

You are invited to attend



# Annual Investment Summit 2026

Summit and Limited Partner Advisory Committee Meetings

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**March 3-4, 2026**

**Hôtel Swexan**

2575 McKinnon Street, Dallas, TX

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Join us at the Hôtel Swexan in the Harwood District of Dallas.



Torchlight is delighted to present an exclusive conversation with the 43<sup>rd</sup> President of the United States, **George W. Bush**

**[Register](#)**

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# Agenda – Tuesday, March 3<sup>rd</sup>



## Event & Dinner

 [The Mansion Restaurant, 2821 Turtle Creek Boulevard, Dallas, TX, 75219](#)

**4:45pm:** Welcome Reception at **Hôtel Swexan, 6<sup>th</sup> Floor**

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**5:30pm:** An exclusive conversation with **43<sup>rd</sup> President of the United States, George W. Bush**

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**6:30pm:** Transportation to **The Mansion Restaurant**

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**7:00pm:** Reception and Dinner

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**9:00pm:** After-Dinner Drinks

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*All times are shown in Central Standard Time (CST)*

# Agenda – Wednesday, March 4<sup>th</sup>

## 2026 Annual Investment Summit Meetings

 [Hôtel Swexan, 2575 McKinnon Street, Dallas, TX 75201](#)



7:00am:	Breakfast
8:00am:	Welcome
8:05am:	Debt Fund VI Portfolio Overview
8:35am:	Debt Fund VII Portfolio Overview
9:15am:	Break
9:30am:	Market Update
9:50am:	Debt Fund VIII Portfolio Overview
10:10am:	Distressed Debt Fund Portfolio Overview
10:30am:	Break
10:40am:	<b>Property Tour: Devi at Valley Ranch</b>
12:40pm:	Lunch
1:30pm:	Debt Fund VI Advisory Committee Meeting
2:00pm:	Debt Fund VII Advisory Committee Meeting
2:00pm:	Real Estate Tour of Hôtel Swexan
2:30pm:	Debt Fund VIII Advisory Committee Meeting
3:00pm:	Distressed Debt Fund Advisory Committee Meeting
3:30pm:	Break
4:30pm:	Local Experience followed by Dinner at <b>River Ranch Educational Charities</b>
8:00pm:	After-Dinner Drinks

*All times are shown in Central Standard Time (CST)*

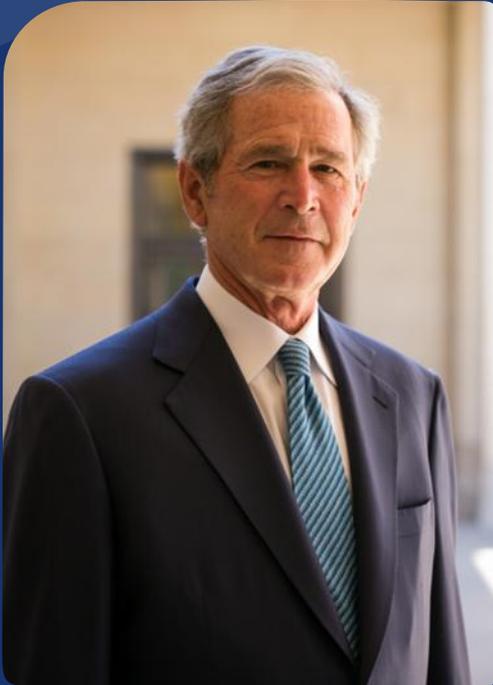
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# Keynote Conversation



## President George W. Bush

43<sup>rd</sup> President of the United States of America

Founder of the George W. Bush Presidential Center

George W. Bush served as 43rd President of the United States of America from 2001 to 2009. As Commander in Chief, President Bush worked to expand freedom, opportunity, and security at home and abroad. He entered office with a robust domestic agenda. His first initiative as President was the No Child Left Behind Act, a bipartisan measure that raised standards in schools, insisted on accountability in return for federal dollars, and led to measurable gains in achievement – especially among minority students. Faced with a recession when he took office, President Bush cut taxes for every federal income taxpayer, which helped lead to an unprecedented 52 straight months of job creation. New free trade agreements enacted by the Bush Administration opened up American goods and services to new markets of more than 130 million consumers. Additionally, President Bush worked with Congress to modernize Medicare with a prescription drug benefit and introduced market forces to the healthcare system by establishing Health Savings Accounts. The Bush Administration also focused on a variety of environmental issues, including efforts to reduce emissions and create the world's largest marine protected area.

President Bush grew up in Midland, Texas, as the eldest son of Barbara and George H.W. Bush – later the 41st President of the United States. He received a bachelor's degree in history from Yale University and a master's degree in business administration from Harvard Business School. President Bush also served as a pilot in the Texas Air National Guard. In 1995, he was sworn in as the 46th Governor of Texas.

After the Presidency, President and Mrs. Bush founded the George W. Bush Presidential Center in Dallas, Texas, a nonpartisan organization advancing the timeless values of freedom, opportunity, accountability, and compassion. The Bush Center comprises the George W. Bush Presidential Library, which is operated by the National Archives and Records Administration, as well as the George W. Bush Presidential Museum and the George W. Bush Institute, a nonpartisan public policy and leadership development center that engages communities across the United States and around the world by developing leaders, advancing policy, and taking action to solve today's most pressing challenges.

# Torchlight Speakers



## Vadim Blikshteyn

Managing Partner  
Chief Financial Officer

Vadim is a Managing Partner and Chief Financial Officer as well as a member of the Management Committee. In his role, Vadim oversees the firm's accounting and operational functions including corporate and fund accounting, fund operations, information technology, and compliance. Vadim also supports our special servicing and workout services business. He has 16 years of professional experience.

Prior to Torchlight, Vadim worked in various accounting and audit roles at Baker Tilly Virchow Krause, LLP and Holtz Rubenstein Reminick, LLP.

Vadim is a Certified Public Accountant in the State of New York and holds a BS from Brooklyn College – City University of New York.



## Samuel Chang

Managing Partner  
Portfolio Management

Sam is the Managing Partner of the portfolio management group as well as a member of the Investment and Management Committees. In his role, Sam oversees portfolio structuring and asset allocation, and leads the acquisitions process for public commercial real estate investments. He brings 27 years of professional experience, all with Torchlight.

During his 27-year tenure at Torchlight, Sam has worked in a trading capacity across multiple market cycles and has actively traded CMBS throughout the capital stack while leading the firm's public investment acquisitions. In addition, he has been responsible for portfolio structuring across Torchlight's real estate debt strategies, helping to shape investment execution and risk management firmwide.

Sam holds a BS from Columbia University.

# Torchlight Speakers



## Alexandra Crawley

Senior Vice President

Alex is a Senior Vice President in the credit group where she focuses on underwriting, due diligence, and structuring real estate credit investment opportunities. She has 14 years of investment experience.

Prior to joining Torchlight in 2018, Alex held positions at Stonebeck Capital, Guggenheim Partners, and Antheus Capital.

Alex holds a BA from Columbia University.



## Felipe Dorregaray

Managing Partner  
Chief Operating Officer

Felipe is a Managing Partner and Chief Operating Officer as well as a member of the Management Committee. In his role, Felipe oversees the Firm's Investor Relations and Operational functions, including Client Service, Fund Formation, and Financial Control. In addition, he is responsible for optimizing internal processes and supporting risk management, special servicing, and workout services business. He has 29 years of professional experience.

Prior to joining Torchlight in 2018, Felipe worked in various leadership roles at The Carlyle Group / Metropolitan Real Estate Equity Management, LLC, ABN AMRO, Inc., and Salomon Smith Barney, Inc.

Felipe holds an MBA from The American University and a BS from the University of Miami.

# Torchlight Speakers



**Brandon Duplain**

Vice President

Brandon is a Vice President in the acquisitions group. In his role, he is responsible for sourcing, evaluating, and executing private real estate investments. Brandon has 12 years of professional experience.

Prior to joining Torchlight in 2020, Brandon worked at Allegiant Real Estate Capital, First Key Lending (Cerberus Capital), and Doral Property Finance. Brandon holds a BS from Syracuse University.



**Daniel Greenholtz**

Managing Partner  
Asset Management and Credit

Dan is the Managing Partner of the asset management and credit groups as well as a member of the Investment and Management Committees. Dan oversees asset management across the Firm as well as the underwriting and credit functions. He also focuses on our special servicing and workout services business. Dan has 21 years of professional experience.

Prior to joining Torchlight in 2011, Dan worked in various real estate investment roles at CWCapital and SNS Property Finance focused on underwriting, asset management, workouts, and capital markets.

Dan holds a BA from the University of Maryland.

# Torchlight Speakers



## Daniel Heflin

Managing Partner  
Chief Investment Officer

Dan founded Torchlight in 1995 and serves as a Managing Partner and Chief Investment Officer. He is a member of the Investment and Management Committees. Dan is responsible for guiding the Firm's strategic direction and overseeing its investment philosophy and priorities. Over his three decades with the firm, Dan has helped guide the investment of more than \$30 billion of equity capital across real estate debt and equity transactions for Torchlight's institutional clients. He brings 38 years of experience in real estate, credit, and finance.

Prior to Torchlight, Dan worked at Ocwen Financial Corporation, Credit Suisse, and Arthur Andersen. While with Arthur Andersen, Dan received his Certified Public Accountant license in the State of New York.

He holds an MS from the London School of Economics and Political Science and a BBA from Texas Christian University.



## Tamir Kazaz

Managing Partner  
Investments

Tamir is a Managing Partner as well as a member of the Investment and Management Committees. In his role, he provides leadership across the investment business and oversees business development efforts for Torchlight's special servicing platform. He has 29 years of professional experience.

Prior to joining Torchlight in 2024, Tamir held various leadership roles at Meridian Capital Group, Clal Insurance, Africa Israel USA (AFI), KPMG (Israel), and several other public and private companies in managerial positions.

Tamir is a Certified Public Accountant in Israel and holds an MBA from Tel Aviv University and a BA from The College of Management Academic Studies (Israel).

# Torchlight Speakers



## Terence Kennelly

Senior Vice President

Terence is a Senior Vice President in the investor relations group where he focuses on investor relations and capital raising initiatives. He has 15 years of professional experience.

Prior to joining Torchlight in 2025, Terence was an Executive Director at Mack Real Estate Group where he managed the firm's private fund investor relations and client services program. He previously worked in investor relations positions at The Carlyle Group and Oaktree Capital Management.

Terence is a CAIA Charterholder and CFP® professional and holds a BS from Skidmore College.



## Jason Kerr

Managing Partner  
Chief Compliance Officer and  
General Counsel

Jason is a Managing Partner, Chief Compliance Officer and General Counsel as well as a member of the Management Committee. In his role, he is responsible for overseeing the Firm's compliance program and day-to-day legal operations. Jason also supports our special servicing and workout services business. Jason has 23 years of professional experience.

Prior to joining Torchlight in 2024, Jason served in various leadership roles including as a shareholder at Robinson Bradshaw, where he served as co-chair of the Private Funds Practice Group, and at The Carlyle Group / Metropolitan Real Estate Equity Management, LLC, where he served as Chief Compliance Officer and Counsel. Jason began his career at Akin Gump Strauss Hauer & Feld LLP.

Jason holds a JD from Columbia University and a BA from University of California, Berkeley.

# Torchlight Speakers



## Daniel Lockwood

Managing Partner  
Private Acquisitions

Dan is the Managing Partner of the private acquisition group as well as a member of the Investment and Management Committees. In his role, he leads the sourcing, evaluating, and execution of private real estate investment opportunities. Dan has 24 years of professional experience.

Prior to joining Torchlight in 2017, Dan held senior roles in real estate at several leading global firms, including Guggenheim Partners, Zurich Alternative Management, and Credit Suisse.

Dan holds a BS from Pennsylvania State University.



## Claire McIntyre

Managing Partner  
Investor Relations

Claire is the Managing Partner of the investor relations group as well as a member of the Management Committee. In her role, she is responsible for overseeing the Firm's investor relations program including investor engagement, strategic relationship management, and day-to-day communications with institutional partners, as well as capital raising initiatives. Claire has 28 years of professional experience.

Prior to joining Torchlight in 2025, Claire served as Global Head of Corporate and Public Affairs at Oxford Properties Group, where she built deep expertise in real estate investment and institutional relationship management. She also sat on the firm's Executive and Operating Committees.

Claire holds an MBA from The University of Western Ontario and a BA from Toronto Metropolitan University.

# Torchlight Speakers



## Gianluca Montalti

Managing Partner  
Investment Strategy

Luca is a Managing Partner in the investment strategy and asset management groups as well as a member of the Investment and Management Committees. He plays a key role in shaping and executing the Firm's investment approach across performing and non-performing debt strategies, encompassing the full lifecycle from initial investment through asset management and resolution. Luca has 28 years of professional experience.

Prior to joining Torchlight in 2010, Luca held various asset management leadership roles at Investcorp International, Greenstreet Real Estate Partners, and LaSalle Investment Management where he oversaw diversified real estate portfolios and worked closely with investors, joint venture partners, and lenders.

Luca holds an MBA from the University of Chicago and a BBA from the University of Michigan.



## Brian Sedwitz

Director

Brian is a Director in the portfolio management group where he focuses on sourcing public commercial real estate investments and portfolio management across the Firm's strategies including special servicing and workout services. Brian has 16 years of professional experience.

Prior to joining Torchlight in 2012, Brian worked at K2 Advisors as an analyst.

Brian is a CFA Charterholder and holds a BS from Georgetown University.

# Torchlight Speakers



**Ryan Walters**

Director

Ryan is a Director in the asset management group where he focuses on monitoring loan performance, managing borrower relationships, and engaging with borrowers and partners to maintain portfolio quality and execution. He has 15 years of professional experience across real estate, credit, and investment management.

Prior to joining Torchlight in 2015, Ryan worked at Ernst & Young LLP and Cushman & Wakefield, where he focused on real estate valuation and securitization due diligence.

Ryan holds a BA from Lehigh University.

# Accommodations



## Room Block

### The Hôtel Swexan

2575 McKinnon Street, Dallas, TX 75201

+1-469-405-1911

[Link to Hotel](#)

[Link to Hôtel Swexan  
Room Block](#)

Kindly request the *Torchlight Investors  
Room Block*

## Other Nearby Hotels

### Magnolia Hotel Dallas Downtown

1401 Commerce Street, Dallas, TX 75201

+1-214-915-6500

[Link to Hotel](#)

### Homewood Suites by Hilton

3750 Bargain Way, The Colony, TX 75056

+1-833-320-8284

[Link to Hotel](#)

### Hilton Garden Inn

1600 Pacific Avenue, Dallas, TX 75201

+1-214-299-8982

[Link to Hotel](#)