

**Private Equity
International**

**CFOs & COOs
Forum
New York 2020**

January 22-23
Grand Hyatt New York



"The best conference for finance professionals in the private equity industry."

Kristine O'Connor
MD and CFO
Franklin Park

17
years

of building a legacy as the annual meeting place for private equity CFOs and COOs

600+
attendees

from large, mid-sized, small and start-up firms influencing the discourse on private equity finance and operations

24
niche breakout topics

so you can customize your agenda at the event truly 'built by and for' private equity CFOs and COOs

Redefining the private equity CFO & COO role

Every January, private equity CFOs, COOs and senior finance and operations executives step away from their offices to meet with their peers in New York. The annual gathering—returning for its seventeenth year in 2020—is the preeminent platform for key decision makers to discuss the latest trends impacting their firms.

Transform the processes and practices within your firm

The dialogue throughout the closed-door think tanks, panels, breakouts and workshops feature key insights that consistently set the highest standard for private equity finance and operations professionals year after year.

Tap into tailored content for your role in private equity finance and operations

At the upcoming Forum, you can expect a comprehensive examination of topics like: how to manage LP/GP relations, performance calculations, data management, fundraising, co-investment, tax legislation, evolving technology, outsourcing, and implications of the looming 2020 US Presidential election.

**Exclusive
interviews
with
authoritative
keynotes**

Carl Thoma

Founder and Managing Partner
Thoma Bravo

Thoma is a recognized pioneer of the buy-and-build strategy that is the foundation of Thoma Bravo's strategy today. Before Thoma Bravo, he was a Co-Founder and Managing Director at Golder, Thoma, Cresse, Rauner and its predecessor funds since 1980.

He began his career at First Chicago Equity Group where he helped build one of the largest and most active private equity firms in the US.



Brien P. Smith

Managing Director
Neuberger Berman
Chief Operating Officer
**Neuberger Berman Private
Equity Division**

Smith is a member of the investment committees for Neuberger Berman's Private Investment Portfolios, Co-Investment and Private Debt programs, as well as the Operating Committee. Smith is also a member of the firm's Investment Risk and Operational Risk Committees.



William H. Hinman

Director, Division of
Corporation Finance
**U.S. Securities and Exchange
Commission**

Hinman was named Director of the Division of Corporation Finance in the SEC in May 2017. The Division seeks to ensure that investors are provided with material information in order to make informed investment decisions, provides interpretive assistance to companies with respect to SEC rules, and makes recommendations to the Commission regarding new and existing rules.



Featuring an insightful speaker faculty



Les Brown
Partner
HGGC



Kate de Mul
Director, Private
Markets Operations
KKR



Thomas P. Duffy
Partner & Chief
Financial Officer
The Vistria Group



Isaiah Massey
Managing Director
CFO
CAZ Investments



Thomas Mayrhofer
CFO and COO
EJF Capital



John McGuinness
CCO and Corporate
Counsel
StepStone Group



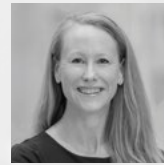
Gerry Esposito
Partner & CFO
Newbury Partners



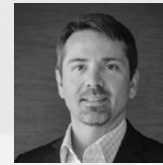
April Evans
Partner, CFO and
CCO
Monitor Clipper
Partners



Omar Hassan
Principal, CFO and
CCO
Cloverlay Partners



Nickie Norris
Senior Partner, COO
and CCO
New Heritage
Capital



Jonathan Nunnhofer
CFO
Trive Capital



Stephanie Paine
CFO
Pritzker Private
Capital



Pamela Hendrickson
COO & Vice
Chairman, Strategic
Initiatives
The Riverside
Company



Ruth E. Horowitz
Deputy CEO and
COO
IFC Asset
Management
Company



Amy Knapp
COO
Corsair Capital



Deneshea L. Phelps
Chief Financial &
Compliance Officer
Arlington Capital
Partners



John W. Polis
Chief Operating &
Technology Officer
Star Mountain
Capital



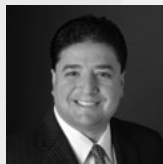
Abrielle Rosenthal
MD, CCO and Chief
HR Officer
TowerBrook Capital
Partners



Mark Levitt
COO
Global Infrastructure
Partners



Jeremiah J. Loeffler
COO - Credit
Crestline Investors



Shant Mardirossian
Partner, Chief
Operating Officer
Kohlberg &
Company



Sarah G. Roth
COO and CFO
Argosy Capital



Kevin Slaton
CFO and CCO
Insight Equity



Roy E. Sroka
CFO and CCO
Wynnchurch Capital

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Your inner circle of finance and operations executives in private equity

Connect with your community of peers facing the same challenges in private equity—away from the hectic day-to-day responsibilities at the office—to cultivate a go-to list of confidants, advisors and champions in the industry.

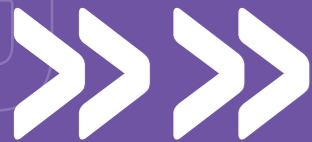
CFOs, COOs, SVPs, Directors and other senior finance and operations executives like you are already confirmed to attend from the following firms:

- » Advent International
- » Berkshire Partners
- » Bernhard Capital Partners
- » Brookfield
- » EnCap Investments
- » FFL Partners
- » Five Point Energy
- » Genstar Capital
- » GI Partners
- » Hellman & Friedman
- » HGGC
- » Kohlberg & Company
- » KSL Capital Partners
- » L Catterton
- » Linden Capital Partners
- » Lovell Minnick Partners
- » New Mountain Capital
- » NGP Energy Capital Management
- » Norwest Equity Partners
- » Patria Finance
- » Pearl Energy Investments
- » Pritzker Private Capital
- » Providence Equity Partners
- » Quantum Energy Partners
- » Rhone Group
- » The Riverside Company
- » TA Associates
- » Tailwater Capital
- » The Sterling Group
- » Thoma Bravo
- » TPG Capital
- » Trilantic Capital Management
- » Veritas Capital
- » Wynnchurch Capital
- » *and many more...*



A snapshot of the Forum's comprehensive agenda

To see the complete agenda with extended session descriptions, go online to: www.privateequityinternational.com/cfo-coo



Day 1 | January 22

- 7:45 **Registration - continental breakfast**
- 8:45 **Keynote interview**
- 9:30 **EY 7th annual global CFO and COO benchmarking survey results**
- 10:30 **Networking coffee break**
- 11:20 **Think tanks**
 - » Taking a deep dive on fundraising strategies (GPs only)
 - » Cash management strategies and the use of LOCs (GPs only)
 - » Attracting and retaining finance professionals (GPs only)
 - » CFO contribution to the strategic growth of the PE firm (GPs only)
 - » GP perspectives: ensuring third-party due diligence (Service providers only)
- 12:00 **Networking luncheon**
- 1:30 **Breakout series I**
 - » TRACK A: Staying ahead of investor reporting
 - » TRACK B: Revamping ESG policies
 - » TRACK C: PEI 300—views from the top
 - » TRACK D: COO role in building an investment process
 - » TRACK E: Technology Spotlight
- 2:25 **Breakout series II**
 - » TRACK A: Exploring opportunities in a maturing secondary market
 - » TRACK B: Embarking on diversity and inclusion across the spectrum
 - » TRACK C: Examining the macro tax environment
 - » TRACK D: COO toolkit for operational efficiency
 - » TRACK E: Technology Spotlight
- 3:15 **Networking coffee break**
- 3:45 **The 2020 rundown: an interactive analysis of hot topics in private equity**
- 4:35 **Keynote interview**
- 5:20 **Cocktail reception and end of day one**

Day 2 | January 23

- 7:45 **Think Tanks**
 - » CFOs and COOs think tank (invite only)
 - » CCOs think tank (invite only)
 - » Senior Finance Executive think tank (invite only)
- 8:15 **Continental breakfast**
- 9:15 **Keynote interview**
- 10:00 **LP perspectives: driving value for investors**
- 11:00 **Networking coffee break**
- 11:30 **Breakout series III**
 - » TRACK A: Reexamining data management strategy and implementation
 - » TRACK B: Global PE: operating issues and management implications
 - » TRACK C: The future firm—founder carry, retirement and succession planning
 - » TRACK D: Adopting a compliance culture across the firm
- 11:30 **Roundups**
 - » PEI 100 roundup
 - » Controller roundup
- 12:25 **Working group sessions**
 - » A: Technology integration of the front, middle and back office
 - » B: Valuation approach and guidelines
 - » C: Waterfall calculations and carried interest allocations
- 1:10 **Networking luncheon**
- 2:10 **How the CFO and COO functions are moving the firm forward**
- 3:00 **Election year impact on PE**
- 3:50 **Keynote fireside chat**
- 4:30 **End of conference**

Go online to see the complete agenda:
www.privateequityinternational.com/cfo-coo

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