

Private Equity
International

CPE credits available

CFOs & COOs Fall Forum All Access

September 22-23, 2021 | Eastern Time (ET)
Virtual, Available Anywhere

Connect with your PE & VC CFO and COO peers



To learn more, visit:
peievents.com/en/event/cfos-coos-fall-forum/

Contents

- » [Agenda highlights](#) ➔
- » [Speakers](#) ➔
- » [Networking opportunities](#) ➔
- » [What is CFO All Access?](#) ➔
- » [Membership calendar](#) ➔
- » [Current members](#) ➔
- » [CFO All Access membership options](#) ➔
- » [Event sponsors](#) ➔

CFOs & COOs Fall Forum

Day One Agenda - September 22, 2021

10:25	PEI Welcome		
10:30-11:20	Analyzing how the economic climate, new administration and pandemic have impacted PE and VC		
11:20	Morning break		
11:35-12:25	Fundraising practices and investor relations in a hybrid environment		
12:30-1:20	Navigating the current tax environment		
1:20	Lunch		
1:50-2:40	Track A < \$2B AUM	Track B \$2B-\$10B AUM	Track C > \$10B AUM
	Benchmarking against the industry and comparable firms	Innovative technology deployment and use in PE/VC firms	Strategies to consistently drive operational efficiency at your firm
2:45-3:00	Q&A for Track A: Benchmarking panel	Q&A for Track B: Technology panel	Q&A for Track C: Operational efficiency panel
3:05-3:55	Making a call on outsourcing firm functions	What should be on your compliance and regulation radar?	Industry developments: tax and legal structuring of secondary transactions
4:00-4:15	Q&A for Track A: Outsourcing panel	Q&A for Track B: Compliance panel	Q&A for Track C: Secondary panel
4:15	Afternoon break		
4:30-5:20	Carry structuring and allocation approaches—an analysis of the tactics and models		
5:25-6:00	Keynote Interview		
6:00	End of day one		

CFOs & COOs Fall Forum

Day One Agenda - September 23, 2021

10:00	CFOs and COOs Think Tank (invite only)	
11:05 - 11:55	Surveying valuation methodology and metrics	
12:00	Track A < \$5B AUM	Track B > \$6B AUM
	Think Tank Optimizing management company operations	Think Tank Optimizing management company operations
12:50	Lunch break	
1:20-2:10	Implementing an effectual process to approach and deal with ESG and diversity	
2:15-3:05	How firms are utilizing credit lines and managing capital calls in the current market	
3:05	End of conference	

Hear from **leaders in private equity**

[View all speakers ↗](#)



Giorgio S. Boero
Chief Financial
Officer
Mereo Capital
Partners LLC



Blinn Cirella
CFO
Saw Mill Capital



Chester R. Dawes
COO & CFO
Melody Investment
Advisors LP



Mark Feirman
Chief Financial
Officer and Partner
Cross Rapids Capital
LP



Josh Gilbert
CFO
Freestyle Capital
Management



Randy Guttman
General Partner &
Head of Operations
JMI Equity



Rich Herrick
CPA,CVA,CFO,
NextGen Growth
Partners LLC



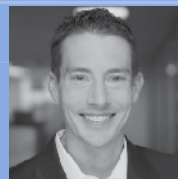
Jeremiah J. Loeffler
COO - Credit
Crestline Investors
Inc.



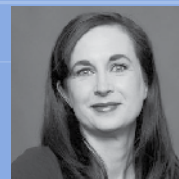
Marc Miele
Director - Finance
and Operations
American Family
Ventures



Patty Nykodym
Chief Financial
Officer and Chief
Compliance Officer
FFL Partners



Chase Paxton
Director of Finance
& Valuations
NGP Energy Capital
Management



Sara Shackelford
Chief Financial
Officer
Canapi Ventures
Capital

Join us for an **in-person** networking reception

[View reception](#) ➔

Disconnect from a virtual world and plan to re-connect with CFO and COO colleagues for **Cocktails in the Park**. The private equity CFOs and COOs community will gather in a relaxed environment to catch-up with one another and enjoy a much-needed networking reception.

Following the virtual CFOs & COOs Fall Forum you'll be able to join your peers for conversation and cocktails on **Thursday, September 23 at 5:00-7:00 PM ET** on the rooftop at **Bryant Park Grill**.

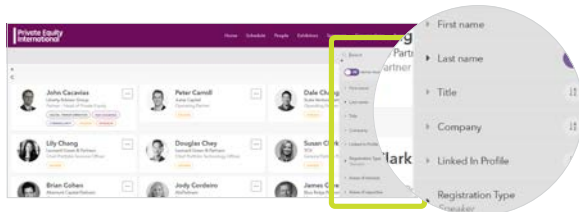
You must be a CFO All Access member to attend this event. Space is limited, register today.



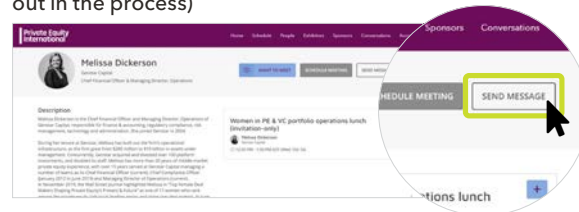
Bryant Park Grill
25 W 40th St, New York, NY 10018

Unlock superior **networking opportunities** with our virtual platform

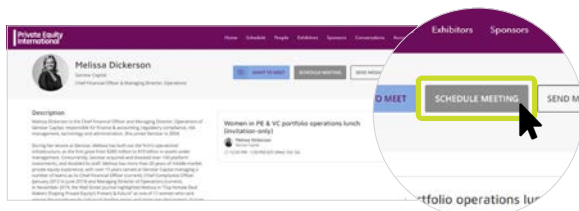
Search other members by name, title, specialization, geography, and areas of interest



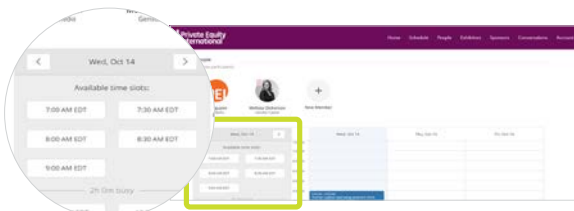
Send a direct message that goes to the recipient's email and platform inboxes (please note no emails are given out in the process)



Schedule a meeting on the platform



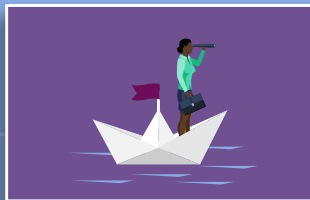
Arrange a meeting at a time that suits you with year-round access to the community list



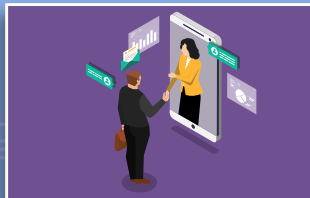
What is **CFO All Access**?

It is a 12-month membership service

made up of a global community of CFOs, COOs, and senior finance executives built on a 20-year heritage of convening financial leaders in private equity. Network with your private equity and venture capital peers, exchange ideas and best practices, and participate in interactive discussions.



Connect year-round with CFOs, COOs, and senior finance executives. Participate in monthly Forums, deep dives, and discussions or take the conversation offline



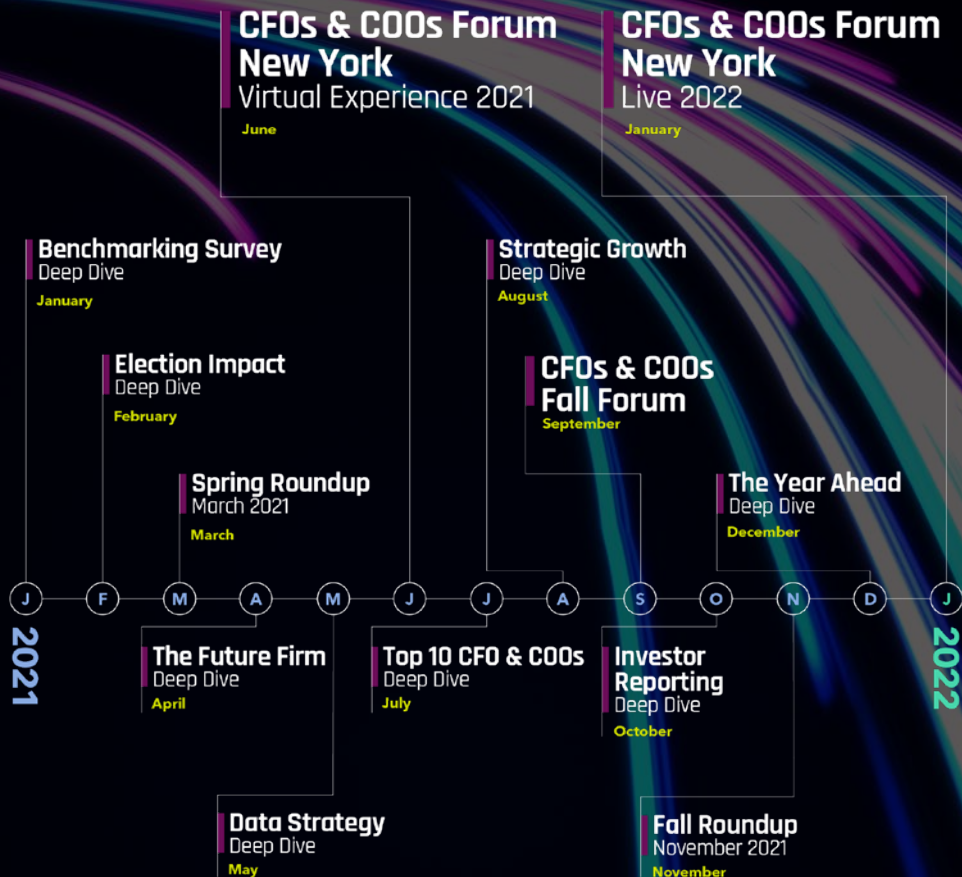
Watch sessions at any time; watch live or catch-up on demand throughout the year



Search our member directory and make new connections by sending private messages and scheduling meetings

What does a **yearlong** membership look like?

***Please note:**
annual agenda is subject to change



Join our **growing community** of CFOs & COOs

Request a trial ➔

Member companies include:

- | | | | |
|-----------------------------------|-----------------------------------|-------------------------------------|-------------------------------------|
| » ABRYS Partners | » Greyhound Capital Europe | » New Leaf Venture Partners | » Resource Land Holdings |
| » Activant Capital Group | » HCI Equity Partners | » Newlight Partners | » Revelstoke Capital Partners |
| » Advent International Corp | » Investindustrial | » Nonantum Capital Partners | » Safanad |
| » Alcion Ventures | » JMI Equity | » Nordic Capital | » SFW Capital Partners |
| » American Family Ventures | » Kohlberg & Company | » Oceansound Partners | » Siris Capital Group |
| » American Industrial Partners | » Landmark Partners | » Omega Funds | » Solum Partners |
| » Avista Capital Partners | » Laramar Group | » Onex | » Stripes |
| » BBAM US LP | » Linden Capital Partners | » Orbimed Advisors | » SVB Capital |
| » BlackRock | » Lindsay Goldberg | » ORIX Capital Partners | » Tailwater Capital |
| » Center Rock Capital Partners LP | » LLR Partners | » Ottawa Avenue Private Capital | » The Catalyst Capital Group Inc |
| » Crestview Advisors | » Lovell Minnick Partners | » Paladin Capital Group | » The Cynosure Group |
| » Fengage Asset Management | » Luther King Capital Management | » Palladin Consumer Retail Partners | » The Meridian Group |
| » FFL Partners | » Madryn Asset Management LP | » Pamlico Capital | » Thomas H. Lee Partners, L.P. |
| » Five Point Energy | » Marlin Equity Partners | » Patria Investments | » TowerBrook Capital Partners L.P. |
| » Flexpoint Ford | » MassMutual | » Peak Rock Capital | » Trilantic Capital Management L.P. |
| » Fundamental Advisors LP | » Melody Investment Advisors | » Perceptive Advisors | » Trive Capital |
| » Goldman Sachs | » MiddleGround Capital Management | » Performance Equity Management | » Versant Ventures |
| » Grain Management | » MidOcean Partners | » Portland Private Equity | » Viking Global Investors LP |
| » Great Hill Partners | » New Harbor Capital | » Promus Holdings | » VMG Partners |
| » Greenspring Associates | | | |

Learn more about CFO All Access memberships

The CFOs & COOs Forum is included in your CFO All Access membership. A membership includes access to community networking, attendance at all virtual and in-person events, including the CFOs & COOs Forum New York 2022, plus all the monthly content delivered virtually on the platform.

This membership is for finance and operation professionals at private equity/venture capital firms only. More information can be found at peievents.com/en/event/cfo-all-access

Single membership: \$3,295

Team membership: \$6,495

A team membership includes up to 5 members.
Looking to include 5+ in your membership?

Contact **Bes Selmani** at
Bes.s@peimedia.com or +1 212 796 8339

Interested in learning more and previewing the membership platform?

Our team will be happy to assist you.

Request a trial ➔

For program information:

Shamara Ray

shamara.r@peimedia.com

+1 212 633 1453

For sponsorship opportunities:

Cristiana Crocco

cristiana.c@peimedia.com

+1 646 921 0923

For registration questions:

Customer Services

regny@peimedia.com

+1 212-633-1073

Sponsors

[View all sponsors ➔](#)

Platinum



Sponsors



Media Sponsor



Host Publications



For details on sponsorship opportunities, service providers and/or other solution providers to PE/VC CFOs should contact contact: **Cristiana Crocco** at **cristiana.c@peimedia.com** or call **+1 646 545 4429**