

# Unlocking Global Investment Opportunities in the Caribbean's Financial Hub

April 9-11, 2025 | Hotel Indigo Grand Cayman



## Wednesday, April 9

### Hotel Check In

**Arrival:** Bag drop, check-in and cold towels upon arrival | **Wellness refreshments:** Fresh juices, herbal teas, or coconut water to revitalize attendees after their journey

LP ONLY (Cobalt Room)

GP ONLY (Sapphire Room)

11:30 – 6:00

### Badge Collection & Hotel Check In at the Conference Center Lobby

*\*\*Please note hotel rooms will not be available until 4pm - luggage storage is available*

4:10 - 4:20

### Chair Welcome

**Lana Callahan**, Managing Director of Investor Relations, Apex Invest

### (Optional) Digital Concierge | Relax and Recharge Drop-in Clinic

4:20 – 4:50

### Fireside Chat | Welcome and Introduction to Grand Cayman

**Sue Nickason**, VP, Dart Family Office

**Steve McIntosh**, CEO, Cayman Finance

Kick off your Apex Invest experience with this casual, yet productive space designed to help you recharge and prepare for the days ahead

4:50 – 5:40

### Investor Roundtables

1. AI/data infrastructure – **Frederick T. Pye**, Founder and Portfolio Manager- Qapture Investments Family Office

2. Blockchain and Crypto - **Bill Barhydt**, CEO - ABRA

3. Insurance/Reinsurance/ILS - **Rudy D'Cunha**, Global Head of Insurance Services- Apex Group

4. Real estate - **Divya Tandon**, Principal and CIO, SJI Properties

5. Alternative energy/climate tech **Jonathan Stearns**, INvestment Partner CFO (i)x Net Zero and **Russell Deakin**, CIO and Founding MD, Oceana Group

6. Longevity/Grounding - **Dawn Marie Lamonica**, Family Office Advisor, DML

7. Secondaries - **Chase O'Malley**, Vice President, Private Markets - Raymond James Financial

- **Digital concierge:** Connect with our dedicated Apex Invest team to finalise your event setup
- **Wellness refreshments:** Sip on fresh juices, herbal teas, or coconut water to re-energise after your journey
- **Revitalising massages:** Hand and arm treatments to relieve stress and refresh your mind

### 17:30 - Workshop | Structuring for Success: Preparing to Attract Family Office and Institutional Capital

This practical workshop will bring together legal, audit, and operational experts, including representatives from Apex, to provide managers with actionable insights on fortifying their structures for institutional investment.

5:40 - 6:10

### Panel Session | The Next Frontier for Family Offices and Ultra-High-Net-Worth Investors

(Moderator) **Divya Tandon**, Principal and CIO, SJI Properties

**Kevin Ernst**, CIO, Canadian Family Office

**Ellen Snibbe Baker**, Founding Partner, Baker Aurora LLC

**Carrie Harding**, Managing Director, Panthera Family Office; Director Cayman Islands Family Office Association

**Lindsey Sichel Rubinstein**, Chief Marketing & Investor Relations Officer, MD, Opus Capital Management LLC

**Anne Storie**, Country Head, Cayman Islands, Apex Group

**Ron Geffner**, Partner Sadis & Goldberg LLP

**Lance Baraker**, MD Manager Acquisition, Cap Intro Solutions

6:10 - 7:00

### Masterclass | Rum Tasting and Cocktail Making Class (Beta Bar)

7:00 - 9:00

### GPs and LPs Networking Welcome Reception - (Beta Bar)

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## Thursday, April 10 ( Azure Ballroom )

08:15 - 09:00	<b>Breakfast and Registration</b>
09:00 - 09:05	<b>Opening Remarks and Welcome</b> <b>Georges Archibald</b> , Chief Commercial Officer, Apex Group
09:05 - 09:10	<b>Chair Welcome</b> <b>James Burron</b> , Co-Founder & Partner CAASA
09:10 - 09:40	<b>Panel Session   Private Credit and Cross-Platform Investing: Unlocking New Opportunities</b> (Moderator) <b>Mary D'Souza</b> , CIO, Misha Investments <b>Peter Rafferty</b> , CFA, Senior Investment Officer, West Virginia Investment Management Board <b>Deepika Sharma</b> , Director of Portfolio Construction, Blackrock <b>Paul Gyra</b> , Managing Partner - Thompson Family Office
09:40 - 10:10	<b>Panel Session   Redefining Impact and Investment: Evolving Strategies in Philanthropy</b> (Moderator) <b>Josh Roach</b> , Managing Director, Meritage Group <b>Matthew J. Nordgren</b> , Managing Partner, Arcadian Capital <b>Mina Lu</b> , CEO, Victoria's Voice Foundation <b>Sean Coveleski</b> , Senior Vice President - Stand Up To Cancer
10:10 - 10:50	<b>Morning Networking Break and Refreshments</b>
10:50 - 11:20	<b>Fireside Chat   Innovating with Purpose - 5-hour ENERGY® to Family Office and Hedge Fund</b> <b>Manoj Bhargava</b> , Founder, 5-hour ENERGY® and TPlus3 Fund <b>Cavitt Randall</b> , CEO, MBX Clearing
11:20 - 12:00	<b>Panel Session   The Shifting Geopolitical Landscape - Impacts on Global Investment</b> (Moderator) <b>Guy Pinkman</b> , Chair, Lincoln Police and Fire Pension and Advisory Committee Member, Pension Benefit Guarantee Corporation (PBGC) <b>Eveline Gerck</b> , Member of the Board of Directors and Investment Committee, Friends of Yad Sarah, Inc <b>Jonathan Stearns</b> , Investment Partner and CFO, i(x) Net Zero <b>Matt Westbrook</b> , Managing Partner, Coalition Ventures <b>Marco Vicenzio</b> , Global Business and Geopolitics Advisor, Global Strategy Project

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## Thursday, April 10 ( Azure Ballroom )

### Lunch and Networking

12:00 -1:00

#### Lunchtime Briefing | Apex Group Women's Accelerator Network (Cobalt Room 1)

**Mirabelle D'Cunha**, Growth Accelerator, Mirabelle D'Cunha Integrative Wellness

#### Lunchtime Briefing | Masterclass: Blockchain and Crypto – A Long-Term Macro Outlook (Cobalt Room 2)

(Moderator) **Dr Keith Black**, Managing Director RIA Channel; ; Adjunct Faculty, University of Massachusetts

**Barry Thomas**, Partner & Managing Director, Forteus

**Carl Szantyr**, Founder and Managing Partner Blockstone Capital

1:00- 1:30

#### Panel Session | The Future of Real Estate Investment – Strategies for an Evolving Market

**Josh Roach**, Managing Director, Meritage Group  
**Steven Michael**, Principal, Banyan Family Office LLC

**Joseph C. LeBas Jr**, President and MD, Concorde Group Holdings, LLC; Founder and Principal Carswell Family Office  
**Paul Gyra**, Managing Partner Thompson Family Office

1:30 –5:30

### One-on-One Meetings

5:30 - 8:30

#### Apex Beach Night - Mexican Fiesta - ( Seafire Kimpton)

Unwind with peers at our exclusive beachfront reception, featuring a special fireside chat with 6-time Grand Slam champion Kim Clijsters. Enjoy an evening of great conversation, live entertainment, and a relaxed atmosphere to connect with fellow industry leaders.

(Moderator) **Chanmeet S. Narang**, Chief of Staff, Singh Capital Partners

**Kim Clijsters**, Former WTA world. nr. 1 (singles and doubles), current president of the International Tennis Hall of Fame  
**Louis Gresham**, CEO, Hydratac

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Friday, April 11 ( Azure Ballroom )

7:30 - 8:30

**LP ONLY - Courtside Capital: A Morning with Kim Clijsters**

Join legendary tennis champion Kim Clijsters for an exclusive morning session at The Ritz, where LPs will have the unique opportunity to engage in a dynamic on-court experience, blending sport and networking in a relaxed yet inspiring setting

8:00 - 9:00

**Breakfast and Networking**

09:00 - 10:30

**One-on-One Meetings**

10:30-10:35

**Chair Welcome | Tom Brigandi** - Managing Director, Riscura Solutions (USA) LLC

10:35 - 11:00

**Fireside Chat | In Conversation with Don Peebles: The Future of Real Estate, Investment, and Market Influence**

**Romaine Bostick**, TV Anchor, Bloomberg Markets, The Close

**R. Donahue Peebles, Jr.**, Chairman and CEO - The Peebles Corporation

11:00-11:20

**Morning Networking Break and Refreshments**

11:20 -12:00

**Panel Session | The Future of AI in Digital Assets – Transforming Global Investment**

**Vikram Mansharamani**, former professor at Harvard and Yale (Moderator)

**Cary M. Levine**, Family Office Principal, AI Entrepreneur & CTO - Levine Family Office (DBA Ax Global Ventures)

**Andrew Bliss**, Founder & Managing Director, Bliss Capital

**Laurin Bylica**, Co-Founder and Managing Partner - n8 Capital

**Oliver Close**, Senior VP Investments at Dart

**Elliot Vernon**, Principal - Greenlight Re

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Friday, April 11 ( Azure Ballroom )

12:00 – 1:00	<p><b>Lunch and Apex Invest Co-Investment Forum (Cobalt Room)</b></p> <p>Join this exclusive lunchtime activity designed for LPs to share co-investment opportunities, pitch strategic initiatives, and explore potential collaborations. This dynamic forum fosters peer-to-peer networking and knowledge exchange among leading investors seeking to diversify and expand their portfolios.</p> <p>What to Expect:</p> <ul style="list-style-type: none"><li>• 3-Minute Pitches: LPs present co-investment opportunities in a concise and engaging format.</li><li>• Peer Feedback &amp; Discussion: Immediate input and collaborative idea generation from attending investors.</li><li>• Facilitated Networking: Dedicated time to connect over shared investment interests.</li><li>• A unique opportunity to uncover actionable partnerships and gain exposure to diverse investment strategies.</li></ul> <p>(Host) <b>Guy Pinkman</b>, Chair, Lincoln Police and Fire Pension and Advisory Committee Member, Pension Benefit Guarantee Corporation (PBGC)</p>
1:00 - 2:00	<p><b>One-on-One Meetings</b></p>
2:10 - 2:50	<p><b>Panel Discussion   Democratisation of Private Markets: Tokenisation and Blockchain Revolution</b></p> <p>(Moderator) <b>Dr Keith Black</b>, Managing Director, RIA Channel; Adjunct Faculty, University of Massachusetts</p> <p><b>Drew Colaiezzi</b>, Private Investments Principal, McPike Global Family Office</p> <p><b>Laurin Bylica</b>, Co-Founder and Managing Partner, n8 Capital</p> <p><b>Sparrow Mahoney</b>, Founder and CEO, STaX Capital Partners</p>
2:50 - 3:30	<p><b>Panel Discussion   Innovation in Portfolio Allocation</b></p> <p><b>Andreas Calianos</b>, CIO, Skepticus Inc.</p> <p><b>Chris Rogers</b>, Partner, Knollwood Investment Advisory</p> <p><b>Lindsey Rubinstein</b>, Chief Marketing &amp; Investor Relations Officer, Managing Director, Opus Capital Management</p> <p><b>Josh Roach</b>, Managing Director, Meritage Group</p>
3:30 – 5:0	<p><b>One-on-One Meetings</b></p>
5:00-5:20	<p><b>Fireside Chat Reprinting ~Opportunities in hospitality and how to assess them</b></p> <p><b>Robert Joyce</b>, CFO and CIO, The Lutheran Foundation for Long Term Living</p> <p><b>Mikey Tanha</b>, Co-founder &amp; CEO, Noble 33</p>
5:20 – 6:00	<p><b>Better Than Your MBA: Why Athletes &amp; Special Forces Make the Best Business Leaders</b></p> <p><b>Mike Fonseca</b>, President The Fonseca Group (Moderator)</p> <p><b>Matt Lashoff</b>, Founding Partner , Vesta Legacy Group – Former NHL</p> <p><b>Jerry Arteaga</b>, CEO, Valor Exteria Partners - Former Green Beret</p> <p><b>Sergio Zepeda</b> - Managing Partner, Cold Bore Capital - Former SEAL</p>
6:00 – 8:00	<p><b>Caribbean Closing Reception (Pom Pom Rooftop Bar)</b></p>