



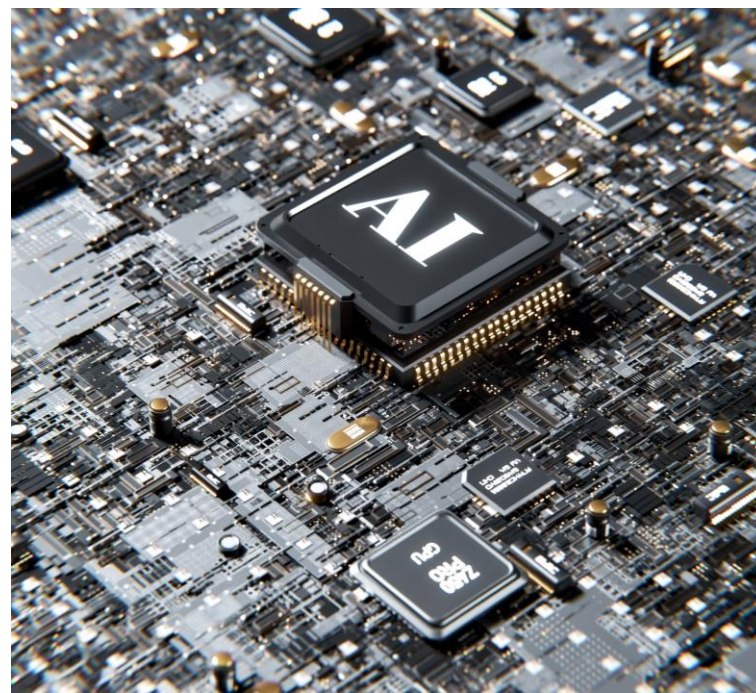
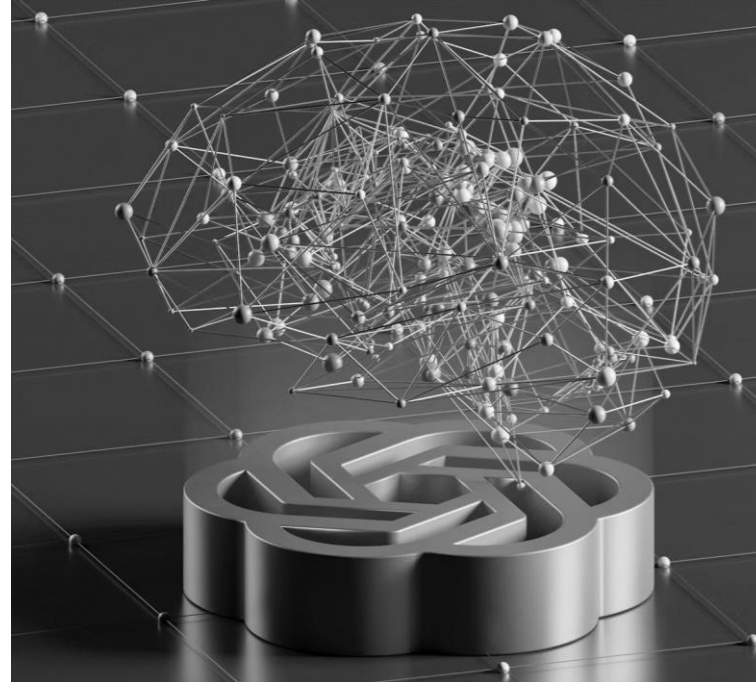
THE AI & BLOCKCHAIN INVESTMENT CONFERENCE

The Fairmont San Francisco, CA
September 4th & 5th, 2024



TABLE OF CONTENTS

Introduction	3
By The Numbers	4
In Attendance	5
Sponsors	6-7
Speaker Bios	8-18
Conference Agenda	19-23
Participation Options	24-29
Carmo Contact Info	30





THE AI & BLOCKCHAIN INVESTMENT CONFERENCE

FAIRMONT SAN FRANCISCO
SEPTEMBER 4TH & 5TH, 2024

Dear Colleague,

It is with great pleasure that I invite you to Carmo's Inaugural Artificial Intelligence and Blockchain Investment Conference. Panel topics cover a wide range of applications and investment opportunities within AI and Blockchain, catering to the interests of institutional investors and family offices seeking to understand and allocate capital into these cutting-edge technologies. Throughout the event industry executives will converge to discuss investment strategies for Investors, AI innovations across industries, VC vs Angel Investing, Regulatory considerations and much more.

We hope that this event helps you capture and understand the opportunities in the next frontier of investment, and we look forward to hosting you in San Francisco.

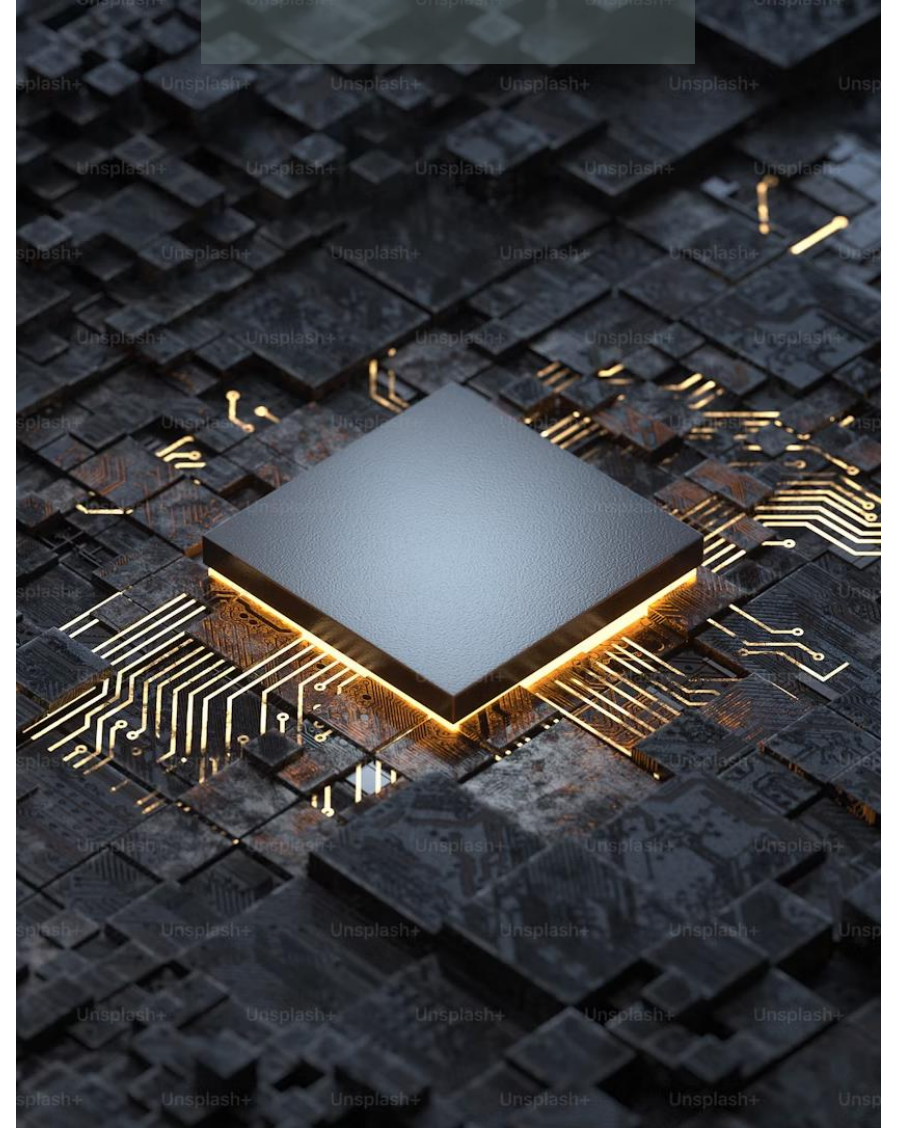
Best,

Roy Carmo Salsinha
President, CEO
Carmo Companies



BY THE NUMBERS

- \$3+ Trillion AUM in attendance
- 150+ Total participants
- 75+ Institutional & Private Wealth Investors
- 75+ Asset Managers
- 5 Industry Exclusive Panel Sessions
- 5+ Hours of Networking
- 1 Full day Conference
- 1 Pre-Event Networking Cocktail





IN ATTENDANCE

C-Level Executives

- Corporate Pension Funds
- Endowments
- Foundations
- Private Equity Funds
- Venture Capital Firms
- Hedge Funds
- Public Pension Funds
- Fund of Funds
- Sovereign Wealth Funds
- AI & Blockchain Portfolio Companies
- Family Offices
- Government officials
- Economists
- Banks and Investment Banks
- Lawyers
- Auditors
- AI Service Providers
- OCIOs/Consultants
- RIAs



SPONSORS

CoinFund

CoinFund was founded in 2015 as one of the first cryptonative investment managers. We have an 8+ year track record in early stage investments, with a mission to champion the leaders of the new internet. We combine deep knowledge of blockchain's underlying technologies and successful crypto business models with differentiating regulatory expertise and an extensive network across the crypto ecosystem. We operate three distinct strategies across early stage venture and liquid markets. While we are generalists by design and will evaluate opportunities in verticals across the web3 landscape, a few areas of particular interest currently are the intersection of AI and crypto, scalability and interoperability, and tokenization of real world assets.



ExperityCPA is an outcome-focused CPA firm specializing in providing customized tax reduction and wealth accumulation solutions for high-net worth individuals and businesses. The firm saves investors, founders, and businesses thousands and cumulatively millions with advanced strategic tax planning. By providing comprehensive tax plans and proactive ongoing advisory, they protect and grow clients' assets while shielding their earnings from tax leakage. The experts at ExperityCPA have the skills and depth of service to address even the most complex businesses.



Welcome to Moon Pursuit Capital. With a founding team boasting nearly a decade of experience in cryptocurrency markets, the company leverages extensive market knowledge, rigorous research, and a unique industry network to deliver a refined investment strategy. Their comprehensive methodology, which integrates fundamental, technical, and sentiment analysis, ensures an in-depth evaluation of investment opportunities. This, combined with a commitment to continuous research and effective risk management, enables Moon Pursuit Capital to navigate the crypto landscape adeptly and deliver superior returns for investors.



SPONSORS



Mission: Oxcart invests exclusively in critical technologies for America and its allies. Thesis: Oxcart makes high conviction investments in founders building the most critical technologies to preserve American global leadership and quality of life. These investments range in sector and stage including AI, defense, dual-use, agtech, healthTech, energy, infrastructure, compute, and space. About: Oxcart is managed by Larry Covert and Bell Beckham.



Pantera Capital is the first institutional investment firm focused exclusively on bitcoin, other digital currencies, and companies in the blockchain tech ecosystem. Pantera launched the first cryptocurrency fund in the United States when bitcoin was at \$65 /BTC in 2013. The firm subsequently launched the first exclusively-blockchain venture fund. In 2017, Pantera was the first firm to offer an early-stage token fund. Pantera Bitcoin Fund has returned over 85,550% in ten years and has returned billions to its investors. Pantera manages \$5.1bn across three strategies – passive, hedge, and venture – exclusively focused on bitcoin, other digital currencies, and companies in the blockchain tech ecosystem.



VanEck has a history of looking beyond the financial markets to identify trends that are likely to create impactful investment opportunities. We were one of the first U.S. asset managers to offer investors access to international markets. This set the tone for the firm's drive to identify asset classes and trends – including gold investing in 1968, emerging markets in 1993, and Exchange Traded Funds in 2006 - that subsequently shaped the investment management industry. Today, VanEck offers active and passive strategies with compelling exposures supported by well-designed investment processes. The firm's capabilities range from core investment opportunities to more specialized exposures to enhance portfolio diversification. Our actively managed strategies are fueled by in-depth, bottom-up research and security selection from portfolio managers with direct experience in the sectors and regions in which they invest. Investability, liquidity, diversity, and transparency are key to the experienced decision-making around market and index selection underlying VanEck's passive strategies. Since our founding in 1955, putting our clients' interests first, in all market environments, has been at the heart of the firm's mission.



Mohammad Rasouli

AI Researcher, Stanford University, Founder & CEO, Alx2

Dr. Mohammad Rasouli is a thought leader in AI and technology for investment. He is both Stanford researcher as well as CEO of Alx2.ai. He is also PhD in AI, ex-McKinsey where he managed automation of top -20 private equity funds from the New York office, and ex-Microsoft engineer. In Alx2.ai, Mohammad and his team have partnered up with many funds to empower them with state-of-the-art AI solutions. His work on AI for funds is covered in top industry conferences and journals. His technical papers on AI algorithms are published in top AI venues with 500+ citations.



Erick Gorodezky

VP – Alternative Investments, Talipot*

Erick has been active in the blockchain and cryptocurrency ecosystem since 2017; he has cultivated a robust network of relationships, enabling him to navigate and capitalize on evolving opportunities within the space adeptly. As the VP of Alternative Investments, Erick leads the Alpha To Omega strategy development and oversees investments in blockchain, digital assets, and disruptive technologies for a prominent Single Family Office based in San Diego, California. Erick is a CFA Charterholder, holds an MS in Finance degree from the University of San Diego, and has completed the Blockchain Strategy Programme from Oxford University.



Ray Wu

Managing Partner, Alumni Ventures (AV)

Ray is a seasoned venture capitalist with over 20 years of investing experience across a wide range of industries and geographies. Ray is a managing partner of Alumni Ventures, one of the largest US venture firms for individual investors with \$1.2B+ AUM. Ray focuses on AI, SaaS, Web3, IoT/Robotics, FinTech related investments. Prior to Alumni Ventures, Ray was a managing partner and advisor of several global venture funds focusing on investment opportunities across the US and Asia Pacific. In addition, he was the managing director of HP's new business ventures, responsible for startup technology evaluation, new business incubation, VC relationships, and minority investments. Prior to HP, Mr. Wu spent more than six years with Cisco Systems, and held several senior positions leading investment, M&A, internal incubation, and global consulting. Mr. Wu earned a dual EMBA degree from the University of California, Berkeley and Columbia University.



Philipp Reineke

PhD, Stanford University, and COO, Alx2

Philipp (Phil) Reineke is a Stanford researcher in AI/ML for management who worked in and advises startups in the alternative asset tokenization and AI for alternative assets industries. He is a PhD in Management Science and Engineering at Stanford's Technology Ventures Program and COO at Alx2 that's providing AI-driven data integration solutions for alternative investment funds. Phil has published articles in leading management journals such as the Academy of Management Journal and the Strategic Management Journal - including on machine learning in management. He is also leading a study on AI transformation in alternative investment in the context of which him and his co-authors have talked to more than 300 fund managers so far. In addition to his work on machine learning, Phil does research in blockchain applications and blockchain governance. He co-created and taught the Stanford class "Web3 Entrepreneurship" and was a board member of the Stanford Blockchain Club. He holds an MSc in Computational Social Science from Stanford University (US), an MSc in Organizational Behavior from the London School of Economics (UK), and a BSc in Business Administration from WHU business school (DE).



Matt Stephenson

Research Partner, Pantera

Matt serves as Research Partner at Pantera. He was previously Senior Mechanism Designer at BlockScience, and has worked with organizations from Dapper Labs to MakerDAO. He has lectured at Columbia University on DAO governance and his doctoral thesis focused on price discovery and endogenous value in NFT markets. Matt has a PhD in Behavioral Economics & Strategy from Columbia University, Master's in Strategy from Columbia Business School, and M.S. in Economics from the University of Warwick as a Fulbright Scholar.



Miguel Paredes

Senior AI Executive, Adviser & Consultant, Venture Partner, Silicon Foundry

Miguel is a senior AI executive, adviser, and consultant, a Venture Partner at Silicon Foundry, and a fellow / adviser for the AI Fund and Milemark Capital, two AI focused AI VCs. Until recently he was the Vice President of AI & Data Science at Albertsons, where he led strategy and value creation with Data & AI, and co-led the Generative AI program. Miguel holds a PhD in applied artificial intelligence and data science as well as masters' degrees in engineering and economic development, all from MIT. Miguel is an alumni of Harvard Business School where he completed the General Manager Program (GMP). He earned his bachelor's degree in computer science at and has completed several post graduate programs at Stanford, IMD, Columbia, and MIT. Miguel is an angel investor and helps startups with their AI strategy and business development.



Shaan Mehta

Vice President, Private Equity, StepStone Group

Mr. Mehta is a member of the private equity team, focusing on venture capital and growth equity investments. Prior to StepStone, Mr. Mehta was a member of the research team at Greenspring Associates, a venture capital and growth equity investment firm that merged with StepStone in 2021. Prior to that, Mr. Mehta was an associate director at Cambridge Associates where he managed investment portfolios for non-profits institutions, primarily endowments and foundations. Prior to that, he worked at The Vanguard Group. Mr. Mehta received his MBA from The Fuqua School of Business at Duke University. Mr. Mehta is also a CFA charterholder.



Nate Leung

Partner, Sapphire Partners

Nate invests in early-stage venture capital funds on the Sapphire Partners team. He is passionate about partnering with established and emerging firms and supporting aspiring GPs. Before joining Sapphire Partners in 2019, Nate worked on the investment team at Industry Ventures focused on primary and secondary investments in venture capital funds, and direct co-investments in growth-stage companies. Prior to Industry Ventures, Nate held operating roles at early-stage startups including Optimizely where he helped build the technology partner ecosystem. He started his venture capital investment career at Bain Capital Ventures. Nate earned a bachelor's in management science & engineering at Stanford and an MBA from Harvard Business School. He enjoys spending time outdoors and devours epic fantasy and science fiction novels. He was named to the Venture Capital Journal Rising Stars list in 2022.



Sarah Moyer

Vice President, Jasper Ridge Partners

Sarah Guzik Moyer is a Vice President of Jasper Ridge Partners and a member of the private equity team, where she focuses on direct/co-investments, in addition to working on manager selection and secondary transactions. Prior to joining Jasper Ridge Partners in 2020, Sarah worked on direct private equity and venture capital investments at Francisco Partners and G2VP. Previously, Sarah worked for Tesla as a Senior Project Manager leading financial and technical due diligence in the Commercial and Industrial Energy division. Sarah earned a BA in Political Science from Yale University and an MBA from the Stanford Graduate School of Business.



Sandeep Nailwal

Founder, Sentient

Sandeep Nailwal is one of the founders of the Polygon network and currently serves as the chief business officer of Polygon Labs, an international software development company building and developing a network of aggregated blockchains via the AggLayer, secured by Ethereum. In this capacity, his role along with other co-founders is to steward the long-term sustainability growth of the Polygon protocol and ecosystem, and oversee the strategic priorities of Polygon Labs, where he works closely with Marc Boiron, CEO of Polygon Labs. Sandeep's blockchain journey began with Bitcoin in 2013, but the turning point didn't come until he coded his first Ethereum dApp a few years later. In late 2017, he joined hands with Jaynti Kanani and Anurag Arjun in creating Matic Network, the precursor of Polygon, with the goal of helping scale Ethereum. They were joined by Mihailo Bjelic in 2021 to create Polygon. A serial entrepreneur, Sandeep is also the co-founder of Sentient, an AI research organization fostering a new open AGI economy for AI builders and creators built on Polygon. Recently, Sentient secured \$85 million in a seed funding round, co-led by Peter Thiel's Founders Fund, Pantera Capital, and Framework Ventures. Sandeep holds a Master of Business Administration degree from the National Institute of Industrial Engineering. He describes himself as extremely humble, but madly ambitious.



Seth Ginns

Head of Liquid Investments, Managing Partner, CoinFund

Seth is Head of Liquid Investments, Managing Partner, and a key member of the Venture Investment Committee. He has twenty years of Wall Street experience, and has been deeply involved in the crypto community since his angel investment in Coinbase in 2012. He is also an angel in Chainalysis, participated in the Ethereum ICO in 2014, and loves traveling globally to developer events as a way to keep a finger on the pulse of the market. His angel portfolio also includes Instacart and DoorDash, and many earlier stage, high growth startups. Prior to CoinFund, Seth invested in public growth equities over 18 years at Jennison Associates. He holds a BA in Mathematics and South Asia Studies from the University of Pennsylvania, where he is an Overseer at the School of Nursing and Co-Chair of the Innovation Committee, and serves on the International Advisory Board of the Center for the Advanced Study of India at the School of Arts and Sciences.



Anastasiya Giarletta

Partner, R42 Group

Anastasiya is a Principal at the R42 Group, based in London, evaluating companies in longevity science and artificial intelligence. She also manages the R42 Institute, which mentors the next generation of founders in longevity and AI. Previously, Anastasiya co-founded Aikora Health, focused on the longevity biotech ecosystem. She holds a Master's degree in Sustainable Development from St. Andrews University.



Larry Covert

Co-Founder, Managing General Partner, Oxcart Ventures

Prior to co-founding Oxcart, Larry Covert was at Gigafund (SpaceX, BoringCo, X.com, Neuralink) founded by co-founder of PayPal and co-founder of Founders Fund Luke Nosek and Steve Oskoui. Prior Larry has had decades of investing and operating experience in defense tech MILCOM as well as alternative and traditional energy technologies, AI, agtech and healthTech. On board of SSOE, former Advisory Council of Institute of Molecular Medicine.



Jessie Jia Guo

Investment Partner, Next Legacy

Jessie joined the Firm in 2014 and is an Investment Partner investing across the Flagship and Emerging Leaders strategies. She is an engaged member of the exclusive Society of Kauffman Fellows, the premier leadership organization for the venture capital industry. She is also on the permanent board of Bridge Funding Global, a platform and community to support women and underserved emerging managers. Jessie brings to Next Legacy a wealth of industry knowledge and relationships from the venture capital market in China. At CICC, a leading investment bank in China, Jessie focused on private equity and venture capital fund investments. Jessie helped launch a funds research platform and several new investment products for CICC's Wealth Management Business, at the time a novel and burgeoning business in China. She was also part of the pioneering team that initiated CICC's fund of funds business. Before CICC, Jessie helped technology startups raise capital from venture funds at China Renaissance, a leading boutique financial institution that has cultivated many leaders in the Chinese venture industry. Jessie gained entrance to the prestigious Peking University as one of China's top young scholars, where she earned both her master's and bachelor's degrees in finance with honors. She later received her MBA from UC Davis with the highest honors.



Charlotte Zhang

Senior Portfolio Manager, Inatai Foundation

Charlotte Zhang joined Inatai (FKA Group Health Foundation) in November of 2020 and currently serves as the Senior Portfolio Manager, having helped build the Firm's investment program from scratch. Previously, she invested on behalf of two notable family offices based in San Francisco, ICONIQ Capital and Medley Partners. In aggregate, as an LP she has evaluated +159 funds and 23 co-investments, fully underwriting 51 funds and 8 co-investments that represent over \$1 billion of deployed commitments. She began her career as a Technology Investment Banking Analyst at Raymond James, engaged in M&A and equity capital markets transactions for high-growth technology companies. Charlotte earned a Bachelor's of Science with honors in Business Administration from the University of California, Berkeley. She currently serves on the West Coast Steering Committee of the Women's Association of Venture and Equity, as a Panelist for PEWIN's Project Pinklight, and is a member of the Milken Institute's Young Leader's Circle and Rising Allocators.



David Stout

Founder, AI Scientist, CEO, webAI

Accomplished AI researcher and UPenn AI Awardee specializing in Attention Steering, Guided Attention, and Adaptive Large Infrastructure Models. Serial entrepreneur and seasoned technologist. Co-founder and CEO of webAI, developing secure distributed compute infrastructure for AI deployment across enterprise and consumer applications.



Jonathan Bander

Partner, ExperityCPA

Jonathan Bander is an experienced financial professional with over twenty-five years of comprehensive and working knowledge in all aspects of corporate accounting and taxation. Experience includes extensive tax structuring, tax planning, tax strategy, multi-company and multi-divisional accounting, budgeting, forecasting, and financial reporting. His proficiency in cryptocurrency taxation and accounting strategies sets him apart as a trusted advisor in the evolving landscape of virtual currencies. Jonathan has many years experience with financial and operational administration of fund structures, fund of funds, managed accounts, and family office reporting. After college, he worked in Manhattan for several years at regional CPA firms. During this time, he advised many companies of all sizes and provided ongoing services to private equity/family office clients. In 2005, he founded Rich and Bander LLP to provide direct, dedicated and personalized service. Rich and Bander is a NYC based CPA firm that serves over a thousand clients employing a dedicated team of 50+ professionals. In 2022, Jonathan combined forces with Robert Cannon to form ExperityCPA, a virtual family office housing their collective 50+ years of experience. Together and through the support of their team of subject matter experts they offer senior-level tax, accounting, tax-smart financial planning, estate planning, retirement planning, asset protection, growth, and optimization services and other services.



Chris Kelly

General Partner, Kelly Ventures

Chris has a 15 year track record as personal family office head providing angel and later stage investments to multiple successful companies including Alchemy, Chime, Looker (acquired by Google Cloud), SpaceX, Zipline, Silicon Ranch, and public.com. He recently launched Kelly Ventures I, a blockchain-focused venture fund to invest in the deep technological innovation going on in the space. He joined with friends from around California to purchase the NBA's Sacramento Kings in 2013 and keep them in California's capital city. Helping to oversee the construction of the Golden 1 Center as the Kings' new home in downtown Sacramento, Chris and his partners completed a development that is the cornerstone of Sacramento's downtown revitalization. He is an active participant in the NBA's blockchain activities, including the phenomenally successful NBA Top Shot NFT collecting and trading platform. Chris holds a B.A. in Government and Philosophy from Georgetown, a M.A. in Political Science from Yale, and a J.D. degree from Harvard, where he served as editor-in-chief of the Harvard Journal of Law & Technology.



Bijan Foroodian

Advisor, Family Office

Mr Foroodian is part of the team at a private family office and an active investor. In his current role he looks at a variety of investments from early stage private to large cap public companies. His career includes a brief tenure at New Jersey based MPI after having served as Principal of a London based multi family office firm focusing on PE deals in the financial services industry. Mr Foroodian's experience includes his roles as chief investment officer of Inflection Point Capital Management, Chief investment officer of Innovest Strategic Value Advisors, Vice President of Dresdner Kleinwort Benson, Barclays Global Investors and Mackenzie Financial. Mr Foroodian is a CFA charter holder. He completed his studies at the University of Oxford in Engineering, Economics & Management and has a MBA from Imperial College.



Drew Myers

Co-founder and Managing Partner, CrossLayer Capital

Drew Myers is a co-founder and Managing Partner of CrossLayer Capital. Drew was previously a Managing Director at Makena Capital where he spent 12 years on Makena's Private Equity team focused on Venture Capital. Drew developed the firm's thesis for crypto and blockchain and led the firm's investments in the space over three years. Drew has a BA from Eugene Lang College and an MBA from Tuck School of Business at Dartmouth.



Yiwen Li

Head of Venture, Bayview Development

Ms. Li is the Head of Venture and Strategic Investments at Bayview Development Group, a Silicon Valley-based family office with diversified exposure to real estate, private equity, and venture capital. She is responsible for the company's venture investment strategy and started the AI for Impact initiative. Prior, Ms. Li was a Principal at Alumni Ventures, responsible for multi-stage investments focused on healthcare and blockchain. She was Director for Corporate Strategy at Masimo (Nasdaq: MASI), and Director for Corporate Development at NantHealth (Nasdaq: NH). Ms. Li started her career at Capital Group in equity research. Ms. Li served on the board of Give2Asia and the Asia Society. She is an advisory board member of C-Sweet. She was recognized as the "Top 50 Women Leaders in San Jose 2024", "Top 50 Women in 2019" and the "Most Inspirational Women in Web 3". Ms. Li holds a Master's degree from the London School of Economics, a second Master's from the University of Vienna, and a venture capital certificate from UC Berkeley.



Sandhya Venkatachalam
Founder and Managing Partner, Axiom

Sandhya is the Founder and Managing Partner of Axiom, a seed stage venture firm where the best AI practitioners in-market today collaborate to invest in the most transformational AI companies of tomorrow. She invested early in industry leaders like Groq, Fireflies.ai, Helm.ai and Forethought.ai and her seed stage AI portfolio is currently valued at over \$5bn. Previously, Sandhya was a Partner at Khosla Ventures, focused on early stage AI investments. Before her career in investing, Sandhya was a Vice-President and General Manager at Microsoft focused on AI and Communications products. Preceding Microsoft, Sandhya was Head of Corporate Development and Vice President Product at Skype, and helped facilitate the sale to Microsoft for \$8.5 billion. Sandhya began her career on the management team at Andiamo Systems, a leading datacenter startup that was acquired by Cisco for \$1.5 billion. Sandhya holds an M.B.A. from the Wharton School of Business and an A.B. in Economics from Harvard University.



Tim Suzman
Managing Partner, Pioneer Fund

Tim Suzman is Managing Partner of Pioneer Fund, a seed fund investing in the Y Combinator ecosystem. Pioneer Fund is the most active seed investor in the world, and the most active AI investor at seed stage. With backing and expertise from over 400 Y Combinator alumni, Pioneer Fund understands markets and technologies at a founder-to-founder level. Pioneer Fund has invested in AI, robotics, web3, health tech, dev tech, enterprise, saas, consumer, deep tech, climate, fintech, biotech, logistics, gaming, food tech, marketplaces, and almost every other vertical. Tim is a Y Combinator alum from 2011, and has been a successful investor in the YC ecosystem since then. Prior to becoming a founder and investor, he grew up outside Boston where he was a self-taught programmer and state chess champion.



Utkarsh Ahuja
Chief Investment Officer, Managing Partner, Moon Pursuit Capital

Utkarsh Ahuja is the Founder, Managing Partner, and Chief Investment Officer at Moon Pursuit Capital. With a decade of distinguished experience in the cryptocurrency market, he has consistently demonstrated an exceptional ability to generate substantial returns and navigate complex market dynamics. His profound expertise in both the technological underpinnings and market cycles of cryptocurrencies has established him as a highly sought-after authority in the field. Before founding Moon Pursuit Capital, Utkarsh was the visionary behind a marketing and technology firm that was successfully acquired by a leading global conglomerate. Additionally, he played a pivotal role in the founding of a digital education firm that also achieved a notable exit. Utkarsh's academic credentials include graduate degrees in Digital Strategy and Business from MIT and Santa Clara University, as well as bachelor's degrees in Finance, Information Technology, and Psychology from the Georgia Institute of Technology.



Hilary Adams

Head of Business Development and Investor Relations, Hivemind

Hilary Adams is Head of Business Development and Investor Relations at Hivemind. In this capacity she manages global capital raising across all funds as well as managing investor communications, and policy. Hilary joins from a venture firm where she managed external capital raising for joint ventures backed by large corporates across multiple sectors. Prior to that, Hilary was at Jefferies Credit Partners and Solace Capital Partners, a special situations and opportunistic credit fund where she managed IR. She started her career at RBC in Toronto, Canada and graduated from Concordia in Montreal, QC where she also studied PR at McGill. Hilary is based in Los Angeles, CA and is active in her children's school, Baby2Baby, and co-founded and manages an arts non-profit, Canadian Arts Abroad which focuses on the intersection of diplomacy and art.



Kevin Farrelly

VP & Director of Digital Asset Management, Franklin Templeton

Kevin Farrelly, VP and Director of Digital Asset Management at Franklin Templeton, excels in digital asset analysis and early-stage venture capital. He drives investment strategies, conducts due diligence, and manages Franklin Templeton Blockchain Fund I & II. Before Franklin Templeton, Kevin co-founded Random Forest Capital, where he leveraged machine learning for financial investment strategies. Kevin holds dual degrees in finance and marketing from the University of Richmond



Abhishek Sud

Senior Investment Director, Applied Ventures, LLC

Abhishek Sud has been a venture capital and growth equity investor in the enterprise B2B space for nearly two decades, contributing to the success of several industry-defining companies throughout his career. Abhishek joined Applied Ventures to lead its growth equity and software/systems investments in the materials-to-systems stack. He also focuses actively on Indian investments strategic to the Company. During his career, Abhishek has established strong, long-term relationships with venture capital and private equity firms, as well as with CXO-level executives across US, Europe, India and Southeast Asia. His expertise in the broader Technology ecosystem encompasses various subsectors, including AI/ML/GenAI, Deep-Tech, Vertical application software, Infrastructure software, Cybersecurity, Semiconductors, Supply Chain management, and Tech-enabled services. Previously, Abhishek was a Managing Director at Macquarie Group in San Francisco, helping lead its venture and growth equity investments in the enterprise B2B sector. His prior leadership roles include being a Managing Director at Alliance Bernstein and working as a senior investment professional with Rothschild, Centerview, and Investcorp in their technology and software-focused private equity and venture capital groups. He began his career with IBM Consulting in India before transitioning to investment banking with Morgan Stanley's technology banking group in Menlo Park, California. Abhishek holds a BE in Computer Engineering from the University of Delhi and an MBA from the Indian Institute of Management in Ahmedabad, where he graduated with summa cum laude honors from both institutions.



Gina Joseph

Chief Strategy Officer, VentureBeat & GamesBeat

Gina Joseph is the Chief Strategy Officer of GamesBeat and VentureBeat, and board member for Midwest Games, recently honored a top leader 40 under 40, by San Francisco Business Times and featured by Harvard University as "Next Level" alumni. Gina is a seasoned professional with nearly 20 years of experience in media and tech. A Harvard Business School and UC Berkeley alum, she excels in strategic partnerships, ad sales, go-to-market strategy, business development, and operations, consistently driving significant revenue growth for Fortune 500 partners. As the founder of VentureBeat Lab, an innovative arm specializing in thought leadership consultancy and branded content, she's known for her record-breaking sales in digital media marketing and for closing major partnerships with billion dollar tech giants such as Google, Meta, Microsoft, Amazon, and more. Beyond her role at VentureBeat, Gina is a dedicated advocate for diversity and inclusion, particularly for women leaders, and serves as a Board Member for The Daily Californian and the Alumnae-i Network for Harvard Women. Her strategic insights and impact extend to global media events and initiatives, reflecting her commitment to positive and disruptive contributions to the world. With this appointment, Gina is the first Afghan American board member in the US for a games publisher. She is also the first and only Afghan American woman to hold a C-level role for a games and tech publication. Joseph also was elected to be Class Secretary for her graduating class at Harvard Business School and hosts Thought Leadership Alumni events which brings together hundreds of C-level execs together from across the globe.



Brendan D. Gundersen

Managing Director, Institutional Business Development, VanEck

Brendan D. Gundersen joined VanEck in 2017. Managing Director of Institutional Business Development for VanEck's actively managed strategies and VanEck exchange-traded funds. Currently oversees VanEck's efforts with Public and Private pension plans, Foundations, Endowments, Investment Consultants, Private Banks, Trust Banks, Family Offices, and Asset Managers. Prior to joining VanEck, Managing Director and Head of the Institutional Intermediary effort at New York Life Investment Management and served on their leadership team. Previously, Managing Director at BlackRock, built a market leading business and strong partnerships across a variety of institutional and fiduciary clients and led efforts across many product solutions including iShares ETFs, alternatives, SMAs, and active mutual funds. MBA, Finance, State University of New York at Albany; BS, Marketing, State University of New York at Plattsburgh.



Matthew Sigel

Head of Digital Assets Research, VanEck

As Head of Digital Assets Research and Portfolio Manager for the VanEck Smart Contract Leaders Fund, Mr. Sigel helps guide VanEck's digital assets strategy and sits on the investment committee of several of the firm's private funds. He produces frequent research on Bitcoin, smart contract platforms, and emerging markets adoption of digital asset. Prior to VanEck, Mr. Sigel worked as a research analyst and portfolio strategist at CLSA, an analyst and portfolio manager at AllianceBernstein (where he covered technology and other sectors under Cathie Wood), and a journalist at Bloomberg, CNBC and NHK Japan Broadcasting, where he covered finance. Mr. Sigel is a CFA Charterholder and has a BA from Harvard University.

PRE-EVENT NETWORKING MIXER

Wednesday, September 4th

5:00pm – 7:00pm PT

Location: Amador Club – Penthouse
550 Montgomery Street
San Francisco, CA 94111

Sponsored By:



AGENDA OUTLINE

8:00 AM PT

Registration & Breakfast Networking

Sponsored by:

CoinFund

9:15 AM PT

Opening Remarks

Renato Ferreira, Head of AI & Blockchain, Carmo Companies

9:15 AM PT

Investment Strategies for Institutional Investors

This panel will focus on investment strategies for institutional investors looking to capitalize on the AI & Blockchain revolution. Experts will discuss portfolio allocation, risk management, and strategies for maximizing returns in the sector.

Moderator:

Kevin Farrelly, VP & Director of Digital Asset Management, Franklin Templeton

Panelists:

Nate Leung, Partner, Sapphire Partners

Charlotte Zhang, Senior Portfolio Manager, Inatai Foundation

10:00 AM PT

AI Safety & Decentralization

Speakers:

Matt Stephenson, Research Partner, Pantera

Sandeep Nailwal, Founder, Sentient



AGENDA OUTLINE

10:30 AM PT

AM Networking Break

Sponsored By:



11:00 AM PT

AI Innovations Across Industries

This panel will showcase the diverse applications of AI across industries such as healthcare, finance, and manufacturing. Experts will highlight successful use cases, investment opportunities, and strategies for leveraging AI to drive business growth and innovation.

Moderator:

Philipp Reineke, PhD, **Stanford University**, and COO, **Alx2**

Panelists:

Mohammad Rasouli, AI Researcher, **Stanford University**, Founder & CEO, **Alx2**

Miguel Paredes, Senior AI Executive, Adviser & Consultant, Venture Partner, **Silicon Foundry**

Sandhya Venkatachalam, Founder and Managing Partner, **Axiom**

11:45 AM PT

Incorporating Digital Assets in Fund Portfolios

The digital assets ecosystem encompasses everything that exists in the crypto space – DLT/blockchain technology platforms and many different types of digital assets – Bitcoin, Ethereum, stablecoins, NFTs, smart contracts, ETFs, derivatives and other products and services. Panelists discuss their point of view on this landscape and how they are navigating through it. What role should digital assets play in investment Portfolios?

Moderator:

Hilary Adams, Head of Business Development and Investor Relations, **Hivemind**

Panelists:

Matthew Sigel, Head of Digital Assets Research, **VanEck**

Seth Ginns, Head of Liquid Investments, Managing Partner, **CoinFund**

Utkarsh Ahuja, Chief Investment Officer, Managing Partner, **Moon Pursuit Capital**

AGENDA OUTLINE

12:30 PM PT

Networking Luncheon

Sponsored by: **OXCART**

1:30 PM PT

Critical AI Infrastructure: Tapping into the Compute power of Consumer Hardware

Speakers:

David Stout, Founder, AI Scientist, CEO, **webAI**

Larry Covert, Co-Founder, Managing General Partner, **Oxcart Ventures**

2:00 PM PT

AI Venture Investing

This panel explores the current venture landscape for investing in AI. Panelists discuss how they identify the best managers, portfolio companies, investment trends and sectors. Discussions also include fundraising environment, portfolio construction, exit opportunities and case studies.

Moderator:

Gina Joseph, Chief Strategy Officer, **VentureBeat & GamesBeat**

Panelists:

Sarah Moyer, Vice President, **Jasper Ridge Partners**

Jessie Jia Guo, Investment Partner, **Next Legacy**

Abhishek Sud, Senior Investment Director, **Applied Ventures, LLC**

Tim Suzman, Managing Partner, **Pioneer Fund**

2:45 PM PT

Strategies on Tax Optimization

Join ExperityCPA for an in-depth exploration of advanced tax planning strategies tailored for appreciated assets, equity holdings, and other portfolio income. Their presentation will delve into cutting-edge techniques for strategic tax deferral and reduction. Discover how these sophisticated tools can optimize your tax outcomes and enhance your financial strategy. Gain actionable insights and learn how to effectively implement these methods to maximize your tax efficiency and wealth preservation. Don't miss this opportunity to elevate your tax planning game with their expert guidance.

Presentation:

Jonathan Bander, Partner, **ExperityCPA**



AGENDA OUTLINE

3:00 PM PT

PM Networking Break

Sponsored By:



3:30 PM PT

Unleashing the Power of Blockchain: A Roadmap for Investors

This panel will delve into the current state of the blockchain industry, exploring emerging trends, regulatory developments, and investment opportunities. Experts will share insights on how investors can navigate this rapidly evolving landscape and capitalize on the potential of blockchain technology.

Moderator:

Brendan D. Gundersen, Managing Director, Institutional Business Development, VanEck

Panelists:

Ray Wu, Managing Partner, Alumni Ventures (AV)

Shaan Mehta, Vice President, Private Equity, Stepstone Group

Drew Myers, Managing Partner, CrossLayer Capital

Chris Kelly, General Partner, Kelly Ventures

4:15 PM PT

Family Offices on the Forefront

This panel will focus on how family offices are taking advantage of the new frontier in Blockchain & AI. Experts will discuss strategies for identifying promising fund managers and direct investment opportunities while managing risk and building a diversified investment portfolio.

Moderator:

Bijan Foroodian, Advisor, Family Office

Panelists:

Yiwen Li, Head of Venture, Bayview Development

Erick Gorodezky, VP – Alternative Investments, Talipot*

Anastasiya Giarletta, Partner, R42 Group

5:00 PM PT

Closing Cocktails

Sponsored By:



THE AI & BLOCKCHAIN INVESTMENT CONFERENCE



An aerial photograph of a city at dawn. The city is visible in the bottom left corner, with its buildings and streets. A thick layer of fog or low clouds covers the rest of the landscape. In the center, a radio tower stands out against the horizon. The sky is a mix of blue, orange, and pink, indicating the time is either sunrise or sunset. A semi-transparent grey rectangle is overlaid on the right side of the image, containing the text "PARTICIPATION OPTIONS" in white, uppercase letters.

PARTICIPATION OPTIONS



PARTICIPATION OPTIONS

COMPLIMENTARY

We only invite allocators at no cost. We use ILPA standards for determining who is invited. The complimentary passes are for institutions (and individuals within those institutions) who invest or intend to invest in a portfolio of private equity funds or direct investments primarily for their own account.

To be eligible, an applying organization must meet the following criteria:

- Organization is actively investing in private markets as an institutional investor through any limited partner (LP) vehicle including funds, fund of funds and co-investments.
- Organization primarily invests captive/passive capital.
- Organization does not raise external capital, charge asset management fees, charge promote, and is not a service provider.

Groups that may qualify include:

Public Pensions, Corporate Pensions, Pension Consultants/OCIOs, Superannuation Funds, Foundations, Sovereign Wealth Funds, Endowments, Hospital Systems, Insurance Investors, Single Family Offices, Multi Family Offices, RIAs & UHNWI Investors.

To apply to attend as an allocator, please email:
carmo@carmocompanies.com

INDIVIDUAL PASS

• Standard Pass

- 1 pass to full conference, event cocktail hours and networking sessions.
- *Attendee list Not included*

~~Early Bird: \$1,700 USD~~ **Ends July 26th**

~~Pre-Registration: \$2,200 USD~~ **Ends August 23rd**

~~Standard: \$2,700 USD~~

• VIP Pass

- 1 pass to full conference, event cocktail hours and networking sessions.
- *Attendee list included and shared 1 week prior to the event*
 - *List includes specific attendee allocation information and appetite. Contact information not included.*

\$6,600 USD **Ends September 4th**

PARTICIPATION OPTIONS

ATTENDEE LIST SPONSORSHIP (7)

- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
 - Pre-event email intros/ Carmo meeting facilitation *NOT* included.
- **Stand (Optional)**
 - Sponsor may choose to have 10' x10' space in networking area to distribute marketing material and present information regarding company.
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.

\$10,000 USD

WORKSHOP SPONSORSHIP (3)

- **Workshop**
 - Client to host an intimate 20 minute workshop during networking breaks or lunch on topic of choice. Perfect for Niche Strategies!
 - Workshop invitation and detailed information will be individually distributed by Carmo to all attendees 1 week prior to the event.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Client's Workshop Topic and logo to be branded at scheduled time on the agenda.

\$15,000 USD



PARTICIPATION OPTIONS

MIXER SPONSORSHIP (2)

- **Cocktail/Mixer**
 - Client to exclusively sponsor and host a pre-event or post-event cocktail party.
 - Carmo will invite entire conference audience to mixer.
 - Carmo to coordinate all logistics including badges, rsvp's, food and beverage.
 - Cocktail can be at client offices, venue or elsewhere.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
 - Pre-event email intros/ Carmo meeting facilitation *NOT* included.
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
 - Unlimited company passes to mixer
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns and cocktail

\$15,000 USD

CAP-INTRO SPONSORSHIP (7)

- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$15,000 USD

PARTICIPATION OPTIONS

SPEAKING SPONSORSHIP(10)

- **Speaking Position**
 - Client may choose to speak, moderate or present on panel of choice at event of choice during one of main sessions.
- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$17,500 USD

PRESENTATION SPONSORSHIP (2)

- **Presentation**
 - Stand-Alone 30 Minute presentation at time of choice during main sessions.
 - If slot unavailable, Carmo may adjust event schedule to fit time presentation at time of choice. Perfect for Niche Strategies!
- **Meeting Facilitation**
 - Select targeted LP/GP attendees from Event
 - Carmo will professionally introduce via email and help arrange one on one meetings at the event.
 - Carmo to put best effort of obtaining at least 10 LP/GP meetings with client and prospective LPs.
- **Attendee List**
 - Exclusive access to updated conference attendee list before, during and after the event. Attendee list includes companies, names, professional titles, profiles and specific attendee allocation information
- **Private Table**
 - Sponsor entitled to a private table in the sponsor lounge a quiet setting reserved for pre-arranged, confirmed meetings
- **Passes**
 - 3 Company passes to full conference, event cocktail hours and networking sessions.
- **Branding**
 - Sponsorship branding throughout meeting, agenda and marketing campaigns.
 - Entitled to a Full-Page Advertisement in conference brochure

\$27,500 USD

PARTICIPATION OPTIONS

EXCLUSIVE TITLE SPONSORSHIP (1)

- **Priority Brand Placement & Material Distribution**
 - Sponsor's Corporate logo to be placed above and in a larger format on the conference brochure, agenda, website, banners and branded event advertisements
 - Any research or marketing materials will be made available and/or distributed to all conference attendees.
 - Sponsor to include a full-page advertisement to be placed on back cover of conference brochure.
 - Sponsor logo and link to sponsor site to be included on a bi-weekly newsletter which will update all confirmed and prospective attendees of event progress.
 - Sponsor to have all attendee lanyards with company logo.
- **Exclusivity**
 - First access to conference attendee list 3 weeks prior to the event.
 - Carmo will provide one on one introductions via email to all prospective clients of choice (funds/investors).
 - On-site direction and introduction facilitation to prospective clients
 - Dedicated private sponsor room for 1 on 1 meetings

- **Exclusive Sponsor Cocktail/Dinner**
 - Carmo to help facilitate private cocktail party/dinner with selected investors night before the event
- **Speaking/ Moderating Positions**
 - 2 Moderating/speaking or presentation positions on panel of choice. (first come first serve basis)
- **Company & Speaker Profiling**
 - Company description to be published online and in print (150 words max)
 - Speaker bio to be published online and in print (150 words max)
- **Conference passes**
 - Up to 10 attendee passes for sponsor employee executives

\$50,000 USD



Carmo Companies is a New York based institutional capital introduction consulting firm and professional conference organizer. We work with the most reputable real estate and private equity related operating platforms to establish capital raising relationships with leading private equity funds, institutional investors and private wealth groups located in the Americas and emerging market countries.

Roy Carmo Salsinha
President & CEO
T: +1-646-688-3375
roy@carmocompanies.com

Catherine Correia
VP, Real Assets
T: +1 646-688-3205
catherine@carmocompanies.com

Flavia Correia
Associate, Investor Relations
T: +1-646-688-5277
flavia@carmocompanies.com

Heriberto Acevedo
VP, Private Markets
T: +1 516-717-0016
heriberto@carmocompanies.com

Erick Cruz
SVP, Private Markets
T: +1-646-688-5327
erick@carmocompanies.com

Renato Ferreira
VP, Private Markets
T: +1-516-893-2007
Renato@carmocompanies.com

Nicolás Rodriguez
Investor Relations, LATAM
T: +1-646-688-3363
nicolas@carmocompanies.com

Melissa Ribeiro
Associate, Real Assets
T: +1-516-726-4447
melissa@carmocompanies.com

Alisson Pena
Associate, Investor Relations
T: +1-646-688-3375
alisson@carmocompanies.com

Vanessa Barbosa
Investor Relations, EMEA
T: +1-646-688-3375
vanessa@carmocompanies.com

Carla Gallardo
Investor Relations, EMEA
T: +1-646-688-3375
Carla@carmocompanies.com

Joseph Germain
Advisor
josephgermain@comcast.net



THANK YOU

49 HUNTINGTON BAY ROAD
HUNTINGTON, NY 11743
www.carmocompanies.com

