



**2023 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.



# 2023 LOFT INVESTORS FORUM

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**Thursday, May 12, 2023**  
**Finix Headquarters | San Francisco, CA**

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

The Hispanic Heritage Foundation is a 501(c)(3) national non-profit established more than 35 years ago. The HHF Investors Group helps pensions, endowments, and foundations improve performance with diversity.





## **Letter from our Board Chair**

### **Emanuel Pleitez Board Chair**

Dear Forum participants,

It is my great privilege to welcome you to the 10th Annual HHF Investors Forum. For background, HHF is an award-winning nonprofit that identifies, inspires, prepares and positions Latino leaders in the classroom, community and workforce to meet America's priorities.

In the investor community, we understand the importance of representation and that is why we are thrilled that you all have joined us today, to learn, develop, collaborate, and continue to take action to improve institutional investing and build a community of investors who value diversity and its impact.

We had our first Forum nine years ago in Washington, D.C. Today, in our 10th Annual Investors Forum, we are excited to bring together a group of investors who represent over \$1 trillion in assets. They will provide educational content through a series of educational panels.

Today's panelists include CIOs, Portfolio Managers, asset management firm Founders, and other senior investors from some of the most significant pension funds to trailblazing private equity firms.

We would like to give special thanks to our sponsors this year: Primestor and Barnes & Thornburg, and our industry partners California State Teachers' Retirement System, State of New York Comptroller's Office, Maryland State Retirement and Pension System, and New America Alliance.

We hope this Forum is informative, enjoyable and, most importantly, productive.

Emanuel Pleitez  
Board Chairman  
Hispanic Heritage Foundation

# AGENDA

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## Thursday, May 11

### Networking Reception

- Finix Headquarters

## Friday, May 12

### Welcome Remarks

#### Economic & Capital Markets Outlook

- Angel Saad, Co-Founder at AEQ Capital
- Amanda Renteria, Chief Executive Officer at Code for America and Board Member at President's Commission on Hispanic Affairs and the Treasury Advisory Committee on Racial Equity (TACRE)
- Jose Fernandez, Partner & Co-COO at StepStone Group

#### Asset Allocation with Trustees & CIOs

- Angel Saad, Co-Founder at AEQ Capital
- Anyori (AJ) Hernandez, President & CEO at New America Alliance (NAA)
- Gina Sanchez, Trustee at LACERA
- Jose Luis Pacheco, Chair, Performance, Compensation & Talent Management (PCTM) Committee, Vice-Chair, Pension & Health Benefits Committee & Board Member at CalPERS Board of Administration
- Rodney June, Chief Investment Officer at Los Angeles City Employees' Retirement System (LACERS)
- Rodrigo Garcia, Global Chief Financial Officer & US President at Talipot Holdings
- Ophelia Basgal, 1st Vice-Chair of the Alameda County Employees Retirement Association (ACERA) and Chair of the San Francisco Foundation

#### Real Estate & Real Assets

- Ada Arevalo, Founder & CEO at iimpact Capital
- Adriana de Alcantara, Senior Managing Director, Fund Management and Portfolio Acquisitions, Americas at Hines
- Dominic Garcia, Chief Pension Investment Strategist at CBRE Investment Management
- Ines Olesen, Senior Director, Workplace Investments and US Head of Dispositions Workplace and Retail at Nuveen
- Rodrigo Gonzalez, CEO & Managing Partner at Deodate & City Miles

**Friday, May 12****Fiduciary Duty & ESG**

- Luis Arbulu, Partner at Salkantay Ventures
- Jamie Nulph, Executive Director & ESG Client Coverage at MSCI
- Leticia Corona, Portfolio Manager, Olamina Fund at Candide Group
- Nichol Garzon, Chief Legal Officer, SVP Corporate Development at Glass Lewis
- Sonita Lontoh, Board member; Advisor at Sunrun, TrueBlue; Sway Ventures
- Stonly Blue, Co-Founder and Managing Partner at Third Sphere

**Private Markets**

- Anthony Arnold, Partner at Barnes & Thornburg
- Allen Ruiz, Managing Director at Barings
- Deborah Gallegos, Managing Director and Co-Head of Sustainability at Palladium Equity Partners
- Gustavo Alberelli, Co-Founder and Managing Partner at Sunstone Partners
- Qiana Patterson, Managing Partner at Nayah

**Venture Capital**

- Adrian Mendoza, Founder and General Partner at Mendoza Ventures
- Albert Vazquez, Investment Partner at Sway Ventures
- Jesus Argüelles, Managing Director of Investments at The James Irvine Foundation
- Lu Zhang, Founder and Managing Partner at Fusion Fund
- Nancy Torres, Partner at Ulu Ventures
- Valeria Martinez, Investor at VamosVentures

**Frontier Technologies: Crypto, Web3, & AI – Hype or Not?**

- Betsabe Botaitis, CFO at Hedera Hashgraph
- Christian Narvaez, Founder & CEO at Rayo Capital & Venture Partner at Ripio Ventures
- Rebeca Hwang, Managing Director at Kalei Ventures, Lecturer at Stanford, and Senior Director/Professor of Practice at Thunderbird School of Global Management

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# THANK YOU



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