

Private Equity
International

CPE credits available

CFOs & COOs Forum New York All Access

June 9-10, 2021 | Eastern Time (ET)
Virtual, Available Anywhere

Redefining the private equity CFO & COO role

PEI

To learn more, visit:

privateequityinternational.com/cfo-coo/

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CFOs & COOs Virtual Forum 2021

Day One Agenda - June 9, 2021

9:15	Plenary session: PEI Welcome			
9:20	Plenary session: CFO All Access Community			
9:25- 10:05	Plenary session: Keynote Interview			
10:05- 11:05	Plenary session: 8th annual global CFO and COO benchmarking survey results			
11:05	Plenary session: A Special CFOs & COOs Forum Tribute			
11:15	Networking break			
11:30-12:20	Track A	Track B	Track C	Track D
	Virtual fundraising: best practices and lessons learned thus far	Achieving day-to-day operational efficiency	Strategies to harness and leverage data across the firm	Implementing ESG initiatives at the firm and portfolio level
12:20-12:50	Lunch – take a quick lunch break or join the networking Q&A sessions			
12:25-12:45	Networking Q&A - ask your pressing questions of the panelists, and your peers, to advance the discussions from the morning breakout sessions.			
	Track A	Track B	Track C	Track D
12:50- 1:40	Q&A for 11:30 fundraising panel	Q&A for 11:30 operational efficiency panel	Q&A for 11:30 data panel	Q&A for 11:30 ESG panel
	Track A	Track B	Track C	Track D
1:45-2:05	Valuation of underperforming companies as a result of COVID	Adapting to a remote environment while transitioning to a return to work strategy	Investor reporting: how the structure and metrics have changed	Tax updates: legislative, regulatory and reporting
	Track A	Track B	Track C	Track D
1:45-2:05	Networking Q&A - ask your pressing questions of the panelists, and your peers, to advance the discussions from the afternoon breakout sessions.			
	Q&A for 12:50 valuation panel	Q&A for 12:50 return to work panel	Q&A for 12:50 investor reporting panel	Q&A for 12:50 tax panel
2:10-3:00	Plenary session: Distinguishing what firms are doing differently in LP communications			
3:00	Networking break- take a quick break or join an interactive networking chat session			
3:05-3:25	Interactive networking chat sessions			
	Chat Topic 1 Expense allocations	Chat Topic 2 Crisis and risk management	Chat Topic 3 Compensation trends	
3:30	Spotlight interview			
4:15	End of day one			

CFOs & COOs Virtual Forum 2021

Day Two Agenda - June 10, 2021

9:15-10:15	CFOs and COOs Think Tank (invite only)	CCOs Think Tank (invite only)	Senior Finance Executive Think Tank (invite only)	
10:20	Plenary session: Opening remarks			
10:25-11:15	Plenary session: Is private equity making strides in addressing diversity?			
11:15	Networking break			
11:30-12:30	Roundtable A	Roundtable B	Roundtable C	Roundtable D
	Driving firm growth through human capital and talent management	Revisiting cybersecurity measures to protect the firm from emerging risks	SEC 2021 priorities and examination focus areas	Key considerations for advancing carried interest structures
12:30-1:00	Lunch—take a break on your own or grab a bite and join one of the interactive lunch & chat sessions			
12:35-12:55	Interactive lunch & chat sessions			
	Chat Topic 1 Subscription lines	Chat Topic 2 Outsourcing	Chat Topic 3 LPA amendments	
1:00-1:50	Plenary session: Looking for new acquisition opportunities in the current market			
1:55- 2:45	Track A	Track B	Track C	Track D
	What course will private equity regulation take in the next four years?	Secondary market update, pricing and valuation	Taking stock of succession planning at your firm	Technology innovation and implementation
2:50-3:10	Networking Q&A - ask your pressing questions of the panelists, and your peers, to advance the discussions from the afternoon breakout sessions.			
	Track A	Track B	Track C	Track D
	Q&A for 1:55 PE regulation panel	Q&A for 1:55 secondary market panel	Q&A for 1:55 succession planning panel	Q&A for 1:55 technology panel
3:10	End of conference			

Featured **keynote speaker**



Damien Dwin

Founder and Chief Executive Officer
Lafayette Square

Damien Dwin is an American businessman and investor who currently serves as the Chief Executive Officer of Lafayette Square. He founded Lafayette in November of 2020 as a model investment platform that deploys services-backed capital to local communities, independent businesses, and diverse investors. Lafayette Square is built for inclusion—here to change the financing paradigm and investing in an American economy worth believing in.

Hear from **leaders in private equity**

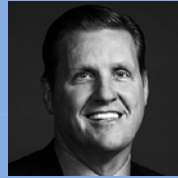
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Brandon Baudin
Chief Financial Officer
The Sterling Group



Tony Braddock
Chief Financial Officer
Stellex Capital
Management



Les Brown
Partner
HGGC



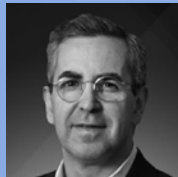
Eugenie M. Cesar-Fabian
Partner,
General Counsel & CCO
Palladium Equity Partners,
LLC



Steven DeCillis II
Partner &
Chief Financial Officer
AEA Investors LP



Omar Hassan
Principal,
Chief Financial Officer,
and CCO
Cloverlay Partners



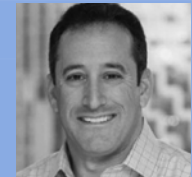
Robert S. Hull
Partner,
Global CFO and COO
L Catterton



Jun Isoda
Managing Director and
Chief Financial Officer
Siguler Guff



Michael Lebowitz
Director/Head of
Carried Interest and
Employee Investments
in Alternatives
BlackRock



Mark Lessing
Chief Financial Officer
& Managing Director
Insight Partners

Hear from **leaders in private equity**

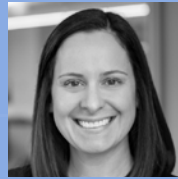
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Mark Levitt
Chief of Staff
Global Infrastructure
Partners



Thomas Mayrhofer
CFO and COO
EJF Capital, LLC



Stephanie Paine
Partner and Chief
Financial Officer
Pritzker Private Capital



Tina St. Pierre, CPA
Partner and Chief
Administrative Officer
Landmark Partners



Heramb Ramachandran
Chief Financial Officer
Sciens Capital
Management LLC



Giulianna Ruiz
Partner, General Counsel
and CCO
Trilantic Capital
Management L.P.



Kevin Slaton
Chief Financial Officer
and Chief
Compliance Officer
Insight Equity



Anna May L. Trala
Managing Director and
Chief Financial Officer
GTCR



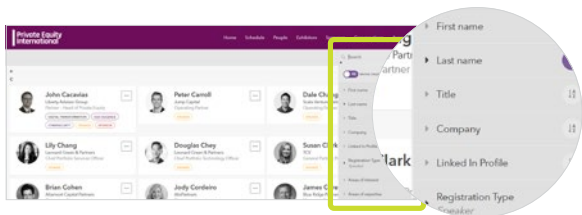
John Yantsulis
CFO & Partner
Searchlight
Capital Partners



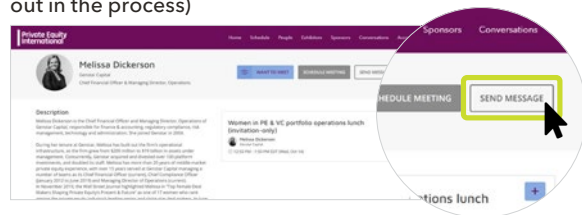
Arthur Zuckerman
Partner, CFO, CCO
and Head of Portfolio
Operations
Soundcore Capital
Partners, LLC

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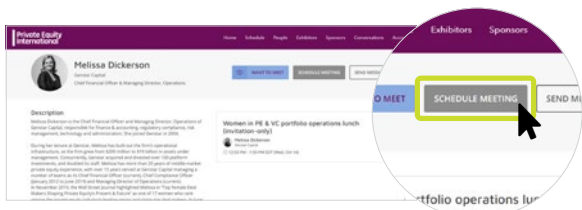
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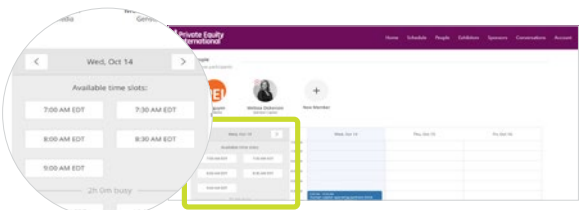
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Schedule a meeting on the platform



Arrange a meeting at a time that suits you with year-round access to the community list



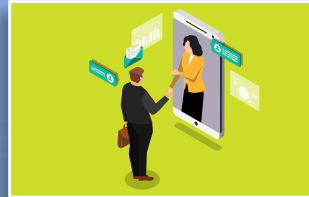
What is **CFO All Access**?

It is a **12-month membership service**

made up of a global community of CFOs, COOs, and senior finance executives built on a 20-year heritage on convening financial leaders in private equity. Network with your private equity and venture capital peers, exchange ideas and best practices, and participate in interactive discussions.



Connect year-round with CFOs, COOs, and senior finance executives. Participate in monthly Forums, deep dives, and discussions or take the conversation offline

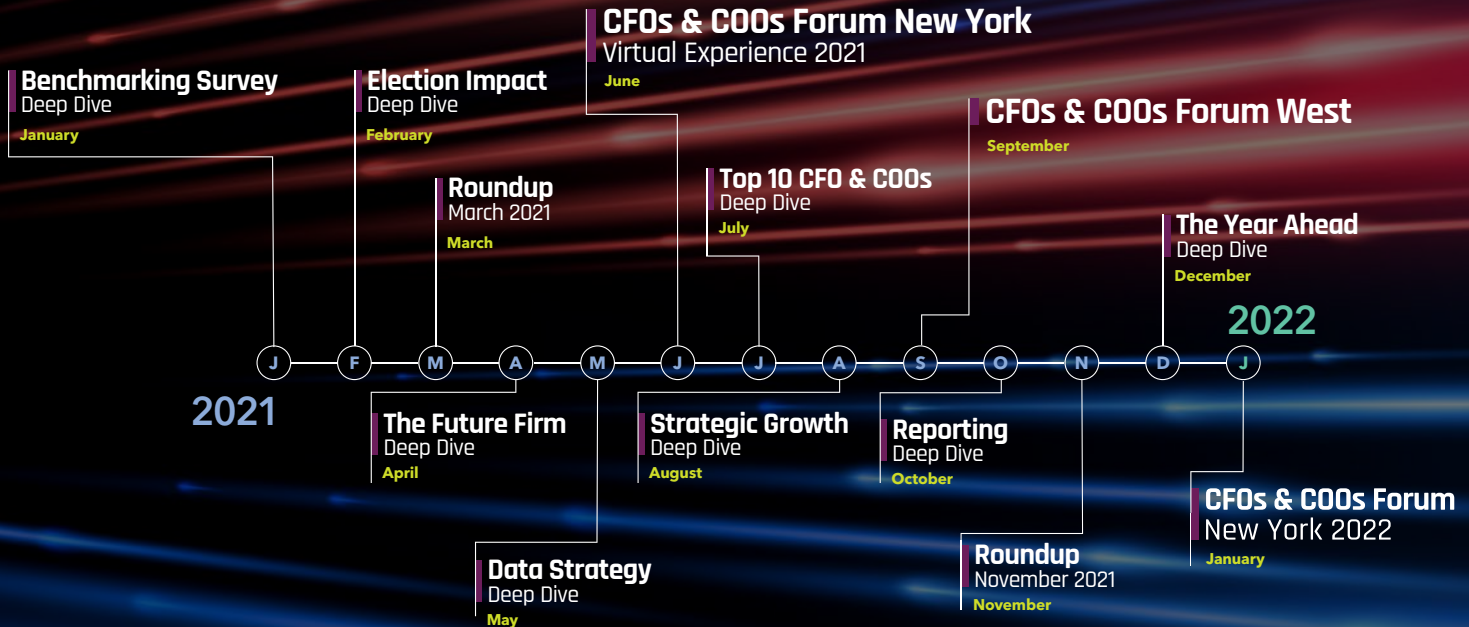


Watch sessions at any time; watch live or catch-up on demand throughout the year



Search our member directory and make new connections by sending private messages and scheduling meetings

What does a **year's membership** look like?



*Please note annual agenda is subject to change

Join our **growing community** of CFOs & COOs

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Member companies include

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- » Five Point Energy
- » Flexpoint Ford
- » Frontier Growth
- » Fundamental Advisors
- » Great Hill Partners
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- » New Leaf Venture Partners
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- » Orbimed Advisors
- » ORIX Capital Partners
- » Ottawa Avenue Private Capital
- » Palladin Consumer Retail Partners
- » Peak Rock Capital
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- » Portland Private Equity
- » Promus Holdings
- » Resource Land Holdings
- » Revelstoke Capital Partners
- » SFW Capital Partners
- » Stripes
- » SVB Capital
- » Tailwater Capital
- » The Cynosure Group
- » Thomas H. Lee Partners
- » VMG Partners

Learn more about CFO All Access memberships

The CFOs & COOs Forum is included in your CFO All Access membership. A membership includes 12 month access to community networking, attendance at all virtual events, one in-person event, plus all the monthly content delivered virtually on the platform.

This membership is for finance and operation professionals at private equity/venture capital firms. More information can be found at peievents.com/en/event/cfo-all-access

Single membership: \$2,995

Team membership: \$5,995

A team membership includes up to 5 members. Looking to include 5+ in your membership?

Contact Bes Selmani at Bes.s@peimedia.com or +1 212 796 8339

Interested in learning more and previewing the membership platform?

Our team will be happy to assist you.

Request a trial →

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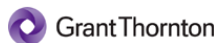
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