CFOs and COOs Europe Forum 2021
Deliver strategic growth within private funds
16-17 November, London

Day one: 16 November

08:40
Chairperson's Welcome Address for the PEI Private Fund CFO/COO forum

08:45
Opening Panel Discussion: Assessing the shift in priorities for private fund CFOs and COOs

- How have the pandemic's multi-faceted repercussions forced a re-think for private fund CFOs and COOs?
- What has it meant for them and their team's strategic position within the business?
- Which areas are requiring the most attention and spend at present?

Hina Ahmad, COO, Capital Dynamics

09:25
Keynote interview: Diversity and inclusion progression in private markets

- How has diverse hiring developed over recent years?
- Which D&I initiatives have proven most successful?
- Influencing diversity and inclusion culture in third parties and portfolios

09:50
Panel Discussion: A key year for ESG development in private markets – SFDR, subscription credit lines and more

- How have fund managers coped with the EU's Sustainable Finance Disclosure Regulation (SFDR) so far?
- How does it compare to AIFMD?
- Choosing the right ESG metrics for your subscription credit line
- Future impacts on costs, technology, processes and reporting

Steve Darrington, CFO, **Phoenix Equity Partners**
Marie Joyce, CFO, **NTR**

10:30
Interview: to be confirmed

10:55
Networking Break

11:30
Panel Discussion: Investment outlook – how are the private markets shaping up?
- PE, private debt, infra and real estate – where do the opportunities lie?
- How have firms overcome the challenges of remote fundraising and client interaction?
- Secondaries, SPACs, NAV lending and fund finance – how is the significant growth and change in these areas transforming the market?
- ESG prioritisation – what factors are funds targeting and what's most important to investors?

12:15
Panel Discussion: Technology and automation in private markets – 2021 and beyond
- Data management, SaaS, connectivity between systems – what are the key foundations for technological development to prosper?
- Which processes and business areas are seeing the fastest acceleration in technological development at present?
- Top tips when it comes to new systems and efficiency savings
- Are the private markets catching up with the public side when it comes to automating to scale?

Lindsey Ord, Chief Finance & Risk Officer, **Climate Fund Managers**

13:00
The eternally evolving debate: Out-sourcing vs in-house considerations
- Key components of the decision-making process
- The merits for each whilst taking into consideration the latest swathe of regulation
- Impact that the pandemic and shift towards remote/hybrid working has had on these decisions
- Fund administration – continued outsourcing or growing internal capabilities?
- Managing costs in this area amidst tightening margins and intensified fee pressures

Leo Scanavino, Finance Director, **RJD Partners**
Maqbool Mohamed, CFO, **Clarion Gramercy**

13:40
Lunch and networking break

14:45
Functional breakouts

Stream A – Finance and Regulation	Stream B - Operations and Technology
14:45 **Mapping out your legal framework as the regulatory screws tighten on private assets** • SFDR, EU Taxonomy and other regulatory hurdles causing the biggest headaches at present • Ensuring that you have a legal and regulatory set-up that works for your business • Best practice when working with legal third parties and harnessing their expertise • How finance functions are coping with increasing legal and regulatory spend	**14:45** **Becoming a data-driven private fund manager** How are the lines between infrastructure, real estate and other asset classes continuing to blur? • Finding a data management solution that works to scale for your firm • Connectivity between systems – why this holds the key to data aggregation and protecting against data duplication and inaccuracy across the business • Regulatory impacts on data management – GDPR, reporting and more • Developing your data analytics capabilities to provide tangible business intelligence • Why ESG and investor demands are transforming the data landscape **Susan Wilkins**, CFO, **Actis** **Lisa Weaver-Lambert**, Data and Digital Operating Partner
15:30 **Traditional finance priorities for 2021 and beyond** • Latest tax disclosure requirements • Best preparation for continued intensification of fee and expense pressures • Putting ESG sub lines into practice • What to expect in the carry stakes over the coming months	**15:30** **Combating increasingly sophisticated cyber threats** • Why are we seeing a significant increase in the number of ransomware attacks in the market? • Best practice for protecting yourselves and your portfolio companies • Managing risk around third parties • Ensuring you have a cyber-resilient workforce and culture in place

16:15
Afternoon Networking Break

16:40
Panel Discussion: Culture, human capital and talent strategy in private assets

- Assessing how leadership attitudes towards business culture have changed
- Striking a balancing act between flexible working, employee satisfaction and high performance
- The role of technology and data analytics in talent engagement and retainment
- Remuneration, rewards and other considerations

Martina Sanow, Partner, **Hg**
Marc Dumbell, CFO and COO, **Campbell Lutyens**

17:20
Off the record - audience roundtable discussions over drinks:

- **Managing FX at the fund level**
- **Challenges around bank clients – Basel and more**
- **US tax considerations – the SEC and the Biden administration**
- **What will the future of private asset fundraising look like?**
- **Working out your artificial intelligence roadmap**
- **Carry expectations in the post-Covid era**
- **Weighing up the benefits of waterfall automation**
- **How are valuation methods and processes changing across private assets?**

18:00
Networking drinks reception

Day two: 17 November

08:45
Private think tanks – asset classes

CFOs and COOs in private equity	**CFOs and COOs in private debt**	**CFOS and COOs in infrastructure**	**CFOs and COOs in real estate**

Private Equity International

CFOs & COOs Europe 2021

09:45
Opening interview: How python modelling is set to improve investment decisions, private fund management and investor relations

10:15
Panel Discussion: Assessing the future of Europe in a post-Brexit landscape

- What will the alternative fund landscape look like in Europe in the upcoming years?
- Could Dublin or anywhere else become a new offshore centre? And what would that mean for fund structuring and investment decision-making?
- Continuing post-Brexit operational challenges for private funds
- Are private markets in Europe becoming increasingly democratized? What does this mean for fund managers?

Moderator: Richard Urban, Independent Non-Executive Director, **Rivington Pike**
Simon Hirtzel, COO, **IQ Capital**

11:00
Networking Break

11:30
In-Focus Fireside Chat: The rise of ESG sub lines

- Do subscription credit facilities linked to ESG metrics or green bonds represent the 'holy grail' for successful ESG integration in private funds?
- Why sub lines mean more transparency for investors
- How do they manifest across the different private asset classes?

12:00
Panel Discussion: Best practice for building relationships with portfolio companies

- Effective management and monitoring of portfolio performance
- CFOs and COOs involvement in portfolio level value creation
- Working with operating partners and your CFO/COO equivalents within the portfolio companies
- What rewards will you reap from building and maintaining these successful relationships?

Christopher Parmo, CFO, **Verdane**
Peter McKenzie, CFO, **Anticipa**

12:40
Closing interview: to be confirmed

13:00
Networking lunch

14:00
Close of conference