

2023 Capital Raising & IR Meeting

Convene: 2nd Floor, 101 Greenwich Street, NYC | December 7

THURSDAY, DECEMBER 7

8am	Breakfast
8:50am	Welcome comments: NAREIM Capital Raising & IR committee Chair: Michelle Wells , Managing Partner, Waterton Co-Chair: Scott Arden , Managing Director, Sentinel Real Estate
9am	Politicizing ESG: How are you balancing the tightrope? Speakers: Jennie Morawetz , Partner, ESG & Impact, Kirkland & Ellis LLP Sayuri Khandavilli , Vice President, Real Estate Specialist, Nuveen Real Estate Michelle Wells , Managing Partner, Waterton <ul style="list-style-type: none"> Exploring the gap between expectations and understanding when it comes to dealing with ESG-related matters, taking a deep dive into the data behind it.
10am	Break
10:15am	Raising capital from non-institutional sources Session leaders: Ben Lathrop , Senior Vice President, Director of Business Development & Client Services – Real Estate, Bailard Inc. Brandon Sedloff , Managing Partner & Senior Vice President, Juniper Square Speaker: Athena Ole , Managing Director, Alternative Investments, JP Morgan Chase <ul style="list-style-type: none"> Workshopping the best approaches for fundraising, where the biggest obstacles are and what you should know going forward.
11am	Break
11:15am	How to launch a DC product Moderator: Jani Venter , Head of Defined Contribution Real Estate Solutions, J.P. Morgan Asset Management Speakers: Kevin Walsh , Principal, Groom Law Group Greg Jenkins , Managing Director – Head of Institutional Defined Contribution, Invesco <ul style="list-style-type: none"> Managers share a real time pulse of the DC market, as well as how to understand DC real estate appetite and manager considerations to get started.
12pm	Lunch
1pm	What's on your mind? Speakers: Reza Basharzad , Managing Director, Clarion Partners Scott Arden , Managing Director, Sentinel Real Estate <ul style="list-style-type: none"> NAREIM members' open-mic session to exchange best practices, challenges faced, and lessons being learned.
1:45pm	Break
2pm	Professional development workshop: What are the skill sets needed for the future of fundraising? Speakers: Marcus Berry , Head of Investor Relations, TA Realty Michelle Wells , Managing Partner, Waterton <ul style="list-style-type: none"> Roundtable exercises on the attractiveness of capital raising roles in the future; recruitment and training; networking and conferences strategies.
3:30pm	Break

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THURSDAY, DECEMBER 7 <i>continued</i>	
3:45pm	LP rapid fire: The latest investment trends Session leader: Scott Arden , Managing Director, Sentinel Real Estate Speakers: Danita Johnson , Managing Director – Real Assets, Maryland State Retirement and Pension System Shawn Veldhouse , Deputy Director of Real Estate Investments, New York State Common Retirement Fund Adam Berkowitz , Managing Director, Head of Real Assets, Prudential Financial <ul style="list-style-type: none">Members will hear from LPs on what’s working, what’s not, where opportunities lie and what they foresee for the capital raising space.
4:30pm	End of meeting

2023 CAPITAL RAISING & IR COMMITTEE

NAREIM thanks the 2023 Capital Raising & IR Committee members, including:

Chair: Michelle Wells, Waterton; **Co-Chair:** Scott Arden, Sentinel Real Estate Corporation; Todd Fowler, American Realty Advisors; Ben Lathrop, Bailard, Inc.; Reza Basharzad, Clarion Partners; Tyler Scheppmann, Dermody Properties; Brandon Sedloff, Juniper Square; Thomas Metzler & Jeana Corker, MetLife Investment Management; Carl Boswell, National Real Estate Advisors; Sayuri Khandavilli, Nuveen Real Estate; Marcus Berry, TA Realty; Lisa Beeson, The CenterCap Group; Evelyne Dube, Tricon Residential

For 30 years, NAREIM has been the home of real estate investment management benchmarking and best practice education. Our focus is on peer-to-peer networking, where the only conversations are candid and brutally honest. You come to NAREIM to understand what is working and what is not working among peers. NAREIM is where you understand what the industry is really thinking.

NAREIM represents 11 functional areas within the real estate investment management firm, providing in-person and virtual connections for each group throughout the year:

- Architecture, Engineering & Development
- Asset Management
- Capital Raising & IR
- Data & Information Management
- DEI
- Sustainability
- Executive Officer
- Legal, Compliance & Risk
- Marketing & Communications
- Portfolio Management
- Talent Management

NAREIM CALENDAR 2024		
January 31	Portfolio Management dinner	NYC
February 7	Global Real Estate DEI Survey: Results	Virtual
March 5–6	Sustainability	Atlanta
March 27	Black Real Estate Roundtable	NYC
May 15	Latinx Real Estate Roundtable	NYC
June 5–6	Portfolio Management	NYC
June 5–6	Asset Management	NYC
September 11–12	Architecture, Engineering & Development	Austin
September 25–27	Executive Officer	Dallas-Fort Worth
October 8–9	Data & Information Management	Atlanta
October 23–24	Talent Management	Chicago
December 4–5	Capital Raising & IR	Austin

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled through 2024. Please check the NAREIM website regularly for more details. www.nareim.org