



PERE

CFO/COO FORUM
NEW YORK 2019



Navigating operational complexity and scaling your organization

May 7-8 | Convene, 730 Third Ave, New York

To register go to: events.perenews.com/cfo-coo-forum



What keeps private equity real estate CFOs and COOs up at night?



Ever watchful investors

Institutional investors are seeking greater transparency into everything from performance data, fees and expenses, asset-based leverage, benchmarking and more. CFOs and their teams are at the forefront of addressing requests for customized financial reporting and must demonstrate their technology, processes and controls are operationally sound.



Regulation merry-go-round

The pace of global regulatory changes doesn't appear to be slowing down. From the impact of Brexit on selecting fund domiciles, implementing GDPR, SEC focus on cybersecurity to maintaining a robust compliance program, staying on top of these developments is a key imperative.



Keeping up with tech and data

Regardless of AUM, all fund managers are feeling pressure to collect more data and documentation from investors, property managers and clients as well as keeping that information safe. Forward-minded firms recognize that investing in technology, is not just a cost, but crucial to scale their organizations effectively.



Outsourcing gains traction

Real estate fund managers are quickly catching up to their private equity counterparts by leveraging outsourcing providers with more advanced technology platforms and robust infrastructures to alleviate operational burdens on their in-house teams. It's critical to map out essential deliverables to investors, deal partners and regulators, to determine what should be outsourced.



The X factor

Sourcing talent is no longer just about finding the best dealmakers and capital raisers. More and more, it is about finding exceptional tax, accounting, technology and risk compliance experts to support the investment team and address needs of key stakeholders.

Learn how to address these issues this May in New York

Agenda day one: May 7, 2019

8:00

Registration and breakfast

Women's networking breakfast (*invitation only*)

9:00

PEI welcome & chairman's introduction

9:10

Keynote CFOs and COOs panel | Scaling your organization for growth and managing operating complexity

Panelists:

- **Laurie "LG" Golub**, COO & Senior Managing Director, **Square Mile Capital Management**
- **Peter Harned**, Managing Director, **Morgan Stanley Real Assets**

10:00

Keynote fireside chat | Evolution of the private equity real estate industry

- **Sonny Kalsi**, Co-Founder, **GreenOak Real Estate**
- **Andrew Yoon**, COO, **GreenOak Real Estate**

Interviewer:

- **Evelyn Lee**, News Editor, **PERE**

10:45

Networking coffee break

11:05

Panel | Accessing alternative sources of capital

Moderator:

- **Cesar Estrada**, Sr. Managing Director - Global Head of Product Management for PE & Real Assets Fund Services, **State Street Corporation**

Panelists:

- **Tom Fortin**, COO, **icapital Network**
- **Cristiano Machado**, Managing Director & CFO Real Estate Funds, **Brookfield's Property Group**
- **Paul Quinlan**, Managing Director, **Real Estate, The Blackstone Group**

- 11:50 **Panel** | Operational considerations when bolting on a real estate credit strategy
- Panelists:*
- **Michael McGillis**, CFO, **Mack Real Estate Group**
 - **Carla Stoner**, CFO, **Harbor Group International**
- 12:30 **Networking lunch**
- 1:45 **Workshop A** | Evolution of fees, terms & expenses for real estate funds
- Panelist:*
- **Cyndy Silverthorn**, Managing Director- Portfolio Management & Investor Relations, **Crow Holdings Capital**
- Workshop B** | Tax structuring for non-US based investors
- Panelists:*
- **Daniel Abramoff**, Director of Tax, **PGIM Real Estate**
 - **Darren Glickman**, CFO, **Spectrum Group**
- 2:45 **Panel** | CFO's role in fund finance
- Panelists:*
- **Darren Berk**, CFO, **Dune Real Estate Partners**
 - **Yehuda Hecht**, Managing Director & CFO, **Madison International Realty**
- 3:30 **Networking coffee break**
- 3:45 **Panel** | Update on hot topics from NCREIF PREA Reporting Standards
- Moderator:*
- **Kyle Campbell**, Senior Reporter, **PERE**
- Panelists:*
- **John Caruso**, Managing Director, **Head of Finance – Americas, Nuveen Real Estate**
 - **Marybeth Kronenwetter**, Director, **Reporting Standards, NCREIF**
 - **Diane Wild**, Head of North America Investment Performance Reporting & Analysis, **LaSalle Investment Management, Inc.**

4:30

Panel | Qualified opportunity zones

Moderator:

- **Philip Marra**, National Audit Leader - US Building, **Construction & Real Estate Practice, US Real Estate Funds Leade, KPMG LLP**

Panelists:

- **Craig Bernstein**, Principal, **OPZ Bernstein**
- **Chad Briggs**, CFO, **Bridge Investment Group**
- **Thomas Mayrhofer**, CFO and Deputy COO, **EJF Capital**

5:15

Networking cocktail reception

Agenda day two: May 8, 2019

8:00

CFO & COO think tank (*invitation only*)

Registration and networking breakfast

9:05

Chairman's opening remarks

9:10

SEC update | Hot button issues and current exam focus impacting real estate managers

Interviewer:

- **Marshall Sprung**, Managing Director and Global Head of Compliance, **Blackstone**

Interviewee:

- **Ryan Hinson**, Regulatory Counsel, **US Securities and Exchange Commission**

9:45

Panel | Leveraging technology to more effectively manage data across the organization

Panelists:

- **Kathleen Hurley**, Director of IT, **Madison International Realty**
- **Scott Tavolocci**, Industry Principal, **Investment Management, Yardi**

10:30

Panel | Optimizing value of outsourced relationships

Panelists:

- **Jamie Christmas**, CFO, **Round Hill Capital**
- **Scott Kraemer**, Managing Director, **Vistra**
- **Peter Shepard**, CFO, **JCR Capital**

11:15

Networking break

11:30

Panel | Effectively managing LP co-investment, SMAs and other complex fund structures

Moderator:

- **Adam Handwerker**, Managing Director, **Hodes Weill & Associates**

Panelists:

- **Wayne Fitzgerald**, COO, **US Real Assets, BlackRock**
- **Robert Shaw**, Manager-Head of Real Estate Consulting, **AltaReturn**
- **Dev Subhash**, Partner, **StepStone Real Estate**

12:15

Panel | Attracting, managing and incentivizing staff

Moderator:

- **Lisa Fu**, Reporter, **PERE**

Panelists:

- **Ashia Derksen**, Senior Vice President, **Manager of Portfolio Accounting, Shorenstein Realty Services, L.P**
- **Alexander Labowitz**, General Counsel, **Cadre**

1:00

Networking luncheon & close of conference



Featured speakers



Daniel Abramoff
Director of Tax
PGIM Real Estate



Darren Berk
Chief Financial Officer
Dune Real Estate Partners



Craig Bernstein
Principal
OPZ Bernstein



Chad Briggs
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Wayne Fitzgerald
COO US Real Assets
BlackRock



Thomas Fortin
COO
iCapital Network



Lisa Fu
Reporter
PERE News

Interested in speaking?

Please contact **Arleen Buckley** at arleen.b@peimedia.com or +1 212 633 1454.

Featured speakers



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Chief Operating Officer &
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**Square Mile Capital
Management**



Adam Handwerker
Managing Director
Hodes Weill & Associates



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Ryan Hinson
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**US Securities and Exchange
Commission**



Zoe Hughes
CEO
NAREIM



Kathleen Hurley
Director of IT
Madison International Realty



Scott Kraemer
Managing Director
Alternative Investments
Vistra



Marybeth Kronenwetter
Director Reporting
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Evelyn Lee
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Featured speakers



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Scott Tavolocci

Industry Principal,
Investment Management
Yardi



Diane Wild,

Head of North America
Investment Performance
Reporting & Analysis
**LaSalle Investment
Management, Inc.**

Keynote fireside chat

Sonny Kalsi

Co-Founder
GreenOak Real Estate



Recognized as a leader in the private equity real estate industry for 28 years and co-founder of GreenOak in 2010, Sonny will share his insights on how the current wave of real estate M&A reflects the evolution of the private equity real estate industry.

He will be joined onstage by his Chief Operating Officer, **Andrew Yoon** to discuss the strategic role of the COO throughout the M&A process from due diligence through to business integration.



Keynote Interview with the SEC



Ryan Hinson, securities compliance examiner at the **Securities and Exchange Commission**, has agreed to be interviewed onstage by his former colleague **Marshall Sprung**, who is Blackstone's global head of compliance,



Our audience at the annual conference will have a special opportunity to anonymously ask questions on the SEC's released exam priorities for 2019 and the continued focus on cybersecurity, disclosure of fees and expenses, conflicts of interest and utilization of subscription credit facilities.

Sponsors



Registration



Online

events.perenews.com/cfo-coo-forum



Email

regny@peimedia.com



Phone

+1 212 633 1073

Pricing

Registration type	Price
General delegate <i>Defined as private equity real estate, REITs and fund of funds managers.</i>	\$2,995
Service providers <i>Defined as any organization which provides advisory services and technology solutions to private fund managers.</i>	\$3,495
Qualified institutional investor*	Complimentary

*subject to the review and approval of the event organizer

Up to 12 CPE credits available

Program level:

Overview

Delivery method:

Group live

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No prerequisites or advance preparation needed.