<u>**CFOs & COOs Europe 2020**</u>

3-4 June London

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EXHIBITORS

AZTEC GROUP CRESTBRIDGE

<u>Advisory Board:</u>
Vijay Bharadia, CFO & COO, **ICG**
Marc Dumbell, Chief Financial & Operating Officer, **Campbell Lutyens**
Erica Herberg, CFO, Investment Solutions, **Carlyle Group**
Anita Huynh, COO, **Macquarie Infrastructure & Real Assets**
Jamie Lyon, European CFO & COO, **LaSalle Investment Management**
Neel Metha, CFO, **DWS Private Equity**

<u>Other confirmed speakers:</u>
Niyamat Faizal, CFO, **DWS Infrastructure**
Lindsey Ord, Chief Financial & Risk Officer, **Climate Fund Managers**
Debojit Mukherjee, Chief Operating Officer, **Agilitas Private Equity**
Nisha Raghavan, Managing Director Chief Finance Officer, **EQT Partners**
Apwinder Foster, Chief Operating Officer, **DRC Capital**
Maqbool Mohamed, Managing Director & CFO European Assets, **Castlelake**
Leo Scanavino, CFO, **RJD Partners**
Katja Baur, CFO, **Montana Capital Partners**
Anne Sheedy, CFO, **53° Capital**
Robin Bailey, Partner & Chief Operating Officer, **Pantheon**
Christopher Parmo, COO, **Verdane**
Marie Joyce, CFO, **NTR**
Steve Darrington, CFO, **Phoenix Equity Partners**

Day 1

08.00 Registration & networking

08.40 Welcome and introduction by chair

09.00 Opening keynote
Preparing for the next major shift: how to adapt to a constantly evolving role

09.30 Panel session
Growing your business in a time of increased complexity

- Achieving economies of scale across finance, operations, HR and compliance
- As firms grow, which functions can gain improved efficiency via outsourcing?
- Internal business dynamics: the role of the CFO/COO in managing international expansion
- Organic growth versus M&A

10.10 Panel session
Digital transformation and the technology revolution

- RPA, automation and the future of financial asset management
- Must-have versus nice-to-have, which technological innovations are worth the investment to give your firm the competitive edge?
- Speeding up the pace of innovation: third party collaborations or in-house talent expansion?
- Identifying the areas most susceptible to disruption: front, middle or back office activities?

10.50 Coffee & networking

11.30 Streamed sessions

STREAM A: Finance	**STREAM B: Operations**	**STREAM C: Tax & regulation**	**STREAM D: Technology**
Panel: The evolving role of the CFO in private funds	Panel: Driving your private fund business forward through successful operations	Panel: Combating regulatory challenges on the horizon	Panel: Integrating tech successfully from front to back office
Audience roundtables: • Role of the CFO in fundraising • Hedging interest rates and currency risks • Integrating a new strategy into an existing platform	Audience roundtables: • Operational due diligence of your business • Attracting & retaining talent & the value of team diversity • Succession planning	Audience roundtables: • AIFMD & reverse solicitation: how to ensure compliance • BEPS & its impact on funds • SEC registration & the challenges of GDPR	Audience roundtables: • Reporting requirements and how technology can streamline the process • Cybersecurity • Effective data management

13.00 Lunch & networking

14.00 Streamed sessions – panels & roundtable discussions

STREAM A: Infrastructure	**STREAM B: Private Debt**	**STREAM C: Private Equity**	**STREAM D: Real Estate**
Panel: Surviving & thriving in a constantly evolving & increasingly regulatory-driven infrastructure market	Panel: How has the CFO/COO role changed as private debt moves into a post-established era?	Panel: Preparing for future operational & finance challenges within your private equity business	Panel: Embracing the increasingly strategic CFO/COO role in real estate
• Defining the boundaries of infrastructure • Trends in asset pricing • Innovative structures to maximise returns	• Managing liquidity • Update on private debt fund structures • How operational due diligence for debt funds differs from other asset classes	• Credit lines and use of debt for PE funds • Differentiating your fund from the competition • Value creation	• Impact of UK capital gains tax on pricing • Lessons from the listed market • Accessing alternative sources of capital

15.30 Coffee & networking

16.00 Streamed sessions – roundtable discussions

STREAM A: Infrastructure	**STREAM B: Private Debt**	**STREAM C: Private Equity**	**STREAM D: Real Estate**
Development risk	Assessing valuations of debt	The role of the CFO/COO in the exit strategy	Managing end of life funds
Strategies for finding undervalued assets in the current market	Default risk: how to limit exposure	Implementing a successful portfolio review	Managing fund level debt finance

17.00 Keynote interview

17.30 Close of day one followed by cocktail reception

Day 2

08:00 Invite-only CFO & COO breakfast

08.00 Registration & networking

09.10 Welcome from chair

09.15 Keynote
Global tax and regulatory update

09.45 Panel session
Outsourcing versus in-house capabilities

- Integrating outsourced functions with in-house resources
- What criteria should be used when choosing an outsourcing provider?
- Building from within: recruiting and retaining the right technology leaders
- Balancing cost and efficiency

10.30 Coffee & networking

11.00 Panel session
Update on structuring, strategies and jurisdictions

- How do strategies and choice of jurisdiction differ across the alternative asset classes?
- Economic substance requirements
- Managing a multijurisdictional business – challenges that CFOs & COOs face

11.45 Presentation
Developing an ESG strategy: how to measure and demonstrate value

- What data is used to measure ESG performance in investment – whether portfolio companies, infrastructure projects or otherwise?
- Does ESG data need to be tailored? Or is there a generic framework to satisfy all clients?
- Environmental, societal & governmental – which aspect of ESG is most in-focus currently? And how do the requirements (reporting, data etc.) compare?
- Top tips & takeaways for building out a successful ESG strategy: skills & software required, integration with other teams, avoiding greenwashing & more

12.15 Closing interview
What investors want

- What can CFOs & COOs do to ensure their investors have the highest quality client experience possible
- Information, transparency, data & more - what investors expect from their managers and how this varies across asset classes
- Fees, expenses, ESG… what do investors prioritise in their reports and communications received from their managers?
- Latest in fund terms: what to negotiate, latest in preferred terms

13.00 Lunch & close of conference