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**Private Equity
International**

CFOs & COOs Spring Roundup

March 25 | Virtual event

PEI

www.peievents.com/en/event/cfos-coos-spring-roundup

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The CFOs & COOs Spring Roundup is now part of CFO All Access membership

What is CFO All Access?

It's Private Equity International's newest service dedicated to connecting CFO and COOs with the latest strategies, insights and benchmarks direct from your peers and industry leaders.



Successfully navigate
2021 with access to the
CFO and COO community
year-round

Calendar ➞



Ask those burning
questions directly to
your peers in one to one
meetings or focused
discussion groups

Networking ➞



Receive essential industry
updates on March 25
through six discussion
topics in an interactive
roundtable format

Agenda ➞

Engage in six solution-driven discussions

An interactive half-day Roundup, attendees will rotate virtual tables to engage in a different hot topic every 30 minutes

10:15	10:45	11:15	11:45	12:15	12:45	1:15	1:45
Rotation 1	Rotation 2	Networking break	Rotation 3	Rotation 4	Networking lunch break	Rotation 5	Rotation 6

ROUNDTABLE 1

Approaching valuation in the year ahead

- What does valuation look like globally and how to approach it in the months ahead
- Are companies better positioned as a result of the pandemic: impacts and lessons learned?
- Making a call on what valuation teams should be doing differently
- Assessing changes in transparency demands and requirements to implement enhanced initiatives
- How have you been dealing with valuation with the auditors?
- New administration impact on valuation

FACILITATORS

Sylvia Cho, Principal, **Transaction Services**, **Grant Thornton LLP**
Béla Schwartz, CFO, **The Riverside Company**

ROUNDTABLE 2

Operational efficiency—evaluating internal and external resources

- Ascertaining the CFO role in improving operational efficiencies within the firm
- Identifying where to locate efficiencies that won't add a burden to the business
- Maintaining team culture within the PE firm to enhance morale, engagement, productivity and efficiency
- Best practices for efficiently managing firm planning, fundraising, investor relations, firm planning, analytics, compliance and HR
- Challenges faced by CFOs and COOs in monitoring and controlling legal spend
- How technology can enhance performance and reporting mechanisms with minimum disruption to existing practices
- Balancing internal resources with outsourced functions

FACILITATORS

Colin MacLeod, VP of Strategy and Operations, **Apperio**
Sanjay Sanghoo, COO, CFO and CCO, **Delos Capital**

Engage in six solution-driven discussions

ROUNDTABLE 3

Defining data management at your firm

- How do you define data management at your firm?
- What methods have you implemented for collecting and analyzing portfolio company data?
- Should cybersecurity accountability/responsibility rest with the CFO?
- Mitigating the risks associated with implementing and adopting new technology
- Calculating performance and communicating it investors
- Are your LPs making demands for real-time data?
- Does fundraising change your data and data management requirements? Are you producing different types of analytics?

FACILITATOR

Drake Paulson, Senior Director, **eVestment Private Markets**

ROUNDTABLE 4

Navigating fees and expenses in an evolving environment

- Providing more transparency around fees and expenses management to LPs
- Best and/or common practices for management fees, partnership agreement terms, and handling extensions
- Aligning the front and back office on how to promote transparency in reporting fees and expenses
- How to navigate moving your firm into a more transparent fees and expenses conversation
- Compliance check: reexamining your firm's process for allocating fees
- SEC findings on inappropriately managing fees

FACILITATORS

Anne Anquillare, CFA, Chief Executive Officer and President, **PEF Services LLC**

Kimberly D. Futrell, Chief Financial Officer, **Pharos Capital Group, LLC**

Engage in six solution-driven discussions

ROUNDTABLE 5

Virtual human capital management—fostering a connected firm

- GP incentives and capital structure: having direct access to carried interest compensation, co-investments or GP commitment
- Connecting the finance, HR and operations teams in a virtual environment
- Fostering transparency and mitigating the risks associated with incentive plan management
- Succession planning: retaining existing management while preparing for new leadership
- How do you attract new talent, and retain and motivate your existing human capital?

FACILITATORS

Paul Cunningham, Chief Financial Officer, **Helios Investment Partners**

Tom Pittman, Managing Director, Chief Marketing Officer, **EWM Global**

ROUNDTABLE 6

Advancing ESG initiatives and priorities within the firm

- Examining how ESG is evolving in private equity and taking shape in your firm
- Establishing a formal approach to putting in place and documenting ESG policy
- Conducting an analysis on the data and what you need to measure
- Utilizing private vs. public data: where can firms go to source data?
- Tagging assets and providing metrics to LPs
- Analyzing ESG from an investor relations perspective
- Compliance and ESG—what should be on your radar?

FACILITATORS

James Jefski, Managing Director, **State Street Global Services**

2:15 **End of Roundup**

CFOs & COOs community testimonials



A must attend conference for me. Plan to expand to other members of the Finance team.

Shant Mardirossian
Partner and Chief Operation Officer
Kohlberg & Company



Really wonderful, insightful, and targeted.

Amy Hauke
Director-Private Equity
BMO Private Wealth



The Forum is consistently the best conference for finance professionals in the private equity industry! Meaningful content, knowledgeable speakers and ample networking opportunities!

Kristine O'Connor
Managing Director and Chief Financial Officer
Franklin Park



The event is great for networking and discussing and discovering best practices for PE CFOs.

Jesse M Burwell
Chief Financial Officer
RLJ Equity Partners LLC



This is the premier event for CFOs and COOs in private equity. I love the ability to see/hear peers and industry leaders in one event.

Joseph Riley
Managing Partner and Chief Administrative Officer
Psilos Group



Excellent content and networking opportunities.

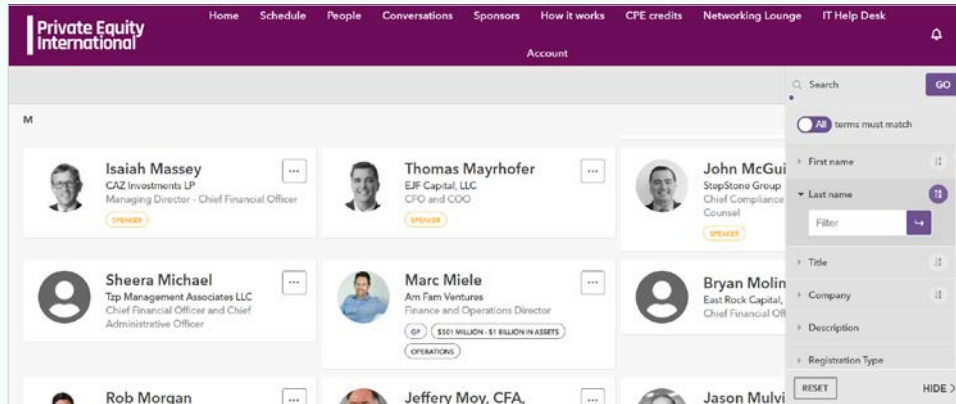
Sean Connor
Chief Financial Officer
Whitehorse Liquidity Partners

Current members already taking part in CFO All Access include:

- » ABRY Partners
- » Advent International
- » Avista Capital Partners
- » BlackRock
- » Center Rock Capital Partners
- » The Cynosure Group
- » Five Point Energy
- » Flexpoint Ford
- » Frontier Growth
- » Fundamental Advisors LP
- » Greenspring Associates
- » Greyhound Capital Europe
- » HCI Equity Partners
- » Investindustrial
- » JMI Equity
- » Kohlberg & Company
- » Landmark Partners
- » LLR Partners
- » MassMutual
- » Melody Investment Advisors
- » MiddleGround Capital
- » MidOcean Partners
- » New Harbor Capital
- » New Leaf Venture Partners
- » Onex
- » OrbiMed
- » ORIX Capital Partners
- » Ottawa Avenue Private Capital
- » Palladin Consumer Retail Partners LLC
- » Peak Rock Capital
- » Portland Private Equity
- » Resource Land Holdings
- » Revelstoke Capital Partners
- » SFW Capital Partners
- » Stripes Group
- » Tailwater Capital
- » Thomas H. Lee Partners
- » VMG Partners

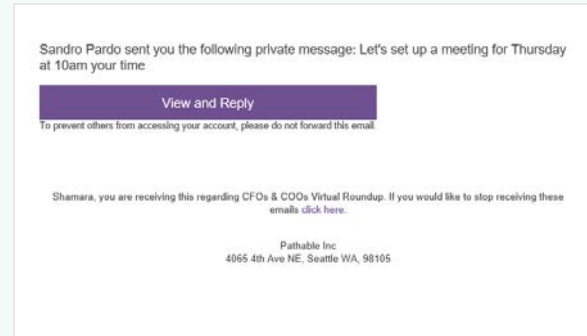
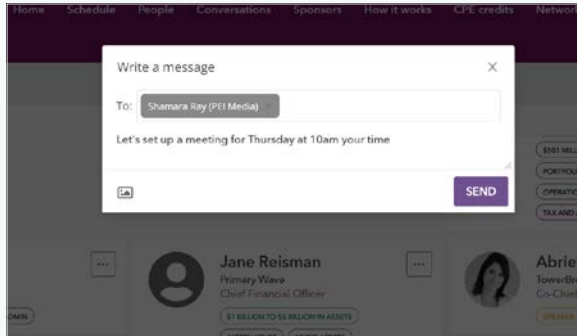
Unlock your networking opportunities with our virtual platform

Search other members by name, title, or AUM



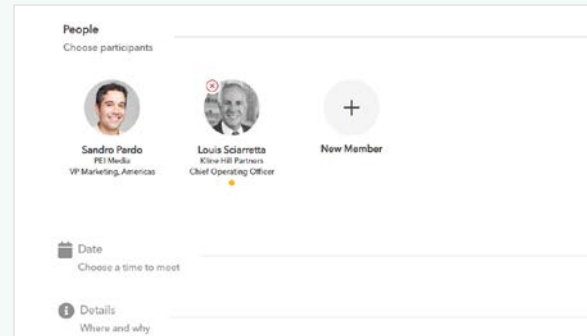
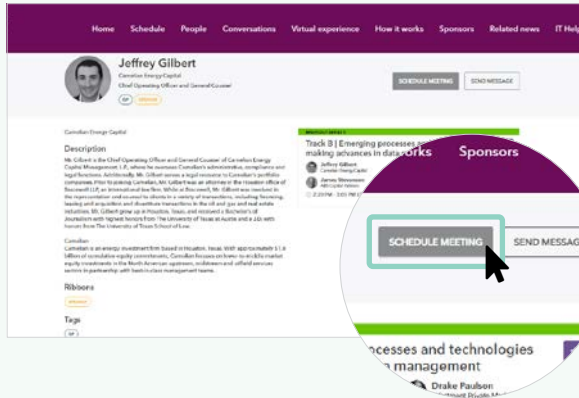
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Send a message directly to the recipient's inbox



Unlock your networking opportunities with our virtual platform

Schedule a meeting



The year ahead:



*Please note annual agenda is subject to change