

# Education Session No. 647: Rising Hedge Funds Stars: Building for the Future

July 14, 2016 at 5 PM San Francisco, CA

What are the essentials to launch and grow an investment firm in today's environment? Learn how to build and scale an institutional quality business from industry experts representing two firms named Institutional Investor's 2015 Hedge Fund Rising Stars along with a tenured hedge fund consulting professional.

Join us for an interactive panel discussion that will begin with the conception of an idea, address strategy marketability and infrastructure, cover legal and compliance considerations and tackle successful fundraising techniques. Bring your questions and "What If" scenarios for Q&A.

### **Participants**

Alice Kennon, Bank of America Merrill Lynch Janice Tang, Nipun Capital, L.P. Nadine Terman, Solstein Capital, LLC Ildiko Duckor, *Moderator*, Pillsbury Winthrop Shaw Pittman LLP

#### **Event Details**

**Date:** July 14, 2016 **Time:** 4 PM Registration.

We will begin *promptly* at 5 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails prior to session. **Host:** Pillsbury Winthrop Shaw Pittman LLP

Location: Four Embarcadero Center, 22nd Floor, San Francisco, CA 94111

**RSVP: RSVP Now** 

If you have any questions about this event, please contact the California, North committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance.

No-show proceeds will be donated to the beneficiary of 100WHF's most recent US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your <u>Member Profile</u>

Space is limited. No walk-ins will be permitted.

#### **Biographies**

Alice Kennon, West Coast PB Sales and Business Consulting, Bank of America Merrill Lynch. Ms. Kennon is responsible for Prime Brokerage Sales and Business Consulting for Western Region Hedge Fund Clients at Bank of America Merrill Lynch. Prior to joining the San Francisco team in July 2014, Ms. Kennon worked at Bank of America Merrill Lynch's London office on the Business Consulting team assisting Hedge Fund start ups in each stage prelaunch and established Hedge Fund clients on institutionalization of the business, product diversification and regulatory implications for their firm. Ms. Kennon also has experience working in Capital Introductions at Bank of America Merrill Lynch assisting hedge fund clients with their asset raising capabilities and producing white papers around Hedge Fund trends and intelligence. Prior to working within the Prime Brokerage division, Ms. Kennon worked at Merrill Lynch in a cross asset product sales role, liaising with the biggest 100 institutional clients of the firm. Ms. Kennon received her honours degree in Economics from the University of Durham, England.

Janice Tang, Head of Business Development and Investor Relations, Nipun Capital, L.P.

Janice Tang leads the Business Development and Investor Relations team at Nipun Capital, L.P. Ms. Tang was previously the Director of Investor Relations at Ortus Capital Management, a systematic currency hedge fund in Hong Kong. Prior to Ortus, Ms. Tang was a product specialist and managed relationships with institutional investors for Highbridge Capital Management. Ms. Tang holds a B.S. in Management and Information Systems from the Stern Undergraduate School of Business at New York University. She is also a Chartered Alternative Investment Analyst (CAIA) charterholder.

Nadine Terman, CEO, Co-CIO and Founder, Solstein Capital, LLC

In 2010, Nadine Terman co-founded Solstein Capital, LLC with J.C. Torres. At Solstein, she oversees both investment and operations functions and leads the firm as a Managing Member. Previously, Ms. Terman was a Partner with Blum Capital Partners and served on its Investment Committee. For over eight years, she invested in both public and private companies and worked extensively with portfolio companies' management teams and boards on business, financial, and governance initiatives. Prior to Blum Capital, Ms. Terman was a private equity Associate with Behrman Capital. She also worked as an Analyst with both Merrill Lynch and Goldman Sachs. Ms. Terman has a B.A. with Honors and with Distinction from Stanford University and was recognized with the Firestone Medal for Excellence in Research and as Phi Beta Kappa. In addition, she earned an M.B.A from the Stanford Graduate School of Business, where she was an Arjay Miller Scholar.

**Ildiko Duckor**, Partner and Co-Head Investment Funds & Investment Management, Pillsbury Winthrop Shaw Pittman LLP

Ildiko Duckor is a Partner and the co-head of Pillsbury's Investment Funds & Investment Management (IFIM) practice. She provides strategic and legal advice to hedge fund managers, other investment advisers and commodity pool operators related to the structuring, operation and management of their advisory firms and domestic and offshore private funds. Ms. Duckor has extensive experience preparing and negotiating managed account, funds-of-one and sub-advisory agreements, side letters with institutional and sovereign investors and seed capital arrangements. She helps her clients with a broad range of securities regulatory compliance matters including registration with federal and state authorities, regulatory filings, broker-dealer and commodities matters, solicitation/placement arrangements, trading practices, issues affecting quantitative asset managers, automated

(robo) advisers, and developing and maintaining compliance and internal control policies and procedures.

Ms. Duckor oversees the IFIM group's Emerging Hedge Fund Manager program, which provides packaged launch solutions to small hedge fund startups for a reasonable fixed fee.

Ms. Duckor's prior investment management experience includes both private practice (Schulte Roth & Zabel LLP, New York) and in-house (Barclays Global Investors, N.A., now BlackRock, San Francisco). Previous industry engagements include Chair of the policy committee of the California Hedge Fund Association and membership on the steering committee of the Association of Women in Alternative Investing.



#### About Pillsbury Winthrop Shaw Pittman LLP

Pillsbury has been named "Best Onshore Law Firm-Client Service" by HFMWeek at its HFM U.S. Hedge Fund Services Awards several times, including in 2015. The HFM Awards recognize the top U.S. hedge fund service providers that have demonstrated exceptional customer service and innovative product development over the past 12 months. Pillsbury's Investment management regulatory and fund-formation practice works with hedge funds, private equity and other alternative investment vehicles as well as institutional investors. We are a global practice with 20 offices in the US, UK, Asia and the Middle East. We draw support from other practice groups for derivatives and financing, ERISA, profit-sharing, tax, defense/litigation, among others.

## About 100 Women in Hedge Funds (<u>www.100womeninhedgefunds.org</u>)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over \$38 million for philanthropic causes in the areas of women's and family health, education and mentoring.







#### Give Back

100 Women in Hedge Funds provides a 'Give Back' program that enables members to match their resources (time, access, financial) to projects that will help us expand our successful initiatives. Visit 100WHF Give Back today and tell us how you can help.



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