

## SPEAKERS AT ACG'S CAPITAL CONNECTION 2023



### **ALICE WANG**

Investor Global PE -  
APG Asset Management

Alice is an investor on the Global Private Equity team at APG Asset Management, which invests on behalf of Dutch pension funds across 4.8mm participants totaling ~€541BN of AUM (as of July 2023). The Global Private Equity team focuses on investing across funds, co-investments and secondaries strategies. Alice is part of the founding team of the in-house secondaries strategy, focused on sourcing, evaluating, and transacting across both GP-led as well as LP portfolio secondaries transactions.



### **ANGIE LAMARSH**

Head of Sustainable Finance,  
Commercial Banking - HSBC  
Bank Canada

Angie is the Head of Sustainable Finance, Commercial Banking at HSBC Bank Canada, where she is responsible for leading the business's sustainability proposition in Canada and executing HSBC's global commitment to provide at least USD 750 billion in sustainable finance by 2030. Under Angie's leadership, HSBC has developed the largest sustainable finance product suite in Canada and has focused on ensuring businesses of all sizes are able to access the capital they require to successfully transition their operations to thrive in a low-carbon economy. Angie's background is in large corporate banking, and she has experience leading diversified complex portfolios of public and private companies. She currently serves as the Chair of the Board of Governors at Simon Fraser University and as a Board Director at Windmill Microlending. Angie was recognized by Business in Vancouver as one of the Top Forty Under 40 in 2022 and was selected as one of the Top 100 Most Powerful Women in Canada by the Women's Executive Network (WXN) in 2019.



### **BROOKE THIESSEN**

Partner, Infrastructure & Capital  
Projects Advisory

Brooke specializes in both M&A and post-closing strategy for our Infrastructure private equity clients. She has over 5 years of experience in portfolio management at Brookfield Infrastructure Partners. Brooke joined Deloitte in 2019 and has focused on M&A advisory, including buy-side and financial due diligence, largely in the power and utility and transportation space in North America and Europe. Additionally, Brooke leads our Canadian ESG M&A practice for private equity and corporate clients. She has supported large private equity based in North America on ESG diligence, integration and strategy. Prior to joining Deloitte, Brooke was a Vice President of Portfolio Management at Brookfield Infrastructure Partners. She focused on operational due diligence and post-closing integration for the global Infrastructure portfolio. Specifically, she developed and implemented value creation programs to manage operational risk, drive accretive value, and track organic and inorganic growth initiatives against base case expectations. She worked directly with executives at operating businesses to drive underwriting expectations and initiatives. Brooke's responsibilities covered assets in North America, Europe, South America, Australia and Asia, with a focus on South America and Asia. During her time at Brookfield, Brooke formalized an end-to-end ESG strategy for the Infrastructure group, including incorporating ESG into the diligence, underwriting and Investment Committee processes, integrating ESG considerations into portfolio company management, and supported fundraising efforts and LP inquires for co-investment opportunities. Brooke has spent considerable time with global LPs discussing ESG strategies and understand the key areas of focus. Prior to joining Brookfield, Brooke was a Manager in Deloitte's Assurance & Advisory practice. Brooke holds her CPA, CA.



### **CLAIRE FAN**

Economist - RBC

Claire Fan joined RBC as an economist in 2019 after obtaining her Master's degree in Financial Economics from Western University. In her role she focuses on macroeconomic analysis for Canada and the United States, and covers key areas including growth and inflation projections, labour market and demographics trends and related discussions on monetary policy. In her free time she enjoys cooking and trail running with her dog.



**COLIN DEEKS**

Senior Consultant - Prime  
Quadrant

Colin Deeks is a Senior Consultant at Prime Quadrant where he provides investment consulting advice and serves as a trusted advisor to families. Prior to joining, Colin was a Senior Director at a Toronto-based single family office where he oversaw all aspects of the investment process across multiple capital pools. Colin has a diverse background in Financial Services spanning nearly 18 years, including private wealth management, corporate development, transaction services and capital allocation throughout Europe and North America. Colin has an Honours Bachelor of Arts from Queen's University and is a Chartered Investment Manager (CIM®) with the Canadian Securities Institute. Colin is active community member outside of work and coaches hockey, soccer and baseball for his two young boys. He is a member of the Leadership Advisory Development Council (LDAC) at Capitalize for Kids and previously served as Treasurer for his children's school and as a Director of Rosedale Golf Club. Colin enjoys spending time with his family is an avid golfer, cyclist and skier.



**DANIEL LEE**

Managing Director -  
Global Investment Banking

Daniel Lee focuses on advising founders, management teams and shareholders of technology companies on strategic transactions such as M&A, recapitalizations, and growth equity raises. Daniel has 15 years capital markets experience working with companies across a variety of technology sub sectors including Enterprise Software, SMB SaaS, FinTech, Digital Media, and AdTech.



**DAVID LAMP RON**

Principal - Persistence Capital Partners

David joined Persistence Capital Partners in 2018 and is responsible for evaluating investment opportunities, executing transactions, and supporting the management teams of portfolio companies. Prior to PCP, David was Vice President, Investment Banking at DNA Capital, where he advised clients on several M&A and private placement transactions across numerous sectors.



**DAWN DESJARDINS**

Chief Economist -  
Deloitte Canada

Dawn Desjardins is an economist and executive with experience in researching economic and policy issues. Over her career she has communicated complex issues to clients, decision-makers and media audiences. She was RBC's Deputy Chief Economist, a reporter for Bloomberg Financial News in Canada and a bond strategist at JP Morgan Canada. At RBC, Dawn managed a team of economists who were responsible for the economic and financial market forecasts for Canada and the US. A passionate advocate of women's labour market engagement, in recent years, Dawn used her research to start conversations, drive policy discussions and effect change.



**EVAN BENNITT**

Senior VP & Head, BMO Sponsor  
Finance - BMO

An experienced finance professional with strong financial analysis and credit structuring skills built over a 20+ year career in mid-market leveraged lending. Broad lending experience, having spent time in roles accountable for deal origination, relationship management, deal structuring and execution, portfolio management, credit risk management and workout functions. A proven team leader with a demonstrated ability to make complex, critical decisions



**FRANK ARNONE**

Partner - Cassels Brock  
& Blackwell LLP

Frank Arnone is a partner in the Business Law Group at Cassels Brock & Blackwell LLP, serving as Co-Chair of the firm's Private Equity Group. Frank's practice emphasizes domestic and cross-border mergers and acquisitions and corporate finance for a wide variety of issuer, underwriter, and private equity clients. Frank offers extensive experience working on complex transactions in a wide range of industry sectors. He also provides ongoing advice on securities law, stock exchange compliance, and corporate governance matters. Frank has written extensively on a wide variety of private equity, corporate finance, and securities topics including corporate governance, and was a contributing editor of Federated Press' Corporate Financing Journal. For his work, Frank is noted as a leader in his field by Best Lawyers, Lexpert, Who's Who Legal, and IFLR.



**GIL NAYOT**

Partner - Vertu Capital

Gil is a Partner of Vertu Capital, a Toronto-based technology private equity firm focused on providing a local solution for Canadian entrepreneurs and businesses looking for a globally experienced private equity partner to help scale to the next level. Prior to Vertu, Gil led the technology vertical for CPP Investment's private equity team. Gil also worked at Lake Capital Partners, a mid-market private equity firm based in Chicago, where he focused on investing in the technology and business services sectors, and worked at Bain & Company in both Chicago and Singapore. Gil sits on the boards of Dejero and Pathfactory, and previously sat on the board of Informatica (NYSE:INFA). Gil holds an MBA from the Kellogg School of Management at Northwestern University, a Bachelor of Engineering Science from the University of Western Ontario and a Bachelor of Arts in Honors Business Administration from the Richard Ivey School of Business.



**GORDON RAMAN**

Mergers & Acquisitions and  
Corporate Governance Partner -  
Fasken LLP

Gordon Raman's practice focuses on mergers and acquisitions, corporate governance and capital markets. As part of his corporate governance portfolio, Gordon is Chair of Fasken's ESG and Sustainability Practice, which brings together lawyers from interdisciplinary practices to provide comprehensive advice to clients on ESG related issues. He works with clients in a broad range of industries, including automation and technology, private equity, financial services, real estate and engineering and construction. Gordon is known for bringing clarity to complex issues in helping clients with their strategic goals and business decisions. Gordon advises senior management and boards of public and private companies in M&A transactions including take-over bids, plans of arrangements, and share and asset acquisitions and dispositions. He also advises boards and special committees on corporate governance matters, including ESG considerations. In addition, Gordon advises issuers, underwriters and investors in capital markets transactions of equity and debt securities, including high-yield securities. Gordon has taught a corporate law course at Osgoode Hall Law School as an adjunct professor and has co-taught an M&A course at Western Law. Gordon has written numerous articles in the areas of M&A, corporate governance and corporate finance. As part of his MBA studies, he completed an exchange program at Ecole Supérieure de Commerce de Paris in France.



**GRAEME BLAIR**

Director of M&A - RBC

Graeme Blair is Director of M&A within Royal Bank of Canada's mid-market Sustainable Finance Group. He works closely with RBC clients who view Environmental, Social and Governance (ESG) factors as an essential part of their corporate strategy and investment decision-making process. He has over two decades of experience in capital markets and has advised and executed on various M&A, recapitalization, growth capital and financing mandates. He has also spent time as a venture-capitalist helping to finance early stage companies and as a corporate lender. Graeme holds a Bachelor of Political Studies from Queen's University and an MBA from the University of Toronto's Joseph L. Rotman School of Management and serves as National Co-Chair of RBC's CCG Diversity and Inclusion Committee.



**GREG MASHINTER**

Partner - Peloton Capital Management

Former Director in TPC's Financial Services team at OTPP, starting his career there as an Analyst in 2006. During his 16-year tenure at OTPP, Greg developed extensive experience in deal sourcing, investment analysis, transaction execution and portfolio value creation. Greg's deep portfolio company experience includes roles on the boards of Canada Guaranty Mortgage Insurance Company, First American Payment Systems, Allworth Financial, SeaCube Container Leasing and Lancaster Aircraft Leasing. He was also actively involved in a number of other direct equity investments, including Heartland Dental, INC Research, NXT Capital, BroadStreet Partners, and HomeEquity Bank. Greg holds a Bachelor of Business Administration (Honours) degree from the Schulich School of Business at York University and is a CFA charter holder. Greg lives in Toronto with his wife and young twins, is an avid golfer, hockey player, mountain biker and a self-proclaimed beer connoisseur.



**JAMIE CARTWRIGHT**

Partner - Novacap

Jamie Cartwright holds a Bachelor of Economics degree as well as a Bachelor of Managerial and Organizational Studies from the University of Western Ontario. He is also, a Chartered Professional Accountant (CPA, CA) and a Chartered Insolvency and Restructuring Professional (CIRP). Prior to joining Novacap, Mr. Cartwright worked at The Stronach Group as Executive Vice President, Corporate Operations, where he was responsible for the management and operations of a diverse portfolio of companies located throughout North America. Previously, Mr. Cartwright was Vice President, Corporate Advisory and Restructuring at PwC. He led large and complex restructuring engagements involving operational restructuring, refinancing and recapitalization of debt and equity, as well as negotiations with creditors, banks and investors.



**JAMIE EARLE**

Director - Roynat Equity Partners

Jamie Earle is a Managing Director at Roynat Equity Partners, a Scotiabank owned, middle market focused private equity team, where he leads the Toronto office. He is responsible for all aspects of the investment process from origination, analysis, execution, and ongoing management of opportunities. He has over 15 years experience in finance with an emphasis on Private Equity and has held a leadership role in a privately held mid-market health care company, providing strategic and operational direction to drive growth in the business. Jamie is a Chartered Professional Accountant and holds a BCOMM from Queens University



**JENNIFER PEREIRA**

Managing Director, Private Equity - Fengate Asset Management

Jennifer is a Managing Director at Fengate Private Equity, a division of Fengate Capital Management. Jennifer's responsibilities include investment decision-making, management of Fengate's private equity funds, strategy, operations, and investor relations. Prior to joining Fengate in 2023, Jennifer was with CPP Investments for almost twelve years, most recently acting as Managing Director, Private Equity, leading coverage in the consumer sector. Prior to CPP Investments, Jennifer worked as a management consultant at the Boston Consulting Group where she advised a broad range of clients with a focus on financial institutions and consumer companies. Jennifer holds an MBA from the Wharton School of Business and a B.A.Sc in Engineering from the University of Toronto. She has served as a director on the board of Petco Health and Wellness and the board of Ultimate Kronos Group and was an observer on the boards of Merlin Entertainments and Seven Generations Energy.



**JONATHAN KHAN**

Relationship Director - National Bank Financial Markets

Based in Toronto, Jonathan Khan is Director, Lending Origination with National Bank's National Client Group (NCG). Partnering with Canadian entrepreneur-led and sponsor-backed companies, NCG leads senior credit facilities and provides working capital financing through National Bank's Accounts Receivable Factoring practice. Prior to joining National Bank, Jonathan spent 6 years as a leader with HSBC's Receivables Finance and Scotiabank's Supply Chain Finance businesses, where he advised Fortune 500 clients implementing working capital optimization programs. Jonathan started his career at Scotiabank in Corporate Credit and Loan Portfolio Management.



**JOSEPH LO**

Partner - Sagard

Joseph Lo is a Partner at Sagard and a member of the Sagard Private Equity Canada (SPEC). He is responsible for originating, structuring, investing and portfolio management. He is a member of the Sagard Private Equity Canada investment committee and leads SPEC's Toronto office. Prior to joining Sagard, Jo was a Partner in PwC's Value Creation practice where he also served as the firm's Deals Private Equity Leader. In this role, he worked with corporate, private equity and portfolio company clients through all stages of the deals lifecycle. Previously, Jo served as a sponsor-backed CEO in healthcare and multi-site consumer retail. Earlier, he was an executive at BCE, where he spent a decade in senior operating roles. Jo began his career at Kearney where he advised clients on matters of strategy and operational effectiveness. Active in the community, he serves on the boards of Canadian Club Toronto (Past-President), Harvard Business School Club of Toronto (Past-President), Scarborough Health Network, Canadian Sport Institute of Ontario and is a member of the Young Presidents Organization.



**JOY SAVCHENKO**

Senior Managing Director - Evercore

Ms. Savchenko is responsible for developing investor relationships and originating and advising clients on a variety of private capital transactions. She has extensive experience in the private markets, advising on a broad range of capital raises and liquidity solutions. She has represented private equity and hedge fund managers on capital raises, single asset deals, fund recapitalization, tender offers and spinouts, as well as represented public pensions, endowments, foundations, financial institutions and family offices on strategic sales. Previously, Ms. Savchenko spent 19 years at UBS working with institutional clients in a variety of advisory roles, most recently in the private funds group, covering institutional investors in the United States and Canada, with a focus on origination. Prior to that role, she executed secondary market transactions for nearly a decade and worked in the M&A and strategic solutions groups. Ms. Savchenko earned a Bachelor of Science in international economics from Georgetown University's School of Foreign Service.



**KRISTIN SHEARER**

Director - Northleaf Capital Partners

Kristin participates in the origination, evaluation and monitoring of Northleaf's private equity investments, with a focus on secondaries. Northleaf is a global private markets investment firm with approximately \$22 billion of assets under management across its private equity, private credit and infrastructure programs. Prior to joining Northleaf in 2015, Kristin was a Manager, M&A Transaction Services, at Deloitte LLP where she performed financial due diligence for private equity and strategic buyers on a variety of M&A transactions. Kristin received a Bachelor of Commerce (Honours) from the University of British Columbia and holds the Chartered Professional Accountant designation.



**LINDSAY BALSON**

Partner -  
Blake, Cassels & Grayson LLP

Lindsay Balson is a Partner at Blakes whose transactional practice focuses on private equity, fund investments and mergers and acquisitions. She advises clients on complex Canadian and cross-border transactions and routinely provides advice to both sponsors and pension funds and other institutional investors on their private equity, infrastructure, real estate, hedge fund and other investments. In addition to her transactional work, Lindsay's experience includes advising clients on corporate and commercial arrangements, including reorganizations and other corporate restructurings, and complex shareholder, partnership, joint venture, and other commercial agreements. Lindsay's experience spans multiple industry sectors, including life sciences, energy, technology, manufacturing, food, beverage and agribusiness, and retail sectors, among others.



**MARGARET WU**

Lead Investor - Georgian

Margaret Wu is a Lead Investor at Georgian focused on business software companies exploiting Applied AI. Prior to Georgian, she was a Product Manager for mobile marketing at Amazon, co-founded a biotech company and served as COO at OneSpout, a local e-commerce startup. Margaret began her career in consulting at Accenture and holds an MBA from Cornell University, as well as a BSc and BES from the University of Waterloo.



**MARK HORROX**

Principal - Third Eye Capital

Mark is an expert in debt restructurings and special situations investing. He has been a Principal at Third Eye Capital (TEC) since 2014, and is responsible for deal origination, due diligence, structuring and closing, investment monitoring and servicing, workouts, harvests, and exits. Over the last few years, he has been active in developing carbon reduction strategies for conventional energy companies within TEC's portfolio. Previously, Mark was a senior investment manager at a large distressed private equity manager and a senior analyst in the special situations group of one of the largest macro hedge funds. Mark holds a Master of Business Administration from the London Business School.



**MARK REDINGER**  
Partner  
Dickinson Wright

Mark is a partner with Dickinson Wright in Toronto with the Banking and M&A Groups. His practice focuses on corporate finance, mergers and acquisitions, structured finance, derivatives transactions, cross border and international transactions. He has extensive experience and a particular interest in working with early and late stage entrepreneurs in both start-up and life-cycle transactions. He has also advised funds, private equity, institutional investors and financial institutions and has completed listings in several international markets including the London Stock Exchange and the Irish Stock Exchange. Mark's approach to the law is to offer clients practical, pragmatic and innovative solutions to legal issues to achieve business objectives. Mark was previously in-house counsel and strategic advisor to a synthetic GIC platform in the United States and an internal advisor to several projects in the structured debt market including regulatory capital and distressed assets. Prior to returning to Canada, Mark practiced overseas in the offices of a major international law firm specializing in structured finance solutions for institutions and private firms. In 2008 he was seconded to New Delhi, India to assist with that firm's development of the Indian market. Mark has maintained his interest in emerging markets by acting for parties that are actively engaged in exploring opportunities in emerging economies.



**MARTHA TREDGETT**  
Managing Partner -  
Private Capital Advisory

Martha Tredgett, Managing Partner, joined Brookfield Financial (recently renamed Sera Global Advisory) in October 2020 to lead the Private Capital Advisory coverage within Canada and has over 25 years of experience in the investment business combining equity capital markets, business development and investment banking. Ms. Tredgett joined Sera after working with LGT Capital Partners, a provider of alternative investment solutions. Previously, she served as a Managing Director for a division of Bear Sterns/JP Morgan in Toronto, working with leading institutional investors, global private equity funds, secondary funds, real assets and hedge funds. Earlier in her career, Ms. Tredgett worked as a Director & Vice President in Institutional Equities at UBS & Credit Suisse First Boston respectively, in London, Paris & New York. Ms. Tredgett is currently serving on the Investment Committee of the Perimeter Institute and the Toronto Community Housing Corporation, and was recently on the Board of Directors and Audit Committee for SOAR Technology Acquisition Corp.



**MATTHEW SEGAL**  
Managing Director - Banyan

Matthew is Managing Director at Banyan where he is responsible for originating, evaluating and executing transactions as well as managing multiple portfolio companies. Prior to joining the firm in 2019, Matthew was a Partner at Hawthorn Equity Partners (formerly Genuity Capital Partners) where he sourced and led transactions, provided support and guidance to portfolio companies and was involved in all aspects of fund management. Prior to that, Matthew was with Teachers' Private Capital and, earlier in his career, Mercer Management Consulting (now Oliver Wyman).

Matthew has a Bachelor of Arts (Honours, Economics) from Queen's University and an MBA from Harvard Business School. Matthew is currently the Chairman of the Board of Directors for MIP and Innovative Surface Solutions.



**MICHAEL BLACK**  
Partner - RICHTER

Michael is a strategist who works directly with boards and executive teams in corporate and growth strategy, business planning, commercial diligence, market studies, and go-to-market planning. Michael has a proven ability to identify future growth levers to achieve a competitive advantage and enhance organizational performance. Ultimately, Michael seeks to create value – not only for a company's shareholders, but for all its stakeholders. Michael has advised clients in numerous industries: pharmaceuticals and life sciences, public sector, private equity, TMT, industrials and manufacturing. Michael's style is rooted in pragmatism to reflect his belief that strategic planning should align the organization behind a common goal that is ambitious, yet achievable. His holistic approach aims to ensure that client's receive forward-thinking solutions that are supported by key implementation enablers to create a clear execution roadmap.



## **MICHAEL BOWMAN**

Managing Director, Global  
Private Markets - Northleaf  
Capital Partners

Michael is actively engaged in supporting the distribution of Northleaf's private markets strategies to retail, private wealth and asset management advisors and investors. Previously, Michael was a Managing Director, Private Equity, and participated in the origination, evaluation and monitoring of Northleaf's private equity co-investments and direct secondary investments. Prior to joining Northleaf in 2016, Michael was a Vice President, Corporate Development at Brookfield Global Integrated Solutions, where he was responsible for developing and leading all strategic acquisitions and development of internal Brookfield Asset Management account relationships. Previously, Michael spent four years at Centric Health Corporation where he was a Vice President, Operations of the Western Surgical Division and a Director, Business Development Mergers & Acquisitions. Michael began his career in PricewaterhouseCoopers' audit and assurance group in 2004. Michael received an Honours Economics degree from Queen's University and completed the Masters of Management and Professional Accounting (MMPA) program at the Rotman School of Business. He holds the Chartered Professional Accountant designation.



## **MICHELLE MCBANE**

Managing Director - StandUp Ventures

Michelle is passionate about working with amazing technology entrepreneurs applying disruptive technologies to solve problems in enterprise, health and consumer markets. Michelle is a skilled business professional with many years of combined operational and venture capital experience. Her background includes 16 years of venture capital investing early- and later-stage companies in ICT and Health, managerial and product development experience as well as sales and marketing roles in both engineering and scientific industries. Michelle co-founded StandUp Ventures in 2017, and leads investments in early-stage companies health and technology companies. Michelle is currently on the Board of Directors of several companies as a Board member or Observer and these include Sampler, tealbook, ODAIA, StoryTap, Emovi, MiMS & Acerta. She is also an investor in Figure1, Maple, Rank & Rubikloud who have raised substantial follow-on financings. Past exits include Cytochroma (acquired by OPKO) and Locationary (acquired by Apple). She is also a Board Member at the CVCA and co-chairs the CVCA D&I Committee.



## **MIKE MORREALE**

Commissioner and Co-Founder  
- Canadian Elite Basketball  
League

Mike Morreale's visionary leadership of the Canadian Elite Basketball League stems from his extensive experience as a professional athlete, head of a professional players union, broadcaster, community leader, and successful business executive. That breadth of experience, along with people-first core values, has enabled Morreale to form a strong foundation for Canada's largest professional domestic league of any sport in less than five years. Under Morreale's leadership the CEBL has established itself as among the best of the pro basketball leagues around the world. It is the top FIBA league in the world playing during the spring and summer months, drawing players with experience in the NBA, NBA G League, other top international pro leagues, and with leading NCAA and U Sports programs. Morreale was a standout receiver for 12 seasons in the Canadian Football League, eight with his hometown Hamilton Tiger-Cats and four with Toronto. He was a member of Grey Cup champion teams in 1996 and 1999, earning Grey Cup Canadian MVP honours in 1999. The McMaster University graduate also earned the CFL's Most Outstanding Canadian award in 1998, and the Tom Pate Award for outstanding sportsmanship and contributions to his team and community in 2000.



## **NATHALIE COOK**

Chair - Commercial Women's  
Sports Advisory Group

Renowned for her innovative and inclusive management approach, Nathalie Cook oversaw a broad portfolio of multimedia sports assets for TSN and RDS and was one of the first women to lead a sports network in North America. She was instrumental in making NBA history with the Raptors first all-female broadcast crew to call the game against the Denver Nuggets. Historically, Nathalie has played an integral role in shaping strong, strategic and empathetic change management and demonstrated operational leadership within complex structures, successfully building and managing teams and business portfolios. Previously, she was part of the leadership team delivering the 2010 and 2012 Olympics for the Olympic Broadcast Media Consortium; was a key revenue driver through creative partnerships; and has been an advocate of gender equity in sport, most recently as Chair of Canadian Women and Sports (CWS) advisory group. Their recently issued white paper "It's Time" showed that Women's professional sport is ripe for investment. It offers a unique and strong value proposition for investors in Canada, particularly those with a venture capital mindset. Recently retired from corporate life, Nathalie has been working as a Strategic Advisor to Project 8 as they work to bring Canada's first professional women's soccer league to life. A bilingual Montreal native, Nathalie's career versatility has given her deep exposure in an industry where she has few peers.





**NITIN GUPTA**

Managing Partner -  
Flexstone Partners

Based in New York, he leads US investments, and is a member of the Global Advisory Investment Committee, and the US Investment Committee. Nitin joined Caspian Private Equity, a predecessor to Flexstone Partners, in 2008. He serves as a Board member/observer for several portfolio companies of funds managed by Flexstone Partners.



**PARASVIL PATEL**

Partner - Radical Ventures

Parasvil Patel is a Partner with Radical Ventures where he works with entrepreneurs building and deploying AI technologies. Prior to joining Radical, Parasvil was with KKR and started his career with BCG. Parasvil holds an MBA with High Distinction from Harvard Business School and received a B.Tech. in Electrical Engineering from IIT Bombay



**PEDRAM KAYA**

Director Corporate Finance -  
MNP Corporate Finance Inc.

Pedram advocates for, and assists clients in formulating and accessing innovative and strategic financing solutions that help realize and fully execute growth opportunities, refine & optimize capital structures, enable strategic transformations and unlock shareholder value. Pedram has cumulatively deployed and/or managed more than C\$1 billion of debt capital over his 15 year career in corporate and commercial banking, credit structuring & underwriting, and portfolio & risk management. Pedram has presided over complex credit transactions in diversified industries, mortgage & lease finance, and has transacted with both publicly traded companies with international operations and locally operated privately-held businesses. Pedram has had experience across the full spectrum of credit risk, having underwritten deals with high leverage and volatile/growing/cyclical cash flows & earnings. Pedram is a Chartered Professional Accountant (CPA, CA) and holds a Bachelor of Commerce degree from the Rotman School of Management (University of Toronto) and a Masters of Business Administration from the Schulich School of Business (York University), specializing in Strategy and Finance.



**PRISCILLA THIAGAMOORTHY**

Senior Economist & Vice  
President - BMO

Priscilla joined BMO Capital Markets in 2016 and plays a key role in analyzing Canadian household trends and the U.S. regional economy. She also contributes to the group's AM Notes and various special reports. Priscilla previously worked at the Bank of Canada in the Financial Markets Department. She holds an undergraduate degree from the Schulich School of Business and a Master's degree in economics from the University of Ottawa.



**SAL GALATIOTO**  
President & Founder -  
Galatioto Sports Partners

Sal Galatioto is the President and Founder of Galatioto Sports Partners, the leading firm in the sports finance and advisory business. For 27 years, he has overseen engagements in more than 125 transactions in the major U.S. professional sports leagues. Prior to forming GSP in 2005, he was Managing Director and head of Lehman Brothers' Sports Advisory & Finance Group, which was founded upon his joining that firm in 2001. In 1993, Sal joined Société Générale and established the Sports Advisory Group in 1997. During his career, Sal has earned numerous accolades for his work and commitment to the industry. In 2010, he was crowned the "King of Sports M&A" by Bloomberg Businessweek and was also named one of the "50 Most Influential People in Sports Business" by the Sports Business Journal. His presence within the industry makes him a frequent speaker at conferences for high net worth investors, such as the Family Office Roundtable, the Family Office Association Summit and TIGER 21. In 2018, he was named one of Sports Business Journal's six "Champions: Pioneers & Innovators in Sports Business" and was honored at the 2018 World Congress of Sports. Sal holds a Masters of Business Administration from the Thunderbird School of Global Management with distinction and high honors and a Masters of International Relations with honors from the Fletcher School of Law and Diplomacy. He graduated magna cum laude from Hunter College with a B.A. in History and was also a Herbert H. Lehman Fellow. In 2009 he was voted into the Hunter College Hall of Fame. In addition, he completed the Northwestern University/Kellogg Graduate School of Management Advanced Capital Markets and Management Program. Since 2002, Sal has served as an Adjunct Associate Professor of Business at the Columbia University Graduate School of Business.



**SHEZ SAMJI**  
V.P. & Head - Technology &  
Innovation Practice at TD

Shez is currently Head of TD's Technology and Innovation practice. Prior to TD, Shez was at SVB, where he oversaw the bank's market-facing efforts and client acquisition strategy across Canada. Shez spent most of his career as an investor, and was a Vice President at Third Eye Capital, Canada's largest private debt and special situations investor. He began his career at BMO Capital Partners, the Bank of Montreal's principal investing division. With more than 10 years of direct private and public market investing experience, Shez's background includes originating, structuring, and executing transactions across the capital structure and in a variety of industries and situations. Shez lives in Toronto with his wife and daughter. Outside the office, Shez serves on the Investment Committee for Community Development Venture Fund, a nonprofit microloan company founded to support entrepreneurship, particularly among immigrants to Canada.



**STEPHANIE MOONEY**  
Director - Business  
Development, Canada &  
US Pacific NW, Trivest

Stephanie joined Trivest in 2020 and is responsible for originating and analyzing acquisition opportunities. Based in Toronto, she manages Trivest's deal relationships across Canada and the Pacific Northwest. Prior to Trivest, Stephanie was a Director with the Canadian Imperial Bank of Commerce (CIBC) responsible for originating and managing lending relationships with privately held middle market companies while leading a team of account managers. Stephanie holds an Honours Bachelor of Commerce Degree from McMaster University. She is a member of the Association for Corporate Growth (ACG) Toronto Chapter's Deal Source Committee and actively participates in Opus Connect, Exponent Women, and various other networking groups. She is involved with a number of charitable organizations including Gilda's Club Greater Toronto where she's been a Board Member since 2019. Outside of work Stephanie enjoys spending time at the cottage, sinking birdie putts, cheering for her favourite hockey teams and has yet to meet a dog she didn't love.



**TESSA BONHOMME**  
Reporter & Anchor - SportsCentre

Olympic gold medalist Tessa Bonhomme is a reporter and anchor for SPORTSCENTRE, Canada's most-watched sports news and information show. A defenceman for the National Women's Hockey Team beginning in 2004, Bonhomme helped Canada win a third straight gold medal at the Vancouver 2010 Olympic Winter Games. She also won gold in the IIHF World Women's Championship in both 2007 and 2012 and silver in 2009, 2011, and 2013.



**THECLA SWEENEY**  
Partner - Alohi Capital

Thecla has spent 18+ years in private equity with an emphasis on growth-oriented businesses. Thecla has been involved with companies in a broad range of industries, including Canada's largest mobility and accessibility business (Motion), specialty toy retailer (Mastermind Toys), leading mattress retailer (Sleep Country Canada), fibre-optic telecommunications providers (Atria Networks and FlexNetworks) and artisan bread manufacturer (Ace Bakery).



**TORI BUFFERY**  
Partner - Morningside Capital

Tori has been a Partner at Morningside Capital since the team came together in 2016. She has been involved in all aspects of the Firm's investment process and currently leads the Morningside Vintage Secondary program, which focuses on single asset continuation vehicles through two co-mingled funds. Prior to joining Morningside, Tori worked in the Funds, Secondaries and Co-Investments team at CPP Investments in Toronto and London. While at CPP, she gained extensive experience in private equity, investing \$5.3 billion in the asset class. Tori also served as a member of the Institutional Limited Partners Association's Education Committee. Tori currently serves on the Board of Urban Squash Toronto, a not-for-profit supporting at-risk youths, and the Finance Committee of the North York Harvest Food Bank.



**TU NGUYEN**  
Economist and ESG Director -  
RSM Canada

Dr. Tu Nguyen is economist and ESG director at RSM Canada. She provides thought leadership on key economic indicators of the real economy and on Environmental, Social, Governance issues. Her commentary has been featured in top media outlets such as Reuters, the Wall Street Journal, CBC, Global News, and CTV. Tu frequently presents at conferences, seminars, and workshops, sharing her expertise with diverse audiences. She is known for her ability to present complex economic concepts in a clear and relatable manner, making economics accessible to all. Tu is dedicated to shaping a future where economic growth and sustainability not only coexist but thrive. She is an environmental economist with cutting-edge quantitative skills and experience in advanced analytics applications, statistics, and survey design and implementation. Her research has been featured in top academic journals and provides invaluable insights for international organizations, government agencies and industry leaders. As part of the ESG team, Tu leads the development of data-based solutions for organizations to improve their ESG performance. Tu holds a PhD in Applied Economics with a focus on Environmental and Natural Resource Economics from Oregon State University, where she became a global leading voice in environmental economics. Before joining RSM, Tu worked as a research economist and university lecturer.



**WILLIAM SAMMONS**  
Partner - PwC

Will is a Partner in our Private Equity & Pensions practice focused on traditional and alternative asset managers, pension plans, and sovereign wealth funds in Canada and globally. He sits within Strategy&, our global strategy consulting capability, and is focused on organic and inorganic growth, enterprise transformation, and digital strategy. Prior to joining PwC, he worked for boutique consulting firms focused on asset and wealth management in addition to industry roles. Will has experience working with clients across the Americas, Europe, and Asia ranging from regional specialty firms through to some of the largest asset managers, asset owners, and service providers globally. The value that Will brings to his clients is his deep industry expertise and his pragmatic approach to problem solving given his experience partnering with clients throughout their transformation journeys. Recent projects include enterprise investment lifecycle transformation, GenAI strategy, market entry, segment strategy, alternative investments expansion, and direct-to-consumer platforms.



**YONG KWON**

Managing Director - Raymond  
James

Yong Kwon joined Raymond James in 2021 and has 20 years of experience in investment banking and private equity. Prior to joining Raymond James, Yong was a Principal at INFOR Financial Group, responsible for Technology and Financial Sponsor investment banking coverage. Previously, Yong was a Partner with Novacap, a Montreal-based private equity firm, where he spent 5 years investing in TMT companies and playing a key role in building out the firm's Toronto office. Yong has prior investment banking experience at global and Canadian investment banks, including Barclays and RBC Capital Markets. Yong earned an MBA from the Rotman School of Management and a Bachelor of Commerce degree from the University of Toronto.