

THURSDAY, MAY 12	
JW Marriott Essex House New York - Central Park Ballroom, 2nd Floor	
7:00 AM	CONFERENCE REGISTRATION & BREAKFAST
	INVESTMENT STRATEGY & INTEREST RATES
8:00 AM	MARKET OUTLOOK Brian Belski, Chief Investment Strategist, Global Markets, BMO Capital Markets
8:30 AM	RISING RATES AND STAGFLATION RISK Ian Lyngen, Head of U.S. Rates Strategy, BMO Capital Markets
	THEMATIC PANELS
9:00 AM	STORAGE: PEAK FUNDAMENTALS FACING HOUSING STORM CLOUDS Joe Margolis, CEO, Extra Space Storage Liz Raun Schlesinger, Founder & CEO, Merit Hill Capital Mike Burnam, CEO, StorageMart <i>Moderated by: Juan Sanabria, U.S. Real Estate Analyst, BMO Capital Markets</i>
10:00 AM	RETAIL: STATE OF THE MARKET AS INFLATION SQUEEZES CONSUMER Steven Levin, CEO, Centennial Real Estate Richard Latella, Executive Managing Director, Cushman & Wakefield Conor Flynn, CEO, Kimco Realty <i>Moderated by: Juan Sanabria, U.S. Real Estate Analyst, BMO Capital Markets</i>
11:00 AM	OFFICE: THE OFFICE RECOVERY DEBATE Owen Thomas, CEO, Boston Properties Paul Amrich, Vice Chairman, CBRE Sandeep Mathrani, CEO, WeWork <i>Moderated by: John Kim, U.S. Real Estate Analyst, BMO Capital Markets</i>
12:00 PM	PRIVATE EQUITY: VIEWS FROM THE PRIVATE SIDE Lowell Baron, Managing Partner & CIO, Brookfield Real Estate Lora Gotcheva, Managing Director, CPP David Hodes, Founder & Co-Managing Partner, Hodes Weill <i>Moderated by: Steve Richford, MD & Head of U.S. Real Estate, BMO Capital Markets</i>
1:00 PM	NETWORKING BREAK
2:00 PM	HOTELS: POSITIONING FOR THE FUTURE Sourav Ghosh, CFO, Host Hotels & Resorts Gilda Perez-Alvarado, Global CEO, JLL Hotels & Hospitality Mit Shah, CEO, Noble Investment Group <i>Moderated by: Ari Klein, U.S. Real Estate Analyst, BMO Capital Markets</i>
3:00 PM	ESG: REAL ESTATE SHADES OF GREEN Michael Beckerman, CEO, CREtech Climate Dana Schneider, SVP, Director of Energy, Sustainability & ESG, Empire State Realty Trust <i>Moderated by: John Kim, U.S. Real Estate Analyst, BMO Capital Markets</i>
3:50 PM	END OF CONFERENCE