



CRT Spring 2026 Member Meeting Agenda

The Yale Club of New York City

50 Vanderbilt Avenue, 18th Floor, Trumbull-Saybrook Rooms, New York, New York

Wednesday, May 6, 2026

CRT Board Meeting at Mutual of America (3:00pm – 4:30pm)

Member Reception and Dinner in the Saybrook Room at the Yale Club (6:00pm – 9:00pm)

Thursday, May 7, 2026

Breakfast (7:30am – 8:00am)

- Welcome and Introductions from Tony Brekke & Omar Sanders, Credit Roundtable Co-Chairs (8:05am – 8:15am)
- *Macro Musings: Monetary Policy and Credit Markets* (8:15am – 9:15am)

Speaker:

George Goncalves, Head of US Macro Strategy, MUFG Securities Americas Inc.

- *Potential Cracks in Private Credit* (9:20am – 10:20am)

Speakers:

Matt Mish, Head of Public and Private Credit Strategy, UBS
Clay Montgomery, Senior Credit Officer, Moody's
Additional Speaker Pending

Coffee Break (10:25am – 10:40am)

- *Live Member Polling* (10:45am – 11:00am)
- *Bondholder Co-Op Agreements: Recent Market Examples & Evolution Towards a Common Framework* (11:00am – 12:00pm)

Speakers:

Olga Peshko, Vice President and Corporate Counsel, PGIM Fixed Income Law

Jesse Brush, Partner, Akin

Jeff Dorst, Managing Director, Financial Restructuring & Capital Markets, Houlihan
Lokey

Iain Wood, Partner, Akin

Moderator: Gabe Crump, Director, Head of Credit Research, NISA Investment Advisors

- *Global Risk Landscape: Geopolitical Signals and Portfolio Implications* (12:00pm – 1:00pm)

Speakers:

General James “Spider” Marks, Academy Securities

Thomas Bouchard, Academy Securities

Peter Tchir, Macro Strategist, Academy Securities

Lunch (1:00pm – 2:00pm)

Meeting Concludes: 2:00pm