



2026 Portfolio Management Meeting

Goodwin Procter, 620 8th Avenue, 26th Floor, New York, NY 10018 | June 4

Thursday, June 4

8:00 am	Breakfast
9:00 am	Welcome Comments & Committee Update Co-Chair: <i>Ian Braverman, Director, Portfolio Management, Harrison Street Asset Management</i> Co-Chair: <i>Jake Maliel, Partner, Portfolio Management, TA Realty</i> NAREIM: <i>IvyLee Rosario, Head of Programs</i>
9:10 am	Attendee Introductions To help facilitate connections, each attendee will be invited to briefly introduce themselves by stating their name and the organization they represent.
9:15 am	Modern Portfolio Management: Teams, Strategy, Execution Session leaders: <i>Xi Huang, Head of Separate Accounts, CBRE Investment Management; Michelle Roland, Vice President, Asset Management & National Leasing, Dermody</i> Speaker: <i>Michelle Yelaska, Vice President, Strategy & Leadership Advisory, Ferguson Partners</i> The scope of the Portfolio Management role has evolved over time — but have our teams kept up? This session tackles the hard questions around what Portfolio Management should become, how to build a team fit for 2026 (and beyond), and what operational excellence looks like in practice. Come ready to rethink the playbook with your peers.
10:30 am	Break
10:45 am	Capital Markets & the Macro Environment Session leaders: <i>Kate Bassett, Director, Associate Portfolio Manager, Invesco Real Estate; Jake Maliel, Partner, Portfolio Management, TA Realty</i> Speaker: <i>Mark G Roberts, Managing Director of Research, Crow Holdings & The Folsom Institute for Real Estate at SMU</i> In an interactive discussion with the Managing Director of Research at Crow Holdings and The Folsom Institute for Real Estate at SMU, we'll touch upon broad macroeconomic themes and capital markets behavior, as well as benchmarking within the real estate industry and how it has evolved over time.
11:45 am	Break



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Thursday, June 4 *continued*

12:00 pm	Data-Driven Real Estate: Using AI From the Property Level to Investment Strategy Session leaders: <i>Cory Saunders</i> , Head of Investments & Portfolio Manager, Fidelity Investments; <i>Frank Garcia</i> , Managing Director, Pretium Partners Speakers: <i>Christopher Sameth</i> , Head of Capital Markets Quants, Americas, JLL; <i>CJ Halabi</i> , Managing Director, AI, Innovation & Digital Product, Pretium Partners This session will delve into practical applications of AI at the property level to drive efficiencies, how AI can assist in rolling up property-level data to aid portfolio-level decisions, and touch on the impact of adding AI to the existing data infrastructure.
1:00 pm	Lunch
2:00 pm	Portfolio Management's Role in Fundraising Session leaders: <i>Will Hedley</i> , Principal, BGO; <i>Ian Braverman</i> , Director, Portfolio Management, Harrison Street Asset Management; <i>Justin Gleason</i> , Managing Director & Portfolio Manager, PGIM Given the current fundraising environment, Portfolio Managers continue to play an increasing role in the fundraising process. In this session, we'll analyze survey results regarding Portfolio Management's involvement in the process, from both an investor-facing perspective and internal operations perspective. We'll also discuss what Portfolio Managers are hearing from investors and how we interact with our business development/client representatives.
3:15 pm	Break
3:30 pm	What's on Your Mind? Session leaders: <i>Samantha Davis</i> , Senior Vice President, Global Portfolio Management, Sentinel Real Estate; <i>Husayn Hasan</i> , Portfolio Manager, UBS Realty Advisors This open mic forum allows attendees to discuss timely issues with peers that haven't already been explored throughout the day's other sessions. What keeps you up at night? What's your team's biggest struggle? Join us for a whole-room conversation on topics brought up directly from the audience.
4:15 pm	Meeting Adjourns



THE NATIONAL ASSOCIATION OF
REAL ESTATE INVESTMENT MANAGERS

2026

2026 Portfolio Management Committee

Co-Chair: *Ian Braverman, Harrison Street Asset Management*

Co-Chair: *Jake Maliel, TA Realty*

Will Hedley, BGO

Xi Huang, CBRE Investment Management

Michelle Roland, Dermody

Cory Saunders, Fidelity Investments

Kate Bassett, Invesco Real Estate

Justin Gleason, PGIM

Frank Garcia, Pretium Partners

Samantha Davis, Sentinel Real Estate

Husayn Hasan, UBS Realty Advisors

Thank you to our NAREIM Industry Partner Goodwin Procter for providing us with space to host this meeting.

NAREIM Meetings Calendar

2026

June 10	Technology, Data & AI Survey Analysis	Virtual
July 14–15	Talent Management	Chicago
September 15–16	Architecture, Engineering & Development	Boston
September 23–25	Executive Officer	Dallas-Fort Worth
October 6–7	Data & Information Management	Chicago
November 4	Legal, Compliance & Risk	New York City
November 11	Compensation Strategies	Virtual
December 2–3	Capital Raising & Investor Relations	Dallas

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NAREIM has a new member portal and website! As a member, the Info Hub is your one-stop hub for everything you need to stay connected, informed, and engaged with our community. See below for the different ways to utilize its offerings.

My Info: You'll find quick access to your contact details, invoices, company profile, and list of company contacts. *Be sure to keep your profile updated so others can find and connect with you.

Events: See at a glance a list of all upcoming meetings, register for meetings and see your current registrations.

Resources: Easy access to meeting takeaways and presentations, benchmark and member pulse surveys, articles and attendee lists, available only to members.

Member Directory: Connect easily with peers and expand your network.

To create your login, explore the portal, and review your existing company and contact information, visit nareim.org.



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