

2025 Portfolio Management Meeting

Convene, Venue 42, 5 Times Square, NYC | June 4

WEDNESDAY, JUNE 4

8:00am	Breakfast
8:50am	Welcome Comments & NAREIM Portfolio Management Committee Update Co-Chair: Kate Bassett , Director, Associate Portfolio Manager, Invesco Co-Chair: Scott Dunphy , Senior Director, Real Estate Portfolio Manager, MetLife Investment Management
9:00am	How to Structure & Develop a Successful Portfolio Management Team Session leaders: Ian Braverman , Director, Portfolio Management, Harrison Street; Mike Fenner , Senior Director, Portfolio & Asset Management, National Real Estate Advisors <ul style="list-style-type: none"> This session will include a summary of results from a survey of NAREIM members on Portfolio Management function, structure, and development distributed prior to the meeting. Following that will be whole-room discussions centered around the proper allocation of work, responsibilities, and resources within a Portfolio Management team, and strategies for attracting and developing talent in the industry.
10:00am	Break
10:15am	Alternative Property Types: Assessing Investor Appetite Session leaders: Justin Shanahan , Deputy Portfolio Manager, CBRE Investment Management; Kate Davis , Senior Portfolio Manager, Harrison Street Speakers: Ben Wobschall , Executive Vice President, Data Center Capital Markets, CBRE Investment Management; Nick Walker , Vice Chairman, Self Storage Capital Markets, CBRE Investment Management; Elliot Pessis , Managing Director & Head of Senior Housing Asset Management North America, Harrison Street <ul style="list-style-type: none"> Subject matter experts join us to explore alternative sectors of real estate in more detail, including the benefits and challenges of those investing in them. The discussion will focus on self storage, data centers, and senior housing, but will touch on other alternatives as well.
11:15am	Break
11:30am	Where is Your Firm on Its AI Journey? Session leaders: Will Hedley , Principal, BGO; Scott Dunphy , Senior Director, Real Estate Portfolio Manager, MetLife Investment Management; Drew Stepanek , Managing Director, Stockbridge Capital Group <ul style="list-style-type: none"> AI continues to evolve and advance with more firms beginning to adopt and integrate it into their processes. But what are firms using, how are they using it, and are they realizing the benefits?
12:30pm	Lunch. NAREIM will be hosting a separate lunch for Debt Portfolio Managers in the Boardroom, to network with each other one-on-one.
1:30pm	Debt Markets & Fund Leverage Strategies Session leaders: Kate Bassett , Director, Associate Portfolio Manager, Invesco; Nolan Henry , Executive Director, UBS Realty Investors Speakers: Yorick Starr , Managing Director, Credit Investments, Invesco; Anthony Fertitta , Senior Managing Director, Capital Markets, JLL <ul style="list-style-type: none"> This session will include a discussion on the debt markets focusing on both asset-level and fund-level financing, followed by whole-room conversations centered around leveraging strategies for real estate portfolios.

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WEDNESDAY, JUNE 4 continued	
2:30pm	Break
2:45pm	<div>Portfolio Construction: What are Firms Leaning Into?</div> <div>Session leaders: Lucas Kimmel, Managing Director, LaSalle Investment Management; Jacob Maliel, Partner, Portfolio Management, TA Realty</div> <div><ul style="list-style-type: none">In an environment where investor capital remains cautious, what objectives are portfolio managers prioritizing with the next marginal dollar raised?How are we tracking at the halfway mark of 2025 relative to what we envisioned at the start of the year?</div>
3:45pm	End of Meeting

2025 PORTFOLIO MANAGEMENT COMMITTEE

NAREIM thanks the 2025 Portfolio Management Committee members, including:

Co-Chair: Kate Bassett, Invesco; Co-Chair: Scott Dunphy, MetLife Investment Management; Will Hedley, BGO; Justin Shanahan, CBRE Investment Management; Kate Davis & Ian Braverman, Harrison Street; Lucas Kimmel, LaSalle Investment Management; Mike Fenner, National Real Estate Advisors; Ki Park, Nuveen Real Estate; Drew Stepanek, Stockbridge Capital Group; Jake Maliel, TA Realty; Nolan Henry, UBS Realty Investors

For 30 years, NAREIM has been the home of real estate investment management benchmarking and best practice education. Our focus is on peer-to-peer networking, where the only conversations are candid and brutally honest. You come to NAREIM to understand what is working and what is not working among peers. NAREIM is where you understand what the industry is really thinking.

NAREIM represents 9 functional areas within the real estate investment management firm, providing in-person and virtual connections for each group throughout the year:

- Architecture, Engineering & Development
- Asset Management
- Capital Raising & Investor Relations
- Data & Information Management
- Executive Officer
- Legal, Compliance & Risk
- Portfolio Management
- Sustainability
- Talent Management

NAREIM CALENDAR 2025		
July 15–16	Talent Management	Boston
September 9–10	Architecture, Engineering & Development	NYC
September 17–19	Executive Officer	Denver
October 7–8	Data & Information Management	Nashville
November 5	Legal, Compliance & Risk	Chicago
November 12	Compensation Strategies	Virtual
December 3–4	Capital Raising & Investor Relations	Chicago

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled throughout 2025. Please check the NAREIM website regularly for more details. www.nareim.org