



2024 **SPONSORSHIP OPPORTUNITIES**

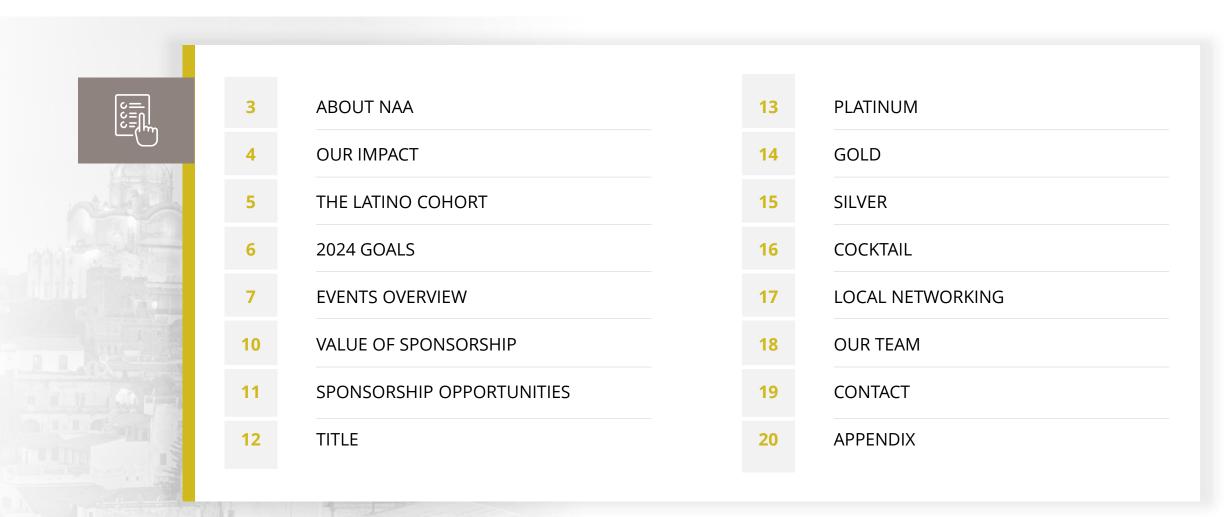


www.naaonline.org



CONTENT





ABOUT



The New America Alliance (NAA) is a nationally recognized nonprofit trade association dedicated to fostering growth and prosperity for diverse-owned alternative investment firms, emphasizing on the Hispanic and Latino financial industry.





Our membership consists of individuals from various backgrounds and investment strategies. Central to the NAA's mission is a steadfast commitment to cultivating and strengthening connections within our well-established network of allocators.



Our primary objective is to bolster the success of our members. Since 1999, our unwavering dedication to this distinctive mission has set us apart in the field, and we remain resolute in advancing the interests of Hispanic and Latino alternative investment firms.

What We Do



As both a 501(c)(3) and 501(c)(6) nonprofit organization, the NAA's mission is to create opportunities and facilitate the flow of capital to our member network, thereby expanding the utilization of investment managers by institutional investors.

We accomplish this through a range of initiatives, including the provision of comprehensive educational resources, the organization of thought-provoking industry events, and active advocacy on behalf of our members.

OUR IMPACT





To date, the **New America Alliance** Latino asset managers represent over **\$1.3 trillion in aggregate assets under management**, as compared to under \$500 million reported in the NAA White Paper in 2003.



NAA membership has grown 50% since the beginning of 2023, from 38 to 60 firms across private equity, private credit, real estate, infrastructure, mezzanine, public equities, and hedge funds.



16 of the 60 New America Alliance member firms (Northern Trust, Cambridge Associates, Clearlake, Valor, Reverence, Ramirez Asset Management, Brightwood, LM Capital, Bivium, Palladium, Impactive Capital, Varadero, Gladius Capital, Kabouter, Basis, Mill Point, Crayhill, Muller & Monroe, and Madryn) have more than \$1 billion in AUM.



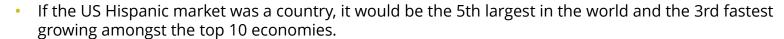
Together, these firms manage over \$1 trillion and range across asset classes, including private equity, real estate, hedge funds, and public markets.

THE LATINO COHORT





The US Latino is the present, future, and assuming an ever more prominent role in the mainstream economy.



- Latinos are more entrepreneurial; they tend to start businesses at 2x the rate of their non-Hispanic counterparts.
- When compared to the non-Latino U.S. cohort, the Latino cohort grew 4.5 times faster in terms of GDP, implying most of the U.S. growth came from the Latino population.
- Latinos make up 19% of the U.S. population and are responsible for more than half of the U.S. population growth from 2010 to 2020 and more than 65% of the population growth from 2019 to 2020.
- Latinos make up about 25% of American youths.
- Latinos' increasing political engagement yields the potential to sway elections and impact policy direction.
- The U.S. Latino demographic is a tapestry woven from various countries of origin, languages, and rich traditions.



The NAA ensures capital flow is aligned with the demographic trends of the Latino community by facilitating access and control of capital.

American success is dependent on American Latino success.

2024 GOALS



By focusing on these goals,

the New America Alliance can further solidify its position as a leading advocate for diversity, equity, and inclusion within the alternative investment landscape.



Increase Membership Engagement:

Develop mentorship programs and educational resources specifically tailored for emerging managers, fostering their growth within the industry.



Enhance Diversity and Inclusion:

Implement and promote diversity and inclusion programs, ensuring representation and equal opportunities for members from various backgrounds.



Expand International Presence:

Foster partnerships and collaborations with organizations abroad, expanding the NAA's reach to new international markets.



Empower Emerging Managers:

Strengthen member involvement through targeted communication, events, and initiatives, aiming for a 20% increase in active participation.



Boost Sponsorship Support:

Increase sponsorship revenue by 30% through strategic partnerships, allowing for the expansion of initiatives and resources.



Enhance Digital Presence:

Revamp the organization's website and social media channels, improving user experience and engagement, and increasing online presence by 25%.



Advance Thought Leadership:

Host monthly webinars and publish quarterly research papers on emerging trends and issues within the alternative investment industry, establishing the NAA as a thought leader in the field.



Strengthen Advocacy Efforts:

Advocate for policies supporting diversity and inclusion within the financial sector, actively engaging with policymakers and industry stakeholders.



Launch Community Outreach Programs:

Establish programs that give back to the community, such as financial literacy workshops and scholarships, demonstrating the NAA's commitment to social responsibility.

EVENTS OVERVIEW

IN PERSON

The NAA **2024** event calendar is a robust schedule throughout the year, featuring nine different categories of programming and events outlined on the following three slides.







2024 REGIONAL NETWORKING SESSIONS Several times each year, the NAA will host evening networking events that include a one-hour educational program, followed by a networking reception, taking place across the United States. These gatherings typically attract between 20 to 30 members and local partners associated with the specific location.



2024 NAA CONSULTANT RETREAT

This event offers investment firms the opportunity to develop strong relationships with consultants and other allocators in an intimate, laid-back setting.



2024 SYMPOSIUM The NAA's Symposium is designed to foster significant connections between institutional allocators and emerging managers. This event offers a distinctive platform for attendees to network, participate in insightful discussions, and form relationships with other professionals in the industry.

The 2024 Symposium will take place in Mexico City over a span of 1-2 days and is specifically tailored for a restricted group of 75 to 125 NAA members who will have the opportunity to engage in one-on-one meetings with eighty pre-qualified investors consisting of high-net-worth individuals, single and multi-family offices, insurance companies, pension funds, and Sovereign Wealth Funds.



2024 BOARD RETREAT

This retreat is available to NAA Board and Advisory members and is specifically tailored to tackle both the existing and any newly introduced strategic and tactical objectives of the organization.



2024 WALL STREET SUMMIT The primary event takes place during Hispanic Heritage Month and concentrates on the advancement of Latino leadership across all industry sectors. It also highlights the untapped potential and opportunities within the Latino community, which play a pivotal role in the national economic revival.

This event is scheduled to be hosted in New York City for a day and will be attended by 500 to 600 participants. The program will include daytime sessions and a VIP Gala Dinner.

EVENTS OVERVIEW

VIRTUAL







2024 LAUNCHING YOUR FIRM AND FUND SERIES This virtual multi-part series will be tailored for asset and investment managers across different asset classes. It features discussions led by globally recognized experts who provide valuable insights for launching your business successfully.

Our virtual program includes panel discussions, webinars, and roundtables, allowing participants to choose sessions aligned with their interests or attend the entire series, ensuring a personalized experience.



2024 QUARTERLY VIRTUAL WEBINARS Conducted four times a year, the Virtual Webinars offer an invaluable platform for knowledge sharing and networking within our community, bringing together thought leaders, industry experts, and our esteemed members to delve into crucial topics, trends, and insights across various sectors.

Each session provides a unique opportunity to foster meaningful connections, exchange ideas, and gain valuable perspectives on emerging issues. Through these interactive virtual events, the New America Alliance continues to empower and educate our community, driving the advancement of diverse-owned alternative investment firms and promoting growth and prosperity.



2024 VIRTUAL ALLOCATOR CONNECTION FORUM These Virtual Forums provide opportunity for potential investors to engage with NAA members and discuss manager performance, investment strategies, and relevant emerging manager programs.

Consisting of two virtual events per month, each session spans 90 minutes. The session format includes either a 30-minute fireside chat with the organization's leadership or an asset class panel discussion featuring specific asset classes actively involved in the Emerging Manager ecosystem.

Following the fireside chat or asset class panel discussion, NAA will facilitate a virtual 60-minute speed networking session or a roundtable asset-specific breakout, each limited to a maximum of five managers.

EVENTS OVERVIEW

WHAT TO EXPECT







NETWORKING OPPORTUNITIES

Participate in robust networking opportunities with conference attendees, including:

- General Partners
- Limited Partners
- Emerging Managers

- Partner Firms
- 60+ 501c3 Pathway Alumni



ACCESS TO PARTNERS

General Partners include funds with:

- Private Equity
- Venture Capital
- Hedge Fund

- Real Estate
- Real Asset Strategies



INDUSTRY LEADERS

Hear insights and timely perspectives from industry leaders representing various investors, such as:

- Pension Plans
- Endowments
- Family Offices
- Foundations

- OCIOs
- Consultants
- Asset Managers

Engage in facilitated LP/GP one-on-one meetings



THOUGHT LEADERSHIP

Panel discussions covering strategic and important topics:

- Secondaries
- GP Stakes
- Real Estate
- Stepping Out With Fund I
- Venture Capital

- The Growing Importance of Alternative Investments for Life Insurance Companies
- Credit: Manager
 Investment Insights
- Sustainable Investing
- Attracting Capital as an Emerging Manager
- Hedge Fund Investment Landscape
- Career: Breaking into the Buyside

VALUE OF SPONSORSHIP





As an NAA sponsor, you can accomplish numerous goals your organization and position yourself for and your executives as leaders in the community.

EXPOSURE TO EMERGING & DIVERSE MANAGERS

Meet and interact with emerging and diverse managers who are pursuing unique investment strategies across private and public markets. By interacting with these managers, you may discover new investment opportunities and build relationship with potential partners that you can methodically evaluate as part of your own investment process.

DEI INITIATIVES RECOGNITION

Collaborating with the NAA will enhance your organization's reputation for purposeful social impact. By contributing to the organization's events that build the pipeline of diverse talent entering the financial services industry, you will be recognized as a supporter of DEI initiatives. The NAA's efforts to increase access to capital for Latino and other diverse managers can further enhance your organization's reputation in the industry.

EMPLOYEE ENGAGEMENT & PROFESSIONAL DEVELOPMENT

Sponsoring the NAA can help to engage and develop your employees to benefit your business as well as bottom-line performance. It can provide them with opportunities to get involved in the community, build their networks, and develop new skills. This can lead to increased employee satisfaction and retention.

ACCESS TO HUMAN CAPITAL

You will have access to a diverse pool of talented individuals with unique perspectives and skill sets. NAA events deliberately gather talented professionals which could be beneficial to your organization's growth. You will have the opportunity to connect with mid-level and senior-level executives as well as talent from different industries.

ACCESS TO GROWING LATINO MARKETS

Expand your reach into the growing Latino market in an intentional manner. The Latino community represents a growing market that is projected to reach over \$2.6 trillion in buying power by 2025. By aligning your brand with a Latino organization, you can increase your visibility in this community and potentially tap into new customer segments.

ENHANCED BRAND IMAGE

Demonstrate your commitment to an established national organization, thereby improving your brand image. This can help you attract and retain top talent, as well as appeal to socially conscious consumers who are increasingly seeking out brands that align with their values. Additionally, it can help to position your organization as a leader in the industry and a champion of diversity and inclusion in the industry, resulting in increased positive publicity and planned exposure.

PHILANTHROPIC OPPORTUNITIES

Since 1999, the NAA has launched and led philanthropic activities and supported charitable causes. Through your affiliation with the NAA, you can align your brand with these efforts and demonstrate your thoughtful commitment to social impact. This will help to build goodwill and enhance your reputation in the community.

PREVIOUS SPONSORS









TAG TELSEY
ADVISORY
GROUP



Avante,



MULLER & MONROE











SPONSORSHIP OPPORTUNITIES



	TITLE - \$150,000	PLATINUM - \$100,000	GOLD - \$75,000	SILVER - \$25,000	COCKTAIL & NETWORKING SPONSOR - \$35,000	SUPPORT - \$15,000
Event Advisory Board	X	X				
Award Selection Committee	X					
Thought Leadership	2 articles	1 article				
NAA Membership	2	2	2	1	1	
SPEAKING						
Opening Remarks	X				X	
Fireside Chat/Interview	X	Introduction				
Keynote	X					
Panel	X	X	X			
Manager Pitch Judge			X	X		
Breakfast/Lunch Presentation		Х				
ATTENDEES						
Attendee List	3 weeks prior	2 weeks prior	1 week prior	3 days prior	5 days prior	
Introductions	10	7	5	2	3	1
Exclusive Networking Space	Х	X	X		Dedicated table	

The NAA will also tailor partnership opportunities to specific firms as appropriate

TITLE SPONSOR





\$150,000 USD



SPONSORSHIP

- NAA individual **membership** for two (2) executives
- Sponsor shall be entitled to the right of first offer for future sponsor opportunity
- Participation for one (1) executive on the Event Advisory Board for Wall Street Summit
- Participation for one (1) executive on the Award
 Selection Committee for Wall Street Summit Gala Dinner



BRANDING

- Prominent logo placement across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - On-site signage (stage included) & event nametags



SPEAKING OPPORTUNITIES

- A senior-level executive from your firm will have the option to partake in **opening remarks**
- A senior-level executive from your firm will have the option participate in a Fireside chat/interview
- With NAA approval, a senior-level executive from your firm will give a Keynote address and/or join a Panel



MARKETING

- Circulation of two (2) thought leadership articles to NAA members & network
- Your sponsorship will receive three (3) dedicated social posts throughout 2024



ATTENDEES/ NETWORKING

- Attendee list access three (3) weeks prior to the event
- NAA facilitated introductions to ten (10) attendees of interest
- Dedicated space for 1:1 **networking lunch**



- Five (5) internal passes
- Five (5) external
- A table of ten (10) for the Wall Street Summit Gala Dinner
- Five (5) tickets to the Wall Street Summit VIP Dinner

PLATINUM SPONSOR





\$100,000 USD



- NAA individual **membership** for two (2) executives
- Sponsor shall be entitled to the right of first offer for future sponsor opportunity



BRANDING

- **Prominent logo placement** across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - On-site signage (stage included) & event nametags



SPEAKING OPPORTUNITIES

- A senior-level executive from your firm will have the option to introduce a Keynote/Fireside chat
- A senior-level executive from your firm will participate in a **Panel Discussion**
- Sponsorship firm will have the option to present during breakfast/lunch



MARKETING

- Circulation of one (1) thought leadership articles to NAA members & network
- Your sponsorship will receive three (3) dedicated social posts throughout 2024



ATTENDEES/ NETWORKING

- Attendee list access two (2) weeks prior to the event
- NAA facilitated introductions to seven (7) attendees of interest
- Dedicated space for 1:1 networking lunch



- Three (3) internal passes
- Three (3) external
- A table of ten (10) for the Wall Street Summit Gala Dinner
- Three (3) tickets to the Wall Street Summit VIP Dinner





- NAA individual **membership** for two (2) executives
- Sponsor shall be entitled to the right of first offer for future sponsor opportunity



BRANDING

- Medium logo placement across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - On-site signage (stage included)



SPEAKING OPPORTUNITIES

- A senior-level executive from your firm will participate in a **Panel Discussion** at the Wall Street Summit
- Sponsorship firm will have the option to be a judge for the Manager Pitch



MARKETING

Your sponsorship will receive two (2) dedicated social posts



ATTENDEES/ NETWORKING

- Attendee list access one (1) week prior to the event
- NAA facilitated introductions to five (5) attendees of interest
- Dedicated space for 1:1 **networking lunch**



- Two (2) internal passes
- Two (2) external
- Five (5) tickets to the Wall Street Summit Gala Dinner
- Two (2) tickets to the Wall Street Summit VIP Dinner

SILVER SPONSOR





\$25,000 USD



- NAA individual **membership** for one (1) executive
- Sponsor shall be entitled to the right of first offer for future sponsor opportunity



BRANDING

- Small logo placement across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - On-site signage



SPEAKING OPPORTUNITIES

Sponsorship firm will have the option to be a **judge** for the **Manager Pitch**



MARKETING

Your sponsorship will receive one (1) dedicated social posts



ATTENDEES/ NETWORKING

- Attendee list access three (3) days prior to the event
- NAA facilitated introductions to three (3) attendees of interest



- Two (2) internal passes
- Two (2) tickets to the Wall Street Summit Gala Dinner

COCKTAIL & NETWORKING SPONSOR





\$35,000 USD



- NAA individual **membership** for one (1) executive
- Sponsor shall be entitled to the right of first offer for future sponsor opportunity



BRANDING

- Medium logo placement across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - · On-site signage



SPEAKING OPPORTUNITIES

A senior-level executive from your firm will have the option to partake in **opening remarks**



MARKETING

Your sponsorship will receive two (2) dedicated social posts



ATTENDEES/ NETWORKING

- **Attendee list** access five (5) days prior to the event
- NAA facilitated introductions to three (3) attendees of interest
- Dedicated space for 1:1 networking



- Three (3) internal passes
- Three (3) external passes
- A table of ten (10) for the Wall Street Summit Gala Dinner
- Three (3) tickets to the Wall Street Summit VIP Dinner

SUPPORT SPONSOR





\$15,000 USD



SPONSORSHIP

Sponsor shall be entitled to the right of first offer for **future sponsor opportunity**



BRANDING

- Small logo placement across all branding
- Your logo featured on:
 - Agenda
 - Website
 - Event communication & promotion
 - On-site signage



ATTENDEES/ NETWORKING NAA facilitated introductions to one (1) attendee of interest



MARKETING

Your sponsorship will receive one (1) dedicated social posts

OUR TEAM

NAA INC BOARD OF DIRECTORS



EXECUTIVE COMMITTEE

President and Chief Executive Officer

Anyori Hernandez

New America Alliance

Co-Vice Chair of Governance

Danielle Beyer

Chief Operating Officer L2 Point Management LLC

Co-Vice Chair of Membership

Gerson R. Guzman

Co-Founder Ceiba Capital Partners

Chair of the NAA Institute Board of Directors & Co-Vice Chair of Advocacy

Dolores M. Muñoz

Senior Vice President Loop Capital LLC

NAA Inc Chair of the Board

Leon Brujis

Partner and Head of East Coast 65 Equity Partners

Co-Vice Chair of Governance

Maria Jelescu Dreyfus

CEO and Founder
Ardinall Investment Management LP

Co-Vice Chair of Programs

Avinash Amin

Managing Partner
Madryn Asset Management, LP

Co-Vice Chair of Advocacy

Manuel Gonzalez Mestre

President and CEO MGM Consulting, LLC

Treasurer

Gabriel J. Rodriguez

Managing Partner, Founding Member Empiric Institutional LLC

Co-Vice Chair of Membership

Jessie M. Gabriel

Founder and CEO All Places

Co-Vice Chair of Programs

Claudio Phillips

Head of Corporate Credit Reverence Capital Partners

General Counsel

Linda Igarashi

Attorney
Sheppard Mullin Richter & Hampton LLP



CONTACT US



For more information

on the sponsorship categories and process, contact:



Anyori Hernandez President & CEO

anyori@naaoline.or



Jodi Towner
Director of Operations

towner@naaoline.org

www.naaonline.org



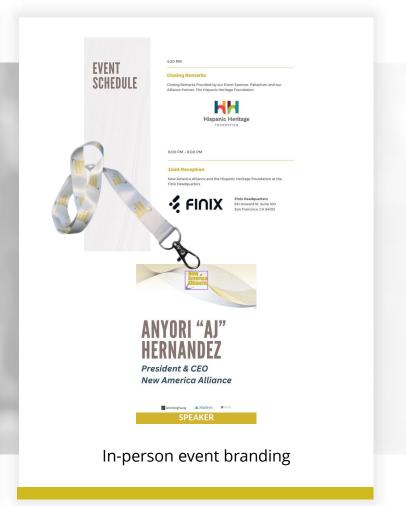


BRANDING EXAMPLES









2022 CAPITAL TOURS



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Our team has established connections with the institutional investor community, enabling us to understand allocator's obstacles and the investment strategies they pursue.

This insight helps us curate content, deliver an exceptional institutional investor audience, and provide critical information to our sponsors.

SDCERS*	Aksia 🌌	m	MEKETA INVESTMENT GROUP	SEIU	₩ NJDPB	STEPSTONE	▲ Invesco	Callan	TRS 1000HI HEMMENT DISTRICT TOOMS	FAIRI/IEW
San Diego City Employees' Retirement System	Aksia	Muller & Monroe	Meketa Investment Group	Service Employees International Union (SEIU)	New Jersey Division of Investment	StepStone Group	Invesco Private Capital	Callan	Teacher Retirement System of Texas (TRS)	Fairview Capital Partners
The Rockefeller Foundation	OREWCIAL®	UNIVERSITY OF CALIFORNIA	HARBOURVEST **	C A CAMBRIDGE ASSOCIATES	GCM GROSVENOR	** Hamilton Lane	CALSTRS.	ERS	L//.CERA	LACERS LA CITY EMPLOYEES' RETHREMENT SYSTEM
The Rockefeller Foundation	Crewcial Partners	University of California	HarbourVest Partners	Cambridge Associates	GCM Grosvenor	Hamilton Lane	California State Teachers' Retirement System	Employees Retirement System of Texas	Los Angeles County Employees Retirement Association	Los Angeles City Employees' Retirement System
NV	SBI ILLINOIS STATE BOARD OF INVESTMENT	NEUBERGER BERMAN	LAFPP		IMRF.	C T Chicago Teachers' P F Pension Fund		Teachers' Retirement System of the State of Illinois		
New York State Teachers' Retirement System	Illinois State Board of Investment	Neuberger Berman	Los Angeles Fire and Police Pensions	Federal Reserve Employee Benefits System	Illinois Municipal Retirement Fund	Chicago Teachers' Pension Fund	Office of the New York City Comptroller	Teachers' Retirement System of the State of Illinois		

CAPITAL TOURS



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Furthermore, our approach not only facilitates effective communication between sponsors and institutional investors but also enables us to stay current with the latest trends and developments in the industry, allowing us to provide even more valuable insights and solutions to our clients.



Neuberger Berman Andrey Borisovskiy Vice President



Neuberger Berman Patricia Zollar Managing Director



New Jersey Div. of Investment Eddie Ramos Head of External Advisor Emerging Portfolio Manager



NYSTRS Thomas Lee CIO



New York City Comptroller Brad Lander Comptroller



Office of the New York City Comptroller Taffi Ayodele, Director Diversity, Equity and Inclusion & Emerging Manager Strategy



Rockefeller Foundation Chun Lai



SDCERS Elizabeth Crisafi



SEIU Edgar Hernández Assistant Director, Strategic Initiatives Dept.



StepStone Bhavika Vyas Managing Director



StepStone Jose Fernandez Partner & Co-COO



TRS of Texas Jase Auby



TRS of Texas Kirk Sims, Director Emerging Manager Program



TRS of Illinois Jose Gonzalez, Diverse & Emerging Managers Program



TRS of Illinois Stan Rupnik Executive Director & CIO



The Rock Creek Group Megan Frederiksen Vice President



The Rock Creek Group Siddarth Sudhir Managing Director



UC Investments Arthur Guimaraes COO



UC Investments Wendy Pulling Director of ESG Integration

ALLOCATOR CAPITAL TOURS



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By leveraging our network and insights into the institutional investor community's challenges and capital allocation strategies, our team is able to curate content and deliver it to a highly targeted institutional investor audience.

This enables us to provide our sponsors with essential information and reach an exceptional level of engagement.



Anastasia Titarchuk is the Chief Investment Officer NYS



Aksia David Sheng Managing Director



Nicole Musicco Chief Investment Office CalPERS



CalSTRS Christopher Ailman



CalSTRS LaShae Badelita Investments Diversity Officer



Callan Ron Peyton Executive Chairman



Cambridge Associates Jasmine Richards Sr. Investment Dir., Head of Diverse Mgr. Research



M2M André Rice President



Meketa Investment Group Amy Hsiang Managing Principal & Director of Public Markets



Meketa Investment Group John Haggerty Managing Principal & Director of Private Markets



CTPF Fernando Vinzons



Crewcial Partners Angela Outlaw-Matheny Dir. of Investment Staff & Diverse Manager Equity



ERS of Texas David Veal CIO



Fairview Capital Partners JoAnn Price Co-Founder and Managing Partner



Federal Reserve Employee Benefits System William Clark Senior Vice President & CEO



GCM Grosvenor Derek Jones Managing Director



GCM Grosvenor Renae Griffin Executive Director



Invesco Private Capital Cindy Chong Senior Associate



LAFPP Tom Lopez Interim CIO



Hamilton Lane Katie Moore Sobuto Managing Director



Hamilton Lane Paul Yett Director of ESG & Sustainability



HarbourVest Partners, LLC Edward Power Managing Director



HarbourVest Partners, LLC Sanjiv Shah Managing Director



IMRF Angela Miller-May



ISBS Johara Farhadieh Executive Director & CIO



Invesco Private Capital Alan Weinfeld Partner



LACERS Rodney June



LACERA Jonathan Grabel CIO