

CFOs & COOs Europe 2020

3-4 June London

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Anita Huynh, COO, **Macquarie Infrastructure & Real Assets**

Jamie Lyon, European CFO & COO, **LaSalle Investment Management**

Neel Metha, CFO, **DWS Private Equity**

Other confirmed speakers:

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**

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**

Andrew Haywood, CFO, **Park Square Capital**

Andrew Aitken, Global COO & CFO, **Cross Ocean Partners**

Dean Horton, COO, **African Infrastructure Investment Managers**

Nick Moore, Founder & Executive Director, **Lionpoint Group**

Richard Day, COO, **Pygmalion Capital Advisers**

Hiren Patel, MD, Head of Finance in Debt Investments & Special Situations, **LaSalle Investment Management**

Nigel Mills, Director, **MM&K**

Stuart James, Principal, **MM&K**

Luke Venables, COO, **ARA Venn**

Jamie Lucas, COO, **EQT Credit**

Steve McGoohan, EMEA COO, **BlackRock Alternatives**

Martina Sanow, Deputy COO, **Hg Capital**

Raxita Kapashi, CFO, **Dawn Capital**

David Weeks, Co-Chair, **Association of Member Nominated Trustees**

Simon Hirtzel, General Partner & COO, **Kreos Capital**

Robert Gaglione, COO, **Dirichlet Principal Partners**

Ersilia Molnar, COO, **Muzinich & Co.**

Richard Urban, Independent Executive Director, **Rivington Pike**

Karine Litou, Global Head of Product & Solutions, Private Capital, **BNP Paribas Securities Services**

Al Naqvi, CEO & Researcher, **American Institute of Artificial Intelligence**

Stephane Janin, Head of Global Regulatory Development, **AXA Investment Managers**

Sanjay Jawa, Operating Partner & CFO, **Root Capital**

Day 1

08.00 Registration & networking

08.40 Welcome and introduction by chair

09.00 Opening keynote

Staying on Top of the Seismic Shift: A COO/CFO's Concise Guide to Artificial Intelligence's Impact on Asset/Fund Management

No longer merely a tool in the tech toolkit, AI is now seen as the core around which modern companies are built. As Asset/Fund Management industry is shaken by the powerful dynamics unleashed by AI, in this executive session learn how to rapidly assess your firm's critical strategic needs in AI. Determine how to evaluate the competitive risk of failure to automate. Develop insights into how to protect your firm from the onslaught of a rival, more intelligent and efficient, system. Determine the best way to set the organizational direction to embrace the power of AI without losing focus.

Prof. Al Naqvi, CEO & Researcher, **American Institute of Artificial Intelligence**

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

Erica Herberg, CFO, Investment Solutions, **Carlyle Group**

Robin Bailey, COO, **Pantheon**

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?

Moderator: Nick Moore, Founder & Executive Director, **Lionpoint Group**

Marc Dumbell, Chief Financial & Operating Officer, **Campbell Lutyens**

10.50

Coffee & networking

STREAM A: Finance	STREAM B: Operations	STREAM C: Tax & regulation	STREAM D: Technology
<p>Panel: The evolving role of the CFO in private funds Katja Baur, CFO, Montana Capital Partners Marie Joyce, CFO, NTR plc Lindsey Ord, CFRO, Climate Fund Managers</p>	<p>Panel: Driving your private fund business forward through successful operations Moderator: Nigel Mills, Director, MM&K Debojit Mukherjee, COO, Agilitas Private Equity Martina Sanow, Deputy COO, Hg Capital Raxita Kapashi, CFO, Dawn Capital Anita Huynh, COO, Macquarie Infrastructure & Real Assets</p>	<p>Panel: Combating regulatory challenges on the horizon Simon Hirtzel, General Partner & COO, Kreos Capital Stephane Janin, Head of Global Regulatory Development, AXA Investment Managers</p>	<p>Panel: Integrating tech successfully from front to back office</p>
<p>Audience roundtables:</p> <ul style="list-style-type: none"> • Role of the CFO in fundraising • Hedging interest rates and currency risks • Integrating a new strategy into an existing platform • Succession planning for the modern-day CFO 	<p>Audience roundtables:</p> <ul style="list-style-type: none"> • Operational due diligence of your business • Attracting & retaining talent & the value of team diversity - <i>Facilitated by</i> Stuart James, Principal, MM&K • Implementing a successful culture & ensuring employee wellbeing • Succession planning 	<p>Audience roundtables:</p> <ul style="list-style-type: none"> • AIFMD & reverse solicitation: how to ensure compliance • BEPS & its impact on funds • SEC registration & compliance for European funds • Data protection & GDPR in a post-Brexit world 	<p>Audience roundtables:</p> <ul style="list-style-type: none"> • Reporting requirements and how technology can streamline the process • Cybersecurity • Effective data management • Integrating technology with business culture

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 Niyamat Fazal, CFO, DWS Infrastructure Dean Horton, COO, African Infrastructure Investment Managers	Panel: How has the CFO/COO role changed as private debt moves into a post-established era? Andrew Haywood, CFO, Park Square Capital Hiren Patel, MD, Head of Finance in Debt Investments & Special Situations, LaSalle Investment Management	Panel: Preparing for future operational & finance challenges within your private equity business Christopher Parmo, COO, Verdane Steve Darrington, CFO, Phoenix Equity Partners	Panel: Embracing the increasingly strategic CFO/COO role in real estate Nisha Raghavan, CFO, EQT Partners Apwinder Foster, COO, DRC Capital Maqbool Mohamed, CFO, Castlelake Richard Day, COO, Pygmalion Capital Advisers
Audience roundtables: <ul style="list-style-type: none"> • Innovative structures to maximise returns • Development risk 	Audience roundtables: <ul style="list-style-type: none"> • Managing liquidity • Update on private debt fund structures • How operational due diligence for debt funds differs • Difficulties & challenges with debt data 	Audience roundtables: <ul style="list-style-type: none"> • Credit lines and use of debt for PE funds • The role of finance & operations in value creation • The role of the CFO/COO in the exit strategy • Implementing a successful portfolio review 	Audience roundtables: <ul style="list-style-type: none"> • Accessing alternative sources of capital • Managing end of life funds • Managing fund level debt finance

15.30

Coffee & networking

16.00

Streamed sessions – panels & roundtable discussions

STREAM A: Infrastructure	STREAM B: Private Debt	STREAM C: Private Equity	STREAM D: Real Estate
Panel: CFOs & COOs view on the infrastructure investment market <ul style="list-style-type: none"> • Defining the boundaries of infrastructure • Trends in asset pricing 	Panel: CFOs & COOs views on the private debt investment market <ul style="list-style-type: none"> • How the credit cycle is impacting private debt fundraising & structuring 	Panel: CFOs & COOs views on the private equity investment market <ul style="list-style-type: none"> • PE fundraising in 2020 & the modern CFOs role in this 	Panel: CFOs & COOs views on the real estate investment market <ul style="list-style-type: none"> • Impact of UK capital gains tax on pricing

<ul style="list-style-type: none"> • Strategies for finding undervalued assets in the current market • Emerging markets infra: CFOs views on the challenges & opportunities 	<ul style="list-style-type: none"> • Assessing valuations of debt • Standing out from the competition in a packed middle market 	<ul style="list-style-type: none"> • Importance of ESG to investors • Impacts of retail investors entering the PE market • Is reputational risk a concern for the global PE industry? <p>Sanjay Jawa, Operating Partner & CFO, Root Capital</p>	<ul style="list-style-type: none"> • Lessons from the listed market • The rise of real estate debt funds & direct lending • Finding opportunities in the middle market <p>Luke Venables, COO, ARA Venn</p>
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- 17.00 Closing panel session: What investors want
- What can CFOs, COOs & their teams 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
- David Weeks,** Co-Chair, **Association of Member Nominated Trustees**

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

Moderator: Karine Litou, Global Head of Product & Solutions, Private Capital, **BNP Paribas Securities Services**
Leo Scanavino, CFO, **RJD Partners**
Neel Mehta, CFO, **DWS Private Equity**

- 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 finance & operations face
- 11.45 Fireside chat
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
- Ersilia Molnar, COO - Europe, Muzinich & Co.**
- 12.15 Closing keynote interview
- 13.00 Lunch & close of conference