



Barclays Select Series 2014

Real Estate: The Year Ahead

December 9-10, 2014

Barclays, 745 Seventh Avenue, New York City

Agenda

December 9, 2014

8:00am-8:30am Registration and Breakfast

8:30am-9:00am **Emerging Trends in Real Estate 2015 – PricewaterhouseCoopers**
Andrew Warren, Director

9:00am-10:00am **Net Lease: Long Term Growth Alternative**
Trevor Bond, CEO, W.P. Carey Inc.
Ben Butcher, CEO, President & Chairman, STAG Industrial
Gordon DuGan, CEO, Gramercy Property Trust
Jay Leupp, Portfolio Manager, Lazard Asset Management
Christopher Volk, CEO, STORE Capital

Moderator: Scott Schaevitz, Co Head Americas Real Estate Investment Banking, Barclays

10:00am-11:00am **Retail: The Post E-Commerce World**
Kenneth Bernstein, President & CEO, Acadia Realty Trust
Mike Carroll, CEO, Brixmor Property Group Inc.
Art Coppola, Chairman & CEO, Macerich Company
Nora Creedon, Co-Lead Portfolio Manager REITS Strategies, Goldman Sachs Asset Management
Greg Maloney, President & CEO of Retail, Jones Lang LaSalle

Moderator: Glenn Rufrano, Chairman & CEO, O'Connor Capital Partners



- 11:00am–12:00pm **Investment: Strategic Allocation and Performance**
Michael Ashner, *Chairman & CEO*, Winthrop Realty Trust
Jeff Krasnoff, *CEO*, Rialto Capital
Richard J. Mack, *Co-Founder & CEO*, Mack Real Estate Group
Jay Rosenberg, *Managing Director, Portfolio Manager*, Nuveen Asset Manager
Darcy Stacom, *Vice-Chairman – Investment Properties Group*, CBRE Group, Inc.
- Moderator:** Doug Sesler, *President*, True Square Capital LLC
- 12:15pm-1:15pm **Lunch – Capital: Liquid Implications**
Dean Adler, *CEO*, Lubert Adler Partners LP
Michael Nash, *Senior Managing Director*, Blackstone Group Inc.
Tad Philipp, *Director – Commercial Real Estate Research*, Moody’s
Mitchell Sabshon, *President & CEO*, Inland Real Estate Investment Corporation
Douglas Weill, *Managing Partner*, Hodes Weill & Associates
- Moderator:** Larry Kravetz, *Managing Director, Head of Primary CMBS Finance*, Barclays
- 1:30pm-2:30pm **Healthcare: The Outlook for 2015 and Beyond**
- Moderator:** Joshua Raskin, *Managing Director*, Barclays
- 2:30pm-3:30pm **Office: Value Drivers**
Tim Callahan, *President & CEO*, Callahan Capital Partners
MaryAnne Gilmartin, *President & CEO*, Forest City Ratner Companies
Mark Howard-Johnson, *Portfolio Manager*, Blackrock Investment Management
Douglas Linde, *President*, Boston Properties
Scott Rechler, *Chairman & CEO*, RXR Realty LLC
- Moderator:** Mary Ann Tighe, *CEO, New York Tri-State Region*, CBRE Group, Inc.



3:30pm-4:30pm

International: Global Convergence

Steve Buller, *Portfolio Manager*, Fidelity Management and Research Company

Adam Gallistel, *SVP & Head of Brazil*, GIC Real Estate, Inc.

Adam Metz, *Managing Director, Head of International Real Estate*, The Carlyle Group

Tim Morris, *Founder & Partner*, Proprium Capital Partners, LLC

Dean Shapiro, *SVP, Investment*, Oxford Properties Group

Moderator: Gary Garrabrant, *Managing Partner*, Jaguar Growth Partners

Agenda

December 10, 2014

8:00am-8:30am

Registration and Breakfast

8:30am-9:00am

Keynote: The Changing Economics of Cities

William Strange, *SmartCentres Professor of Real Estate*,
Rotman School of Management, University of Toronto

9:00am-10:00am

The Implication of Secular Change

George Marcus, *Chairman*, Essex Property Trust | Marcus and Millichap Company

Sandeep Mathrani, *CEO*, General Growth Properties

Hamid R. Moghadam, *Chairman & CEO*, Prologis, Inc.

David Neithercut, *President & CEO*, Equity Residential

William Strange, *SmartCentres Professor of Real Estate*,
Rotman School of Management, University of Toronto

Moderator: Chris Mayer, *Co-Director & Paul Milstein Professor of Real Estate*, Columbia Business School



10:00am-11:00am **Multi-Family: Sustainable Gains**
Neil Abraham, *Portfolio Manager*, Alliance Bernstein
Ric Campo, *Chairman & CEO*, Camden Property Trust
Todd M. Farrell, *President*, Lennar Multifamily Communities, LLC
Matthew Lawton, *Executive Managing Director*, HFF
David Schwartz, *Co-Chairman & CEO*, Waterton Associates LLC

Moderator: Ron Witten, *President*, Witten Advisors LLC

11:00am-12:00pm **Lodging: Full Speed Ahead or Proceed with Caution?**
Jeff Fisher, *CEO*, Chatham Lodging Trust
Mathew Kirschner, *Portfolio Manager*, Cohen & Steers Capital Management Inc.
Michael Medzigian, *CEO*, Carey Watermark
Bruce Riggins, *CFO*, LaSalle Hotel Properties
Rick Smith, *CEO*, FelCor Lodging Trust

Moderator: Arthur Adler, *Managing Director & CEO*, Jones Lang LaSalle | Hotels & Hospitality Group

12:15pm-1:15pm **How to Make Money in 2015**
Michael Fascitelli, *Founder*, MDF Capital
William Rudin, *Vice Chairman & CEO*, Rudin Management Company, Inc.
Jay Sugarman, *Chairman & CEO*, iStar Financial Inc.

Moderator: Schecky Schechner, *Managing Director*, Barclays