

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?

Hina Ahmad, COO, Capital Dynamics

Jamie Lyon, European CFO/COO, LaSalle Investment Management

Nick Latner, Finance Director, Hg Capital

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
- Future impacts on costs, technology, processes and reporting

Steve Darrington, CFO, Phoenix Equity Partners

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Marie Joyce, CFO, NTR
Michaela Strempl, COO, Alternatives, BlackRock
Peter Dunbar, Private Equity Specialist, UNPRI

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?

Lindsey Ord, Chief Finance & Risk Officer, Climate Fund Managers
Dr. Dimitris Matalliotakis, Head of Information Systems, AssetMetrix
Marco Hinz, COO, Crosslend

13:00

The eternally evolving debate: Out-sourcing vs in-house considerations

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- 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**

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

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 • 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>	<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 • 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</p>

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<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>Daniel Bartsch, COO, Creditshel</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</p>
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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

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**

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- 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	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
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09:45

Opening 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

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

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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

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**

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