

Unlocking Global Investment Opportunities in the Caribbean's Financial Hub

April 9-11, 2025 | Hotel Indigo Grand Cayman



Wednesday, April 9

Hotel Check In

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

LP ONLY (Pom Pom Rooftop Bar)

GP ONLY (Sapphire Room)

Badge Collection

Between 4:30-5:30 Badge Collection

16:10-16:20

Chair Welcome

Lana Callahan, Managing Director of Investor Relations, Apex Invest

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

16:20 - 16:50

Fireside Chat | Welcome and Introduction to Grand Cayman

Sue Nickason, VP, Dart Family Office
Steve McIntosh, CEO, Cayman Finance

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

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

16:50 - 17:40

Investor Roundtables

AI/data infrastructure
Reinsurance
Real estate
Alternative energy/climate tech
Healthcare
Longevity/grounding
Secondaries
Impact investing
Mental health/therapeutic services

5:30 - Workshop | Structuring for Success: Preparing to Attract Family Office and Institutional Capital

17:40 - 18:10

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

(Moderator) Divya Tandon, Principal and CIO, SJI Properties
Kevin Ernst, Managing Director, Kingswood
Ellen Snibbe Baker, Founding Partner, Baker Aurora
Wei Huang, Senior Vice President, Global Family Office
Carrie Harding, Managing Director, Panthera Private Office; Director, Cayman Islands Family Office Association

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

Anne Storie, Country Head Cayman, Apex Group

18:10 - 19:00

Masterclass | Rum Tasting and Cocktail Making Class

19:00 - 21:00

GPs and LPs Networking Welcome Reception - (Pom Pom Rooftop Bar)

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Thursday, April 10

08:15 - 09:00	Breakfast and Registration
09:00 - 09:05	Opening Remarks and Welcome Georges Archibald, Chief Commercial Officer, Apex Group
09:05 - 09:10	Chair Welcome James Burron, Co-Founder & Partner CAASA
09:10 - 09:40	Panel Session Private Credit and Cross-Platform Investing: Unlocking New Opportunities (Moderator) Mary D'Souza, CIO, Misha Investments Peter Rafferty, CFA, Senior Investment Officer, West Virginia Investment Management Board Brian Skerry, Raptor Group
09:40 - 10:15	Panel Session Redefining Impact and Investment: Evolving Strategies in Philanthropy (Moderator) Josh Roach, Managing Director, Meritage Group Matthew J. Nordgren, Managing Partner, Arcadian Capital Mina Lu, CEO, Victoria's Voice Foundation Sean Coveleski, Senior Vice President - Stand Up To Cancer
10:15 - 11:00	Morning Networking Break and Refreshments
11:00 - 11:30	Fireside Chat Innovating with Purpose - 5-hour ENERGY® to Family Office and Hedge Fund Manoj Bhargava, Founder, 5-hour ENERGY® and TPlus3 Fund
11:30 - 12:00	Panel Session The Shifting Geopolitical Landscape - Impacts on Global Investment (Moderator) Guy Pinkman, Chair, Lincoln Police and Fire Pension and Advisory Committee Member, Pension Benefit Guarantee Corporation (PBGC) Matt Westbrook, Managing Partner, Coalition Ventures Marco Vicenzio, Geopolitical Commentator

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Thursday, April 10

Lunch Break and Specialist Briefings

12:00 - 13:00

Lunchtime Briefing | [Apex Group Women's Accelerator Network](#)
Mirabelle D'Cunha, Growth Accelerator, Mirabelle D'Cunha Integrative Wellness

Lunchtime Briefing | [Masterclass: Blockchain and Crypto – A Long-Term Macro Outlook](#)
Barry Thomas, Partner Managing Director, Forteus
Laurin Bylica, Co-Founder and Managing Partner, N8 Capital

13:00 - 13:30

[One-on-One Meetings](#)

13:30 - 14:00

[One-on-One Meetings](#)

14:00 - 14:30

[One-on-One Meetings](#)

14:30 - 15:00

[One-on-One Meetings](#)

15:00 - 15:30

[One-on-One Meetings](#)

15:30 - 16:00

[One-on-One Meetings](#)

16:00 - 16:30

[One-on-One Meetings](#)

16:30 - 17:00

[One-on-One Meetings](#)

17:00 - 17:30

Panel Session | [The Future of Real Estate Investment – Strategies for an Evolving Market](#)
Josh Roach, Managing Director, Meritage Group

17:30 - 20:30

[Apex Beach Night - Mexican Fiesta](#)

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

Moderator) Chanmeet Narang Singh, Chief of Staff, Singh Capital Partners
Kim Clijsters, Former WTA world. nr. 1 (singles and doubles), current president of the International Tennis Hall of Fame
Louis Gresham, CEO, Hydratac

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Friday, April 11

06:30 - 07:30	LP ONLY - Outdoor Fitness and Wellness Experience Guided sunrise yoga and meditation on Seven Mile Beach, followed by fresh-pressed juices.
8:00 - 8:30	Breakfast Briefing
8:30-9:00	Fireside Chat In Conversation with Don Peebles: The Future of Real Estate, Investment, and Market Influence Romaine Bostick TV Anchor, Bloomberg Markets, The Close Don Peebles, CEO Peebles Corporation
09:00 - 09:30	One-on-One Meetings
09:30 - 10:00	One-on-One Meetings
10:00 - 10:30	One-on-One Meetings
10:30 - 11:00	Morning Networking Break and Refreshments
11:00 - 11:30	Keynote Investing in Longevity: Healthcare Poonacha Machaiah, CEO, The Chopra Foundation
11:30 - 12:00	Panel Session The Future of AI in Digital Assets – Transforming Global Investment

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Friday, April 11

12:00 – 13:00	<p>Lunch</p> <p>LP Co-Investment PitchFest</p> <p>Join this exclusive lunchtime activity designed for LPs to share co-investment opportunities, pitch strategic initiatives, and explore potential collaborations. This dynamic forum fosters peer-to-peer networking and knowledge exchange among leading investors seeking to diversify and expand their portfolios.</p> <p>What to Expect:</p> <ul style="list-style-type: none">• 3-Minute Pitches: LPs present co-investment opportunities in a concise and engaging format.• Peer Feedback & Discussion: Immediate input and collaborative idea generation from attending investors.• Facilitated Networking: Dedicated time to connect over shared investment interests.• A unique opportunity to uncover actionable partnerships and gain exposure to diverse investment strategies. <p>(Host) Guy Pinkman, Chair, Lincoln Police and Fire Pension and Advisory Committee Member, Pension Benefit Guarantee Corporation (PBGC)</p>
13:00-13:30	<p>One-on-One Meetings</p>
13:30 – 14:00	<p>One-on-One Meetings</p>
14:00-14:30	<p>Panel Discussion Democratisation of Private Markets: Tokenisation and Blockchain Revolution</p> <p>Drew Colaiezzi, Private Investments Principal, McPike Global Family Office</p> <p>Laurin Bylica, Co-Founder and Managing Partner, N8 Capital</p> <p>Sparrow Mahoney, CEO and Capital Partners, STaX Energy</p>
14:30-15:00	<p>Panel Discussion Innovation in Portfolio Allocation</p> <p>Chris Rogers , Partner, Knollwood Investment Advisory</p> <p>Lindsey Rubinstein, Chief Marketing & Investor Relations Officer, Managing Director, Opus Capital Management</p> <p>Josh Roach, Managing Director, Meritage Group</p>
15:00-15:30	<p>One-on-One Meetings</p>
15:30-16:00	<p>One-on-One Meetings</p>
16:00– 17:30	<p>Reprinting - Best Practice What to Look out for when things aren't going to plan an opportunities long term.</p> <p>Fireside chat with Noble 33</p> <p>Robert Joyce, CFO & CIO, The Lutheran Foundation for Long-Term Living</p>
17:30 - 20:00	<p>Caribbean Closing Reception</p>