

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**

Jamie Lyon, European CFO/COO, **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**

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

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- 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**

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?

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

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

CFOs & COOs Europe 2021

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

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

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**

13:40

Lunch and networking break

14:45

Functional breakouts

Stream A – Finance and Regulation	Stream B - Operations and Technology
<p>14:45 Mapping out your legal framework as the regulatory screws tighten on private assets</p> <ul style="list-style-type: none">• 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	<p>14:45 Becoming a data-driven private fund manager How are the lines between infrastructure, real estate and other asset classes continuing to blur?</p> <ul style="list-style-type: none">• 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

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<ul style="list-style-type: none"> • Best practice when working with legal third parties and harnessing their expertise • How finance functions are coping with increasing legal and regulatory spend <p>Diana Meyel, Managing Partner, CFO/COO, Cipio Partners Ayesha Singh, Legal Counsel, Muzinich & Co. Tom Hodge, General Counsel & CCO, Glendower Capital</p>	<ul style="list-style-type: none"> • 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 <p>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</p>
<p>15:30 Traditional finance priorities for 2021 and beyond</p> <ul style="list-style-type: none"> • 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 <p>Niyamat Fazal, CFO, DWS Infrastructure</p>	<p>15:30 Combating increasingly sophisticated cyber threats</p> <ul style="list-style-type: none"> • 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 <p>Juri Pervjakov, Finance & Technology Director, BaltCap Eric Lazear, COO, Adit Ventures Ash Patel, IT Director & Head of Cyber, ECI Partners</p>

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

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- 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**

Fabrice Dumontheil, CFO, **Penta Investments**

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*
- **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** *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

CFOs and COOs in private equity <i>Facilitated by Jasi Halai, Group Financial Controller & Operating Officer, 3i Group</i>	CFOs and COOs in private debt <i>Facilitated by Andrew Haywood, CFO, Park Square Capital</i>	CFOs and COOs in infrastructure <i>Facilitated by Colm Walls, CFO, Iona Capital</i>	CFOs and COOs in real estate <i>Facilitated by Dr. Holger Braun, CFO, Allianz Real Estate</i>
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CFOs & COOs Europe 2021

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

12:00

CFOs & COOs Europe 2021

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