital

Kate serves as the Vice President of Investor Relations at W Capital Partners where she is responsible for fundraising, investor relations and communications. Kate joined W Capital in 2024 from L Catterton, where she worked in Investor Relations both in the U.S. and the U.K. Prior to that, she was part of the Investor Relations team at Lindsay Goldberg. Kate started her career at S&P Global.

Kate received a B.A. in Public Policy from The University of Chicago.

Today's Featured Speakers

**Andrew Griffin**

Associate General Counsel
StepStone Group, LP

Mr. Griffin is a member of the legal and compliance team and is responsible for fund formation and operational legal matters across StepStone's Venture Capital and Growth Equity platform.

Prior to joining StepStone, Mr. Griffin was an associate at the law firms of Cooley and Gunderson Dettmer, where his practice focused on the structuring, formation and operation of venture capital and other private equity funds and their related general partner and management company entities. Earlier in his career, Mr. Griffin was an Assistant Vice President and Associate Counsel at State Street Corporation. Mr. Griffin received his B.S. from Northeastern University and his J.D. from Boston University School of Law

**Kevin McCormick**

Managing Director
Campbell Lutyens

Kevin joined Campbell Lutyens in 2021 as a member of the U.S. fund placement team and focuses on private credit origination, placement and advisory activities.

Prior to joining Campbell Lutyens, Kevin spent eight years in Barclays' Leveraged Finance group covering Financial Sponsor and Consumer Retail clients, most recently as a Director. Kevin left Barclays in 2017 to serve as CFO of Brodo Broth Co before returning to Barclays in 2018.

Kevin holds a BS in Finance and Marketing from Northeastern University.

Today's Featured Speakers



Chris Mitrovich

Managing Director, Business Development, Investor Relations
Apogem Capital

Chris is a member of the Business Development & Investor Relations team. He is responsible for business development and consultant relationships globally. Clients include public/corporate pension plans, foundations, endowments and family offices.



Kerry Shriver

Partner, Private Funds
Proskauer
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Kerry advises fund managers, institutional investors and investment advisors across the full spectrum of investment fund matters. Her particular expertise concentrates within the areas of private credit, venture capital, buyout and secondaries, including the establishment of complex fund structures, portfolio investments, secondary market transactions, co-investment transactions, as well as advising on ongoing operational issues.

The majority of Kerry's practice involves representing fund sponsors in structuring private investment funds and funds of funds, and representing U.S. and global institutional investors and investment advisors in the private equity field. Kerry also represents large institutional investors, or their advisors, in connection with the acquisition and sale of secondary partnership interests.

Today's Featured Speakers



Cannelle Trouillot
Principal, Legal
DigitalBridge

Cannelle Trouillot is a Principal at DigitalBridge Investment Management, a global investment firm focused exclusively on digital infrastructure with approximately \$96 billion in assets under management. She leads fund formation across the firm's investment platforms, including its value-add, core, credit and venture strategies.

Prior to joining DigitalBridge, Cannelle was an associate in the Asset Management Group at Fried, Frank, Harris, Shriver & Jacobson LLP, where she advised fund sponsors on the formation and negotiation of private investment vehicles across a range of strategies and jurisdictions.

A native French speaker, Cannelle earned her J.D. from Yale Law School, where she served as a Managing Editor of the Yale Journal of International Law and served on the Executive Board of Yale Law Women. She holds a B.A., cum laude, from Columbia University.

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For additional information on matters discussed today, please refer to the contacts below:

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