

2025 Agenda

January 6, 2025
Program Orientation &
Onboarding

This first call will go over the Rising Leaders 2025-2026 program curriculum, expectations, and associated events.

January 30, 2025
IPA Alts Leaders: Stories of
Leadership and Success

Join us for an inspiring launch to the Rising Leaders Program with this session, which will showcase distinguished Board members from the Institute for Portfolio Alternatives (IPA). Speakers will delve into their unique career trajectories, discussing the challenges they faced and the key moments that defined their careers and leadership approaches.

During this session, Rising Leaders will:

- Learn how to develop decision-making skills
- Explore how to build resilience in challenging times
- Consider how to leverage the power of mentorship to succeed

February 18, 2025
IPACONnect Private Markets
Dine Around

Join us at IPACONnect Private Markets for a dine around for our Rising Leaders. This event is on February 18-21 in Newport Beach, CA.

February 27, 2025
Developing Core Leadership
Competencies: Building a
Foundation for Growth

This month, Rising Leaders will focus on the key skills and attributes that drive leadership excellence and career growth. By identifying strengths and areas for improvement, Rising Leaders will craft a personalized development plan, empowering them to take control of their career and build a solid foundation for future success.

During this session, Rising Leaders will:

- Explore crucial areas like self-awareness, emotional intelligence, and strategic thinking
- Learn actionable strategies to strengthen these competencies
- Craft a personalized development plan



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March 27, 2025

Understanding Private Credit: Opportunities and Strategies

In this session, Rising Leaders will delve into the evolving landscape of private credit, examining its structure, benefits, and associated risks. Participants will discover how private credit can enhance a diversified investment portfolio, providing unique opportunities for returns and capital preservation. Industry experts will share valuable insights on different types of private credit instruments, current market trends, and effective strategies for navigating this asset class.

During this session Rising Leaders will:

- Understand the foundational elements of private credit, including its various structures and how it differs from traditional lending
- Identify the benefits of incorporating private credit into an investment portfolio, as well as the potential risks and challenges associated with this asset class
- Gain insights into various private credit instruments, such as direct lending, mezzanine financing, and distressed debt, and their roles in investment strategies
- Examine current trends in the private credit market, including investor demand, regulatory developments, and economic factors influencing opportunities

May 2, 2025

Navigating the Regulatory Landscape in Alternative Investments

(Rising Leaders invited to lunch with the IPA Board of Directors on April 30.)

Join us at IPASummit for an in-depth session on the latest regulatory developments affecting alternative investments. The alternative investment space is growing rapidly, driven by innovation and the demand for diversification beyond traditional markets. However, this growth comes with an increasingly complex web of regulations and compliance challenges. Through interactive discussions and case studies, attendees will gain actionable insights to confidently navigate regulatory challenges while driving innovation and growth in their organizations.

Learning Objectives:

- Understand key regulatory frameworks shaping the industry, including the SEC's evolving oversight
- Explore best practices for mitigating risks and maintaining compliance in a shifting legal environment
- Learn about the IPA's advocacy efforts and how you can become involved in public policy efforts

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May 29, 2025

Communication Best Practices for Effective Leadership in Alternative Investments

In this dynamic session, Rising Leaders will explore the key communication strategies that set effective leaders apart in a fast-paced and competitive environment. Through interactive discussions and industry-specific case studies, speakers will review techniques for active listening, delivering constructive feedback, and adapting communication styles to meet the needs of various audiences, including investors, clients, and cross-functional teams.

During this session, Rising Leaders will:

- Explore essential communication strategies for leaders including active listening, delivering constructive feedback, having empathy, and more
- Understand how to tailor your communication style to resonate with different audiences, including investors, clients, and cross-functional teams, enhancing clarity and impact
- Equip yourself with techniques to improve your leadership presence and influence through effective communication, inspiring confidence and collaboration among your team and stakeholders

June 26, 2025

Exploring Private Equity: Strategies for Success

In this session on private equity, Rising Leaders will gain a comprehensive overview of the asset class, covering its structure, investment strategies, and the value it brings to the marketplace. Participants will learn about the different stages of private equity investment, from venture capital to buyouts, and how to effectively evaluate opportunities within this dynamic field. Industry experts will share valuable insights on current market trends, due diligence processes, and best practices for successful investments.

During this session, Rising Leaders will:

- Understand the foundational elements of private equity, including its structure, characteristics, and how it differs from other investment vehicles
- Explore the various stages of private equity investment, including venture capital, growth equity, and buyouts, and understand their specific dynamics and risk profiles
- Learn how to effectively assess and evaluate private equity opportunities, taking into account factors such as market potential, management teams, and competitive landscape
- Understand the key components of the due diligence process in private equity investments, including financial analysis, operational assessments, and legal considerations

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July 24, 2025

Navigating Conflicts: Managing and Resolving Difficult Situations

Effectively managing difficult interactions and resolving conflicts is a crucial skill for leaders and for fostering strong teams. In this session, Rising Leaders will explore techniques specifically designed for navigating conflicts and how to reframe conflicts as opportunities for growth and collaboration, enabling stronger relationships and enhancing team dynamics.

During this session, Rising Leaders will:

- Recognize common sources of conflict including stakeholder differences, market pressures, and team dynamics
- Learn techniques to manage emotions and reactions in high-stress situations, ensuring professionalism and composure during difficult conversations
- Explore proven conflict resolution strategies, including negotiation techniques and collaborative problem-solving, to address and resolve disputes effectively

September 19, 2025

Speaking With Confidence Part I: Strategies for Effective Communication

Great leaders inspire, persuade, and connect with their audiences—whether in boardrooms, client meetings, or on stage. Yet, public speaking can be intimidating. Join us at IPAVision for part I of this two part series on public speaking, which will offer a fresh approach to building communication skills by incorporating improv techniques, fostering confidence, adaptability, and authentic delivery. This interactive offering will help equip attendees with the communication skills they need to lead with impact, build trust, and foster collaboration in the fast-paced world of alternative investments.

Learning Objectives:

- Learn strategies for building ability and confidence in public speaking and how to develop a commanding presence
- Explore how using improv-based tools can help with public speaker and handling unexpected questions or situations with poise
- Discover how to craft compelling narratives that resonate with diverse audiences, from investors to colleagues

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Navigating Real
Estate Investments:
Strategies and
Insights

In this session, Rising Leaders will gain a comprehensive understanding of real estate as a vital component of alternative investments. Participants will learn about the various types of real estate investments, including commercial, residential, and Real Estate Investment Trusts (REITs), while gaining insights into effective due diligence and valuation techniques. Industry experts will share their knowledge on current market trends, associated risks, and strategies for creating a diversified real estate portfolio within the broader context of alternative investments.

During this session, Rising Leaders will:

- Gain a solid understanding of real estate's role as an asset class within alternative investments, including its benefits and risks compared to traditional investments
- Explore the different types of real estate investments, such as commercial properties, residential properties, and REITs, and understand their unique characteristics and potential returns
- Learn effective due diligence techniques to assess real estate investments, including market analysis, property inspections, and financial modeling
- Understand various valuation methods used in real estate investments, such as income approach, cost approach, and sales comparison, to make informed investment decisions

November 20, 2025
Leveraging
Negotiation as a
Strategic Tool in
the Alternative
Investment
Industry

Negotiation is a critical skill in the alternative investment industry, whether influencing stakeholders, securing capital, or managing investor relationships, or collaborating with cross-functional teams, this session will provide attendees with essential techniques and strategies to negotiate effectively in a fast-paced, high-stakes environment.

During this session, Rising Leaders will:

- Learn how to identify and analyze the interests and perspectives of all parties involved in a negotiation to find common ground and create win-win solutions
- Explore common challenges and pitfalls in negotiations and develop strategies to navigate them effectively, ensuring smoother negotiations
- Formulate a personalized action plan to implement the negotiation skills learned in the session, equipping you to tackle future negotiations with confidence