

DFW Institutional Investment FORUM
August 17, 2021 - Roundtable Discussion
Private Equity

Topic: **“Private equity investing in a covid recovery environment”**

Moderator: **Mark A. Andes**, Manager of Investment Management Research, DeMarche Associates

Panelists: **Meena A. Gandhi**, Managing Director, Private Equity, JP Morgan Asset Management

Ben Moe, Managing Partner, Osceola Capital Management

Bryan Nelson, Principal, Pathway Capital Management

Mark A. Andes, Manager of Investment Management Research, DeMarche Associates

Mark Andes is a Consultant and Manager of Research for alternative assets at DeMarche. He is a member of both the traditional and alternative DeMarche Manager Review Committees (MARC) and is a supervisor of the firm’s analysts. Mr. Andes serves as Portfolio Manager and Administrator for DeMarche’s discretionary OCIO affiliate, DMS. In addition, Mr. Andes is a frequent speaker at the annual DeMarche Client Conference and the DeMarche Speakers Bureau, addressing topics across all asset classes, including private markets.

Mr. Andes joined DeMarche in 2005 as a Project Analyst and has since provided key leadership for the company’s research efforts. He earned his Bachelor of Science in Business Administration from Southwest Baptist University and holds the FINRA Securities Series 65 license.

Meena A. Gandhi, Managing Director, Private Equity, JP Morgan Asset Management

Meena Gandhi, joined the Private Equity Group in 2006, and has portfolio management, business development and investor relations responsibilities. Prior to joining the Group, she worked in the J.P. Morgan Private Bank, where she advised senior executives on wealth management strategies. An employee of the firm since 2001, Ms. Gandhi also worked in J.P. Morgan’s Corporate Banking Group, where she was responsible for middle market and investment banking opportunities. Ms. Gandhi earned a BA from the University of Texas at Austin, an MBA from Columbia University, and has completed her FINRA Series 3, 7, 24, 30 and 63 certifications.

Ben Moe, Managing Partner, Osceola Capital Management

Ben oversees all aspects of Osceola’s investment activities including the origination, evaluation, and execution of investments. As a member of the Investment Committee, he serves on the boards of several Osceola portfolio companies including Avison Sales Group, 360 Quote, Top Gun Facility Services, Payr, Central Medical Supply Group, Industry Services Co., and Revelation Pharmacy. Ben has completed over 65 M&A transactions to date across a wide variety of industries.

Previously, Ben served as CEO of Avesta Asset Management, a private equity firm focused on value-add multifamily real estate investments. Before Avesta, he was CFO of Advantage Waypoint, an outsourced business services company, where he helped lead the acquisition of 24 businesses before an eventual sale to Apax Partners. Ben also spent six years in the investment banking groups of Bear Stearns and Raymond James and five years as a United States Air Force officer and hospital administrator.

Ben earned an MBA from Duke University and a BS with Distinguished Graduate designation from the United States Air Force Academy. Ben lives in Tampa with his wife and two sons and enjoys fishing and snowboarding.

Bryan Nelson, Principal, Pathway Capital Management

Mr. Nelson joined Pathway in 2011 and is a principal in the California office. His responsibilities include investment analysis and conducting due diligence on primaries, secondaries, and co-investments; investment monitoring; performance analysis; client reporting; and client servicing. Mr. Nelson is also a member of Pathway’s co-investment team. Prior to joining Pathway, Mr. Nelson worked as a senior associate at KPMG. Mr. Nelson received a BA in business economics from the University of California, Santa Barbara, and is a certified public accountant (inactive). Mr. Nelson is a CFA charterholder.