



WP GLOBAL PARTNERS

2025 ANNUAL MEETING AGENDA

Time	Function	Location
SUNDAY, FEBRUARY 23, 2025		
5:30 PM – 6:00 PM	COCKTAILS	Proof Patio
6:00 PM – 8:00 PM	DINNER	
MONDAY, FEBRUARY 24, 2025		
6:45 AM – 8:00 AM	BREAKFAST	Pinnacle Foyer
ADVISORY BOARD MEETINGS <i>(Investors Only)</i>		
7:00 AM – 7:30 AM	Private Debt Strategy III Advisory Board	Troon A/B
7:30 AM – 8:30 AM	COREalpha IV Advisory Board	Troon A/B
8:30 AM – 9:30 AM	COREalpha V Advisory Board	Troon A/B
9:30 AM – 10:30 AM	COREalpha VI Advisory Board	Troon A/B
10:30 AM – 10:45 AM	BREAK	Troon A/B
10:45 AM – 11:15 AM	COREalpha VII Advisory Board	Troon A/B
11:15 AM – 12:00 PM	WP Expansion Advisory Board	Troon A/B
12:00 PM – 1:00PM	LUNCH	Fountain Terrace
1:00 PM – 3:00 PM	Santander Portfolio Updates <i>(Santander Only)</i>	Reata
2:00 PM – 3:30 PM	HCIP Advisory Board Meeting <i>(HCIP Investors Only)</i>	Troon A/B
3:30 PM – 4:30 PM	EnBW Portfolio Updates <i>(EnBW Only)</i>	Reata
6:00 PM – 9:00 PM	WELCOME RECEPTION – Registration, Cocktails & Dinner	Ironwood Terrace
TUESDAY, FEBRUARY 25, 2025		
7:00 AM – 8:00 AM	BREAKFAST	Pinnacle Foyer
8:00 AM – 8:15 AM	Opening Remarks Donald W. Phillips <i>WP Global Partners</i>	Pinnacle Ballroom
8:15 AM – 9:10 AM	RISK OF WAR ON TWO CONTINENTS & THE ECONOMIC & POLICTICAL CONSEQUENCES General Jack Keane (United States Army, Retired) <i>Chairman, Institute for the Study of War</i>	Pinnacle Ballroom
9:10 AM – 10:05 AM	CONSEQUENCES OF A PLUMMETING BIRTH RATE INTERNATIONALLY Melissa S. Kearney, Ph.D. <i>Author & Neil Moskowitz Professor of Economics, University of Maryland</i>	Pinnacle Ballroom

Time	Function	Location
10:05 AM – 10:20 AM	BREAK	Pinnacle Ballroom
10:20 AM – 11:15 AM	GENERATIONAL DIFFERENCES & WHAT THEY MEAN FOR AMERICA'S FUTURE Jean M. Twenge, Ph.D. <i>Author & Professor of Psychology, San Diego State University</i>	Pinnacle Ballroom
11:15 AM – 12:10 PM	WASHINGTON POLITICAL INSIGHT Charles E. Cook, Jr. <i>Founder of The Cook Political Report</i> <i>Political Analyst for the National Journal</i>	Pinnacle Ballroom
12:10 PM – 1:10 PM	LUNCH	Fountain Terrace
PORTFOLIO COMPANY PRESENTATIONS		
1:10 PM – 1:20 PM	Portfolio Company Presentations Introduction J.F. Berry <i>WP Global Partners</i>	Pinnacle Ballroom
1:20 PM – 1:45 PM	Nationwide Medical David Siegel <i>Chief Executive Officer</i>	Pinnacle Ballroom
1:45 PM – 2:10 PM	Agrovision Steve Magami <i>Co-Founder, CEO and Executive Chairman</i>	Pinnacle Ballroom
2:10 PM – 2:35 PM	Union Credit Barry Kirby <i>Co-Founder & Chief Revenue Officer</i>	Pinnacle Ballroom
2:35 PM – 2:45 PM	BREAK	Pinnacle Ballroom
2:45 PM – 3:10 PM	Solace Shawn McAllister <i>Chief Technology Officer & Chief Product Officer</i>	Pinnacle Ballroom
3:10 PM – 3:35 PM	Arctos Sports Partners Forrest Richmond <i>Director</i>	Pinnacle Ballroom
3:35 PM – 3:40 PM	Closing Summary Donald W. Phillips <i>WP Global Partners</i>	Pinnacle Ballroom
5:30 PM – 6:00 PM	COCKTAIL RECEPTION	Pinnacle Foyer
6:00 PM – 7:15 PM	DINNER	Pinnacle Ballroom
7:15 PM – 9:00 PM	Songwriter Entertainment Showcase Lee Thomas Miller, Songwriter & Producer Wendell Mobley, Singer & Songwriter	Pinnacle Ballroom

Time	Function	Location
9:00 PM – 11:00 PM	Evening Networking & Fireside S'mores	Fountain Terrace
WEDNESDAY, FEBRUARY 26, 2025		
7:00 AM – 8:00 AM	BREAKFAST	Pinnacle Foyer
8:00 AM – 8:30 AM	New Year – New Rules Donald W. Phillips <i>WP Global Partners</i>	Pinnacle Ballroom
8:30 AM – 8:45 AM	WP Global 2024 Performance Jennifer Concannon <i>WP Global Partners</i>	Pinnacle Ballroom
8:45 AM – 9:15 AM	Lucid Investing in Private Equity Gregory S. Oberholtzer <i>WP Global Partners</i>	Pinnacle Ballroom
9:15 AM – 10:45 AM	Panel: Investing, Executing & Being Successful in the Defense Sector Moderator: Austin Rehm , <i>Vice President, WP Global Partners</i> Guest Speakers: <ul style="list-style-type: none"> — Brooke Coburn, <i>Co-Founder & Partner, Capitol Meridian Partners</i> — Seth Harvey, <i>Co-Founder & Chief Executive Officer, Bluestaq</i> — Daniel Jaffe, <i>Partner, 9Yards Capital</i> — Tad Mielnicki, <i>Founder & Chief Executive Officer, Larx</i> — Kevin O'Neil, <i>Chief Investment Officer, ONE Bow River</i> 	Pinnacle Ballroom
10:45 AM – 11:00 AM	Closing Remarks Donald W. Phillips <i>WP Global Partners</i>	Pinnacle Ballroom
11:30 AM – 1:00 PM	LUNCH	Fountain Terrace
1:00 PM – 4:00 PM	Small Group Discussions & Activities Investment Team, General Partners and Limited Partners	Fountain Terrace
6:00 PM – 8:30 PM	OFF-SITE LIMITED PARTNER DINNER (Meet in Lobby at 5:30 pm; Shuttle Departs Promptly at 5:45 pm)	Preston's Steakhouse