




**2019 LOFT
INVESTORS
FORUM**



ABOUT OUR PROGRAM

The HHF Investors Forum is an initiative for Latino investors: trustees, investment staff, and asset managers. The Forum

1. provides educational content on investments and asset management best practices,
2. builds a diverse network of investors and asset managers, and
3. creates a pipeline of Latinos to grow into trustee and senior investment roles.

We started the HHF initiative in 2014 to fulfill the pillars from above.

ABOUT HHF

The Hispanic Heritage Foundation – a nonprofit established by the White House in 1987 – inspires, prepares, and connects minority leaders in the classroom, community, and workforce to meet America’s priorities. HHF also promotes cultural pride, accomplishment, and the great promise of the community through public awareness campaigns seen by millions. HHF is headquartered in Washington, DC, and Los Angeles with satellite work spaces in New York, Silicon Valley, San Antonio, and Miami.



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**June 6, 2019
Oakland, CA**

The Hispanic Heritage Foundation Investors Forum is hosting its Sixth Annual Conference in Oakland, California. We will gather a network of experts and key stakeholders in the industry to share their expertise and provide educational training to Trustees.



AGENDA

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Welcome Remarks

- Sergio Garcia, Board Director at Hispanic Heritage Foundation
- Emcee: Martha Hernandez, CEO of madeBOS

Increasing Allocation to Diverse Managers Case Studies

- Joncarlo Mark, Founder and Managing Member at Upwelling Capital
- Scott Chan, Deputy Chief Investment Officer at CalSTRS
- Rodney June, Chief Investment Officer at LACERS
- Robert Sinclair, Chief Investment Officer at Private Family Office

Personal Experiences of Trustees in Driving Change

- Moctesuma Esparza, former Trustee at LACERS
- Ophelia Basgal, Trustee at ACERA, Mills College, and San Francisco Foundation
- Cynthia Ruiz, Trustee at LACERS

Investing in the Private Markets

- Rosa Estrada, former institutional Portfolio Manager
- Gustavo Alberelli, Managing Partner at Sunstone Partners
- Jesús Argüelles, Director of Investments at The James Irvine Foundation
- Monica Black, Partner at TheVentureCity
- Xavier Gutierrez, Managing Director at Clearlake Capital
- Al Hemmingsen, Chief Investment Officer at Parkland Management Company
- Roman Leal, Managing Partner at Leap Global Partners

Emerging and Specialized Manager Programs

- Gerardo Martinez, Investment Analyst at Illinois State Treasurer
- Julian Allen, Managing Partner at Spitfire Capital
- Arthur R. Guimaraes, COO at UC Regents Office of the CIO
- Bahiyah Robinson, Founder & CEO at VC Include
- Kirk Sims, Head of Emerging Manager Program at Teacher Retirement System of Texas

Lunch Keynote: State of the Capital Markets

- Claudia Rivas Senior Financial Advisor at Merrill Lynch
- Rob Romero, Chief Executive Officer at Connective Capital
- Anthony Valencia, Managing Partner at East Los Capital
- David R. Wilson, Managing Director, Client Portfolio Manager at Nuveen Asset Management

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Opportunities in Real Estate and Real Assets & Current Lending Environment

- Andre Bueno, Principal at Bueno Group
- Vanessa Delgado, Managing Partner at Azure Development
- Alan Dones, Managing Partner & CEO at SUDA
- Arthur Hidalgo, Managing Partner at Carpenter Community BancFund
- Chris Rodzewicz, Partner at Cloverlay
- Tash Salas, Principal Partner & Advisor at Artha Consulting

Cultivating the Next Generation of Women Leaders

- Stephanie Castellanos, Diversity & inclusion strategist
- Marisela Garcia Marquez, Founder and CEO at Iberus
- Paola Garcia, Private Wealth Advisor at Goldman Sachs
- Tracy Gray, Managing Partner at The 22 Fund
- Rebeca Hwang, Managing Partner at Kalei Ventures

Emerging Manager Showcase

- Carmen Palafox, Managing Partner at MiLA Capital
- Maria Salamanca, Investor at Unshackled Ventures
- Lisa Feria, CEO at Stray Dog Capital
- Ariel Jaduszliwer, Managing Partner at Brainstorm Ventures
- Miriam Rivera, Managing Partner at Ulu Ventures
- Rami Reyes, Principal at NextEquity Partners
- Noramay Cadena, Managing Partner at MiLA Capital
- Amit Garg, Managing Partner at Tau Ventures
- Christine Kenna, Partner at IGNIA Partners
- Consuelo Valverde, Founding Partner & Managing Partner at SV LATAM Capital
- Alejandro Garcia-Amaya, Co-Founder at Nilo Ventures
- Samara Mejia Hernandez, Founding Partner at Chingona Ventures

Closing Remarks

- Rosie Rios, Former Treasurer of the United States

OUR SPONSORS

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THANK YOU



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