

2024 Data & Information Management Meeting

Piedmont Office Realty Trust, 999 Peachtree Street, Atlanta, GA | October 9

WEDNESDAY, OCTOBER 9

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| 8am | Breakfast |
| 8:50am | <p>Welcome comments & NAREIM Data & Information Management Committee</p> <p>Co-Chair: Pete Schow, Executive Director Head of Data, Affinius Capital Co-Chair: Armel Traore dit Nignan, Head of Data & Analytics, Principal Asset Management</p> |
| 9am | <p>Dirty data: How to deal with it, and the lack of industry standards for data quality</p> <p>Speakers: Ben Tremblay, Senior Analyst, Real Estate Data Management, Nuveen Real Estate Michael Craft, Director – Data Strategy, Stockbridge Capital Group Kathleen Hurley, CEO & CIO, Sage Inc.</p> <ul style="list-style-type: none"> Do you keep hearing about how important clean data is, and can't figure out why you care? In the context of governance, regulatory and compliance, explore how data management policy and practice ties to and can improve your business outputs and operations through a hands-on data normalization exercise and exploration of a data quality dashboard that has real-life applications. |
| 10:15am | Break |
| 10:30am | <p>Transitioning to a fund admin: Data migration and reporting requirements</p> <p>Moderator: Andrew Dwyer, Director, Institutional Sales, Juniper Square Speakers: Pete Schow, Executive Director – Head of Data, Affinius Capital Adam Atwood, Director, Fund Accounting, Juniper Square</p> <ul style="list-style-type: none"> Are you considering outsourcing Fund Administration? In this session we will talk through initial due diligence and considerations for onboarding, full portfolio or specific investment strategy approaches, data integration and reporting, and maintaining stakeholder and investor engagement. Additionally, we will review lessons learned from real world scenarios. |
| 11:30am | Break |
| 11:45am | <p>Mapping the PropTech landscape: What exists out there, how to choose the right partner, and what's on the horizon?</p> <p>Session leaders: Francesco Munaco, Vice President – Portfolio Management, Alidade Capital Vicki Dodig, Director of Sales, Yardi Systems</p> <ul style="list-style-type: none"> This session will encourage small group discussions on (1) existing PropTech solutions, (2) best practices for evaluating a PropTech solution, and (3) anticipated future PropTech solutions and their impact on a firm's toolkit. Insights from small group discussions will be shared with the broader group and later documented to be provided as key takeaways for attendees. |
| 12:30pm | Lunch |
| 1:30pm | <p>AI: Exploring use cases from efficiency gains to predictive analytics</p> <p>Speakers: Sach Diwan, Global Head of Technology, LaSalle Investment Management Armel Traore dit Nignan, Head of Real Estate Data & Analytics, Principal Asset Management</p> <ul style="list-style-type: none"> In this interactive session, learn what your peers are doing to separate fact from fiction. You will hear how their organizations leverage generative AI, machine learning and analytics, to create breakthrough gains for their firms. |
| 2:30pm | Break |

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WEDNESDAY, OCTOBER 9 *continued*

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| 2:45pm | How are you educating your boards/CEOs on the cultural change of technology? |
| <p>Session leaders: Rish Gosine, Managing Director, Head of Technology & Data Analytics, Pennybacker Capital Mike Goodwin, Chief Technology Officer, Stockbridge Capital Group Doug Prickett, Senior Managing Director of Investments & Analytics, Transwestern Investment Group</p> <ul style="list-style-type: none"> • <i>Let's discuss how organizational change and new technology initiatives are put in motion, with change management being as much a strategy as it is a necessary evil.</i> • <i>Whether bottom-up or top-down, how should you handle your C-Suite to push forward in the CRE tech landscape?</i> | |
| 3:45pm | End of meeting |

2024 DATA & INFORMATION MANAGEMENT COMMITTEE

NAREIM thanks the 2024 Data & Information Management Committee members, including:

Co-Chair: Pete Schow, Affinius Capital; **Co-Chair: Armel Traore dit Nignan**, Principal Asset Management; **Francesco Munaco**, Alidade Capital; **Andrew Dwyer**, Juniper Square; **Sach Diwan**, LaSalle Investment Management; **Ben Tremblay**, Nuveen Real Estate; **Rish Gosine**, Pennybacker Capital; **Mike Goodwin & Michael Craft**, Stockbridge Capital Group; **Doug Prickett**, Transwestern Investment Group; **Vicki Dodig**, Yardi Systems

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 10 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 & Investor Relations
- Data & Information Management
- DEI
- Executive Officer
- Legal, Compliance & Risk
- Portfolio Management
- Sustainability
- Talent Management

| NAREIM CALENDAR 2024–2025 | | |
|---------------------------|--|-----------|
| October 8–9 | Data & Information Management | Atlanta |
| October 23–24 | Talent Management | Chicago |
| November 7 | Legal, Compliance & Risk | NYC |
| December 4–5 | Capital Raising & Investor Relations | Austin |
| March 4–5 | Sustainability | Charlotte |
| April 30 | LatinX Real Estate Roundtable | NYC |
| June 3–4 | Asset Management | NYC |
| June 3–4 | Portfolio Management | NYC |
| July 15–16 | Talent Management | Boston |
| September 9–10 | Architecture, Engineering & Development | Atlanta |
| September 17–19 | Executive Officer | Park City |
| October 7–8 | Data & Information Management | Nashville |
| November 5 | Legal, Compliance & Risk | TBD |
| December 2–3 | Capital Raising & Investor Relations | Nashville |

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled through 2025. Please check the NAREIM website regularly for more details. www.nareim.org