



Northeast Private Equity Conference

January 21-22, 2026 | Lotte New York Palace | New York, NY

CONFERENCE WORKING AGENDA 12 JANUARY 2026

WEDNESDAY, JANUARY 21

- 9:00 a.m. **Conference Registration Opens**
Check in at the registration desk to receive your name badge. Your name badge is required for admittance to all sessions and conference spaces.
- 9:00 a.m. – 4:30 p.m. **Open Meeting Networking**
Plan ahead! Use the Conference App to book meetings and connect at pre-assigned networking tables. Enjoy complimentary refreshments and a light lunch while you build valuable relationships.
- 11:30 a.m. - 2:00 p.m. **WINC Activity – MoMA and Modern Women**
Learn about women artists and their lasting influence. This tour will feature work by women artists on view as part of the Museum's Collection Galleries, spanning from 1880 to today. Featured artists on the tour may include Frida Kahlo, Helen Frankenthaler and Ana Mendieta. The guided tour will examine work across different mediums and discuss the context and legacy of these works. Light refreshments will be served at the hotel before the tour.
(Advanced registration required, please.)
- 3:00 – 3:45 p.m. **Welcome to Our General Session**
A warm welcome and opening remarks from the regional council chair.
Seth Friedman, Managing Director, Abacus Finance
Northeast Regional Council Chair

General Session Programming to be announced.
- 3:45 - 4:30 p.m. **Networking Refreshment Break**
Take a moment to re-energize and reconnect with peers over light refreshments.
- 4:30 - 5:30 p.m. **A Look Ahead: LP Perspectives on the 2026 Investing Environment**
A timely conversation about investment activity and allocations from top SBIC investors. How are GPs differentiating themselves in such a competitive environment? What are LPs looking for in potential fund investments? How do you build and maintain effective GP-LP relationships? Don't miss this valuable discussion.
Michael Lasch, Managing Partner, Pine Street Capital, Moderator
Jan Bergeson, Executive Director & CRA Officer, Ally Bank
Matthew Maciaszek, Portfolio Manager, Kemper Corporation
Fitz Smoak, CFA, CAIA, Sr. Investment Research Analyst, HB Wealth
Scott Stoveken CFA, Investment Management & Research, BNY
- 5:30 - 7:00 p.m. **Finding Deals and Building Networks Cocktail Reception**
Kick off the year with meaningful connections! Join us for an evening of cocktails and conversation at the Northeast's premier networking event—where deals begin and relationships grow.



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THURSDAY, JANUARY 22

- 7:30 a.m. **Conference Registration Opens**
Check in at the registration desk to receive your name badge. Your name badge is required for admittance to all sessions and conference spaces.
- 7:30 - 9:00 a.m. **Networking Breakfast**
Enjoy a full buffet breakfast while connecting with industry colleagues.
- 7:30 - 9:00 a.m. **Policy Breakfast for Lawyers and Accountants**
Policy discussions designed for SBIA legal and accounting members who serve the industry. *(By invitation, please.)*
Justin Pelletier, Head of Government Relations, Small Business Investor Alliance
- 9:00 - 9:05 a.m. **Welcome and Sponsor Recognition**
Seth Friedman, Managing Director, Abacus Finance
Northeast Regional Council Chair
- 9:05 - 10:00 a.m. **Speed Panel: Timely Updates and Predictions by Each SBIA Industry Vertical - SBICs, PE Funds, Limited Partners and Investment Banks**
Dan Gaspar, Partner, TZP Group, Moderator
Kerri Hagen, Managing Director, Cascadia Capital
Sean McGuire, Managing Director, Fifth Third Bank
Peter Rothschild, Managing Partner, RF Investment Partners LLC
Neil Shah, Partner, Brookside Capital Partners
- 10:00 - 10:45 a.m. **Networking Refreshment Break**
Recharge and reconnect during this break between sessions.
- 10:45 - 11:30 a.m. **CEO Confidential: Observations on Pre and Post Investment Decisions**
A unique opportunity to hear directly from experienced CEOs on the negotiating and investment process.
Steve Gord, Partner, Hidden River Strategic Capital, Moderator
Marina Gregory, CEO, Catalyst MXE
Tim Grogan, Former CEO Craftmaster Hardware
Garrett Taylor, CEO, Coastline Wealth Management
Chris Whitney, Founder & CEO, Miles Ahead Brands
- 11:30 a.m. - 12:30 p.m. **Update from SBA's Investment Division Chief**
An introductory conversation with SBA's newly appointed leader of the Office of Investment and Innovation to learn about the Administration's SBIC priorities and initiatives.
Josh Carter, Associate Administrator, Office of Investment & Innovation, U.S. Small Business Administration
Brett Palmer, President, Small Business Investor Alliance



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12:30 - 1:00 p.m.

Networking Lunch: Grab & Go or Stay and Connect

Grab a quick bite for the road or stick around to share lunch and insights with colleagues.

1:00 p.m.

Conference Adjourns

We look forward to seeing you in Nashville for the
[Southern Private Equity Conference | February 19-20, 2026](#)