

# CFOs & COOs Europe 2021

## 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?

**Moderator: Tom Alabaster**, Partner & Head of EMEA Funds, **Ropes & Gray**

**Hina Ahmad**, COO, **Capital Dynamics**

**Rachel Fenwick**, COO/CFO, LaSalle Global Partner Solutions, **LaSalle Investment Management**

**Nick Latner**, Finance Director, **Hg Capital**

**Sarah Shackleton**, Administrative Partner, **Development Partners International**

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

**Moderator: Danielle Wilson**, Global Private Equity Sales, Europe Team Leader, **J.P. Morgan**

**Suzie Ruffley**, Director, Head of People, **Foresight Group**

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?

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- 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**

**Michaela Strempl, COO, Alternatives, BlackRock**

**Peter Dunbar, Private Equity Specialist, UNPRI**

**Omar Dapul, International Head of Solutions Engineering, Allvue Systems**

**10:30**

**Interview: Content to be confirmed**

**Moderator: Simon Shipgood, Regional Director, EWM Global**

**Paul Cunningham, CFO, Helios Investment Partners**

**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?

**Katja Baur, CFO, Montana Capital Partners**

**José Benedicto, Partner, Shard Credit Partners**

**Christian Hinze, COO, StepStone Group**

**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?

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**Moderator: Karine Litou**, Deputy Head of Private Capital, **BNP Paribas Securities Services**

**Dr. Dimitris Matalliotakis**, Head of Information Systems, **AssetMetrix**

**Marco Hinz**, COO, **Crosslend**

**Sahem Gulati**, Private Assets Capability Lead, Strategy & Consulting, **M&G Investments**

**13:00**

## **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

**Moderator: Reserved**

**Leo Scanavino**, Finance Director, **RJD Partners**

**Maqbool Mohamed**, CFO, **Clarion Gramercy**

**James Smith**, Head of Operations & Finance, **ARA Venn**

**Aaron Kienwald**, COO, **Oakley Capital**

**Manoj Jain**, Director – Group Finance Operations, **3i Group**

**Tina Page**, COO, **MV Credit**

**13:45**

**Lunch and networking break**

**14:45**

**Functional breakouts**

<b>Stream A – Finance and Regulation</b>	<b>Stream B - Operations and Technology</b>
<p><b>14:45</b> <b>Mapping out your legal framework as the regulatory screws tighten on private assets</b></p> <ul style="list-style-type: none"><li>• SFDR, EU Taxonomy and other regulatory hurdles causing the biggest headaches at present</li><li>• Ensuring that you have a legal and regulatory set-up that works for your business</li></ul>	<p><b>14:45</b> <b>Becoming a data-driven private fund manager</b> How are the lines between infrastructure, real estate and other asset classes continuing to blur?</p> <ul style="list-style-type: none"><li>• Finding a data management solution that works to scale for your firm</li><li>• Connectivity between systems – why this holds the key to data aggregation</li></ul>

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- Best practice when working with legal third parties and harnessing their expertise
- How finance functions are coping with increasing legal and regulatory spend

**Diana Meyel**, Managing Partner, CFO/COO, **Cipio Partners**

**Ayesha Singh**, Legal Counsel, **Muzinich & Co.**

**Tom Hodge**, General Counsel & CCO, **Glendower Capital**

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

**Daniel Bartsch**, COO, **Creditshelf**

**Harry Pampiglione**, Portfolio Analytics & Data Science Manager, **Lloyds Development Capital**

**Marcello Falcone**, Portfolio Monitoring, **Investindustrial**

**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

**Niyamat Fazal**, CFO, **DWS Infrastructure**

**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

**Juri Pervjakov**, Finance & Technology Director, **BaltCap**

**Eric Lazear**, COO, **Adit Ventures**

**Ash Patel**, IT Director & Head of Cyber, **ECI Partners**

**16:15**

**Afternoon Networking Break**

**16:40**

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

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- 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

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

**Martina Sanow**, Partner, **Hg**

**Marc Dumbell**, CFO & COO, **Campbell Lutyens**

**Caron Aitken**, Human Resources & Operations Manager, **Climate Fund Managers**

17:20

Off the record - audience roundtable discussions over drinks:

- **Managing FX at the fund level** *facilitated by Debojit Mukherjee*, COO, **Agilitas Private Equity**
- **Challenges around bank clients – Basel and more Basel & more** *facilitated by Christian Schnabel*, Managing Director, Head of Product Finance, **Golding Capital Partners**
- **Gaining control of your legal spend**
- **What will the future of private asset fundraising look like?**
- **Operational strategy & organisational design across private assets** *facilitated by Sahem Gulati*, Private Assets Capability Lead, Strategy & Consulting, **M&G Investments**
- **Carry expectations in the post-Covid era** *facilitated by Nigel Mills*, Director, **MM&K**
- **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

<b>CFOs and COOs in private equity</b> <i>Facilitated by Jasi Halai</i> , Group Financial Controller &	<b>CFOs and COOs in private debt</b> <i>Facilitated by Andrew Haywood</i> , CFO, <b>Park Square Capital</b>	<b>CFOS and COOs in infrastructure</b> <i>Facilitated by Colm Walls</i> , CFO, <b>Iona Capital</b>	<b>CFOs and COOs in real estate</b> <i>Facilitated by Dr. Holger Braun</i> , CFO, <b>Allianz Real Estate</b>
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Operating Officer, 3i Group			
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**09:45**

**Opening presentation: Courageous Leadership**

*In volatile and challenging times, research has shown that the one characteristic that sets successful leaders apart can be summarised in one word: courage.*

*This session gives you and your team the mindset and **practical tools** to become more courageous, to act and take the necessary risks to be truly effective.*

*This action-packed and practical keynote will provide participants methods to:*

- Evaluate and optimize their own leadership style and values.
- Build Courage, Increase productivity and focus and reduce stress.
- Create a culture where people admit to and learn from mistakes, fostering team collaboration, creativity and long-term term success.

**Peter McKenzie, CFO, Anticipa**

**10:15**

**Panel Discussion: Assessing the future of private investments in Europe**

- 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?

**Martina Macpherson, Head of ESG Strategy, ODDO BHF Asset Management & Private Equity**

# CFOs & COOs Europe 2021

**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?

**Moderator: Shuli Levy, CFO/COO, Expedition Growth Capital**

**Christopher Parmo, CFO, Verdane**

**Peter McKenzie, CFO, Anticipa**

**Mandar Kulkarni, CFO, Blue Water Energy**

**Nigel Diesveld, CFO, HPE Growth**

**12:40**

**Closing interview: How python modelling is set to improve investment decisions, private fund management and investor relations**

**Charles Foucard, CFO & Head of Development Strategy, Pictet Private Markets**

**13:00**

**Networking lunch**

**14:00**

**Close of conference**