

You're invited to attend



Annual Investment Summit 2025

Summit and Limited Partner Advisory Committee Meetings

February 25- 26, 2025

The Hermitage Hotel

231 6th Ave N, Nashville, TN

Join us at the landmark Hermitage Hotel and explore Nashville's historic sites and lively Broadway Street.



Torchlight is delighted to welcome financial journalist, historian, and founder of *Grant's Interest Rate Observer*, **Mr. James Grant**

[Register](#)

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Agenda – Tuesday, February 25th



Event & Dinner

 [The Twelve Thirty Club, 550 Broadway Street, Nashville, TN 37203](#)


5:00pm:	Gather at the Hermitage Hotel Lobby
5:30pm:	Welcome Reception at The Twelve Thirty Club
6:00pm:	Fireside chat with Dan Heflin, Partner, Co-CIO, & James Grant, Keynote Speaker
7:00pm:	Cocktails & Passed Apps
7:30pm:	Dinner
9:00pm:	After-dinner Drinks

All times are shown in Central Standard Time (CST)

Agenda – Wednesday, February 26th



2025 Annual Investment Summit Meetings

 [The Hermitage Hotel, 231 6th Ave N, Nashville, TN 37219](#)

8:00am:	Breakfast
9:00am:	Opening Remarks & State of the Market
9:20am:	Investment Opportunities & Debt Fund VIII Portfolio Overview
10:10am:	Break
10:25am:	Debt Fund VII Portfolio Overview
10:55am:	Debt Fund VI Portfolio Overview
11:25am:	Break
11:40am:	Debt Fund VII Advisory Committee Meeting
12:10pm:	Debt Fund VI Advisory Committee Meeting
12:40pm:	Lunch
1:40pm:	Debt Fund VIII Advisory Committee Meeting
2:10pm:	Break
2:45pm:	Walking & Property Tour: 1111 Church Street
5:00pm:	Break
6:00pm:	Reception and Dinner at Moto, 1120 McGavock Street
9:00pm:	After-dinner Drinks

All times are shown in Central Standard Time (CST)



Mr. James Grant

Financial Journalist, Author and Historian

Founder & Editor of *Grant's Interest Rate Observer*

James Grant, financial journalist and historian, is the founder and editor of *Grant's Interest Rate Observer*, a twice-monthly journal of the investment markets. His book, *The Forgotten Depression, 1921: The Crash that Cured Itself*, a history of America's last governmentally unmedicated business-cycle downturn, won the 2015 Hayek Prize of the Manhattan Institute for Policy Research. His latest book, *Bagehot: The Life and Times of the Greatest Victorian*, was published in 2019.

Among his other books on finance and financial history are *Bernard M. Baruch: The Adventures of a Wall Street Legend* (Simon & Schuster, 1983), *Money of the Mind* (Farrar, Straus & Giroux, 1992), *Minding Mr. Market* (Farrar, Straus, 1993), *The Trouble with Prosperity* (Times Books, 1996), and *Mr. Market Miscalculates* (Axios Press, 2008).

He is, in addition, the author of a pair of political biographies: *John Adams: Party of One*, a life of the second president of the United States (Farrar, Straus, 2005) and *Mr. Speaker! The Life and Times of Thomas B. Reed, the Man Who Broke the Filibuster* (Simon & Schuster, 2011).

Mr. Grant's television appearances include "60 Minutes," "The Charlie Rose Show," "CBS Evening News," and a 10-year stint on "Wall Street Week". His journalism has appeared in a variety of periodicals, including *The Wall Street Journal*, *Financial Times*, *Foreign Affairs* and *The Claremont Review of Books*. He contributed an essay to the Sixth Edition of *Graham and Dodd's Security Analysis* (McGraw-Hill, 2009).

Mr. Grant, a former Navy gunner's mate, is a Phi Beta Kappa alumnus of Indiana University. He earned a master's degree in international relations from Columbia University, began his career in journalism in 1972, at the Baltimore Sun, and joined the staff of Barron's in 1975. He is a member of the Council on Foreign Relations. He and his wife, Patricia Kavanagh M.D., live in Brooklyn. They are the parents of four grown children.



Samuel Chang

Partner
Co-Head of Portfolio Management

Sam is a Partner and Co-Head of Portfolio Management as well as a member of the Investment and Operating Committees. He has 26 years of professional experience.

Sam holds a BS from Columbia University.



Alexandra Crawley

Senior Vice President
Credit and Underwriting

Alex is a Senior Vice President in the credit and underwriting group. She has 13 years of professional experience. Prior to Torchlight, Alex worked at Antheus Capital, Guggenheim Partners, and Stonebeck Capital.

Alex holds a BA from Columbia University.



Gregory Dineen

Partner
Co-Chief Investment Officer

Greg is a Partner and Co-Chief Investment Officer as well as a member of the Investment and Operating Committees. He has 22 years of professional experience. Prior to Torchlight, Greg worked at B2R Finance (Blackstone), Guggenheim Partners, and Credit Suisse.

Greg holds a BS from Villanova University.



Kaitlyn Furey

Senior Vice President
Client Strategy

Kait is a Senior Vice President in the client strategy group. She has 15 years of professional experience. Prior to Torchlight, Kait worked at Angelo Gordon and PricewaterhouseCoopers.

Kait is a Certified Public Accountant in the State of New York and holds a BS from Villanova University.



Wayne Gavioli

Director
Research

Wayne is a Director of Research. He has 16 years of professional experience.

Wayne is a CFA Charterholder and holds an AB from Harvard University.



Daniel Greenholtz

Partner
Co-Head of Portfolio Management

Dan is a Partner and Co-Head of Portfolio Management. He has 20 years of professional experience. Prior to Torchlight, Dan worked at CWCapital and SNS Property Finance.

Dan holds a BA from the University of Maryland.



Daniel Heflin

Partner
Founder, Co-Chief Investment Officer

Dan is a Partner and Co-Chief Investment Officer as well as a member of the Investment and Operating Committees. Dan is the Founder of Torchlight and has 37 years of professional experience. 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.

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



Heidi Kaufman

Partner
Head of Client Strategy

Heidi is a Partner and Head of Client Strategy as well as a member of the Operating Committee. She has 20 years of professional experience. Prior to Torchlight, Heidi worked at H/2 Capital Partners and Hypo Real Estate.

Heidi holds a BS from Saint Thomas Aquinas College.



Daniel Lockwood

Partner
Co-Head of Private Acquisitions

Dan is a Partner and Co-Head of Private Acquisitions. He has 27 years of professional experience. Prior to Torchlight, Dan worked at World Class Capital Group, Guggenheim Partners, Zurich Alternative Management, and Credit Suisse.

Dan holds a BA from Pennsylvania State University.



Gianluca Montalti

Partner
Head of Asset Management

Luca is a Partner and Head of Asset Management as well as a member of the Investment and Operating Committees. He has 27 years of professional experience. Prior to Torchlight, Luca worked at Investcorp International, Greenstreet Real Estate Partners, and LaSalle Investment Management.

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



Mary Smendzuik

Senior Vice President
Capital Formation

Mary is a Senior Vice President in the investor relations group. She has 18 years of professional experience. Prior to Torchlight, Mary worked at New York Life Real Estate Investors, Capri Capital, Credit Suisse, and Bank of America.

Mary holds an MBA from the University of Michigan and a BA from Michigan State University.



Jonathan Stein

Partner
Co-Head of Private Acquisitions

Jon is a Partner and Co-Head of Private Acquisitions. He has 23 years of professional experience. Prior to Torchlight, Jon worked at Allegiant Real Estate Capital, Realty Finance Trust, Brookfield Asset Management, and Credit Suisse.

Jon holds an MBA from Columbia Business School, a JD from Georgetown University, and a BA from Harvard University.



Ryan Walters

Senior Vice President
Asset Management

Ryan is a Senior Vice President in the asset management group. He has 14 years of professional experience. Prior to Torchlight, Ryan worked at Ernst & Young LLP and Cushman & Wakefield.

Ryan holds a BA from Lehigh University.



Marc Young

Partner
Co-Chief Investment Officer

Marc is a Partner and Co-Chief Investment Officer as well as a member of the Investment and Operating Committees. He has 31 years of professional experience. Prior to Torchlight, Marc worked at CWCcapital and AIG Global Investments.

Marc holds an MBA from Temple University and a BS from Pennsylvania State University.

Accommodations



Room Block

The Hermitage Hotel

231 6th Ave N, Nashville, TN 37219

+1-615-244-3121

www.thehermitagehotel.com

*Kindly request the Torchlight
Investors Room Block*

Other Nearby Hotels

Courtyard Nashville Downtown

170 4th Ave N, Nashville, TN 37219

+1-615-256-0900

[Link to Hotel](#)

Homewood Suites by Hilton

706 Church St, Nashville, TN 37203

+1-615-742-5550

[Link to Hotel](#)

DoubleTree by Hilton

315 4th Ave N, Nashville, TN 37219

+1-615-244-8200

[Link to Hotel](#)