



The Highly Civilized Alternative to Capital Introduction . . .

We have a 25 year history of introducing managers to allocators in our signature, "roundtable", small group format. The 10 funds we feature are the sole focus of the Forum. There are no other funds, no exposition, limited sponsorship - no nonsense. Our formula for success is simple:

10 Funds | 50 Allocators | 1 Day | 0 Distractions

- A bespoke opportunity for managers to meet qualified allocators:
 - Single & Multi-Family Offices
 - Fund-of-Funds
 - Registered Investment Advisors
 - Consultants
 - Endowments / Foundations
- Diverse strategies are presented by managers at all stages of development.
- Managers present to small groups of investors in our signature "roundtable" format:
 - Each manager hosts a 72" round table populated with allocators.
 - Each manager makes 4 consecutive 30-minute presentations to 4 different groups of allocators. Total speaking time is 120 minutes: [Format Demonstration](#)
- Networking opportunities during registration breakfast and lunch (with no speaker).
- Fund information is provided to investors in advance of the Forum in print and online.
- Marketing personnel are welcome to accompany the manager at no additional charge.
- Managers receive full contact details for all attendees to facilitate follow-up.

The Value Proposition

- Save time! Meet a large number of allocators in 1 day minimizing out-of-office time.
- Save money! Eliminate costly travel and entertainment expenses. The allocators come to you.
- Low cost, non-recurring, capital acquisition – just a one-time participation fee.
- We position you for success by prepping you and your materials for the event.
- All you do is provide us with a fund profile. We do everything else!

References Available Upon Request





Roundtable Forum Advisory Board

Our Advisory Board makes recommendations to the Forum producers concerning the overall quality and improvement of the Forum. From time to time, they may also make suggestions concerning potential manager participants. We are grateful to the Board Members for their contribution of time and professional insight.

Todd E. Petzel, Chief Investment Officer, Offit Capital Advisors, LLC, New York, NY

David R. Grosner, Chief Investment Officer, Lebanese American University, New York, NY

Steven W. Caple, President, Unity Hunt, Dallas, TX

Howard Cooper, Chief Executive Officer, Cooper Family Office, Palm Beach, FL

Keith Benedict, Chief Executive Officer, South Summit Services LLC, Charlotte, NC

Michael P. Hennessey, Managing Director, Morgan Creek Capital Management, LLC, Chapel Hill, NC

Robert D. Wedeking, CFA, Chief Investment Officer, Geller Family Office Services, LLC, New York, NY

Elizabeth R. Hilpman, Managing Director – Investments, Barlow Partners, New York, NY

Nicholas Heldfond, Family Member, Swig Investment Company, LLC, Corte Madera, CA

Sheryl Mejia, Managing Partner, Steward Asset Management, New York, NY

Steven J. Menna, Partner – National Hedge Fund Segment Leader, KPMG LLP, Dallas, TX

Roundtable Forum 2025 Calendar of Events

April 24th | The Colony Hotel | Palm Beach | 10 Managers | 50 Allocators

The Palm Beach Forum attracts a broad range of allocators from Palm Beach, South Florida and some “snowbirds” from the Northeast.

May 21st | Old Parkland | Dallas | 10 Managers | 50 Allocators

The Dallas Forum attracts a broad range of allocators from Dallas and its surrounds.

December TBA | Convene | 75 Rock Plaza | 10 Managers | 50 Allocators

The New York Forum attracts a broad range of allocators from the North East - NYC, NJ and CT.

For more information, please contact: Jane Amanda Halsey

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