

Private Equity
International

CFOs & COOs Forum New York All Access

April 27-28, 2022
Sheraton New York Times Square Hotel

Redefining the private equity CFO & COO role

PEI

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CFOs & COOs Forum 2022

Day one agenda—April 27, 2022

7:45	Registration - continental breakfast				
8:30	PEI Welcome				
8:40	Chair's welcome				
8:45	Keynote interview				
9:30	9th annual EY global CFO and COO benchmarking survey results				
10:30	Networking break				
11:00	Think tank A - GPs only	Think tank B - GPs only	Think tank C - GPs only	Think tank D - GPs only	Think tank E - Service providers only
	Bolstering the future of the firm with a solid succession plan	Is private equity going through a talent revolution?	Are SPACs on your firm's radar for 2022?	PE compensation trends	What every GP expects from their service providers
12:00	Networking break				
1:30	Breakout series I				
	Track A	Track B	Track C	Track D	Track E
	Utilizing automation to maintain a competitive edge	Establishing a successful dynamic for internal and external fundraising strategies	One year later: tax reform and the Biden administration	Reevaluating methods and implementing new approaches for streamlining firm operations	Technology spotlight
2:25	Breakout series II				
	Track A	Track B	Track C	Track D	Track E
	Orchestrating the management, normalization and utilization of data	Holding on: improving performance and returns through continuation funds	How private equity is adjusting valuation methodology	COO strategic initiatives: moving the back office toward operational efficiency	Technology spotlight
3:15	Networking coffee break				
3:45	How can CFOs and COOs be more additive to firm initiatives?				
4:35	Keynote interview				
5:20	Cocktail reception and end of day one				

CFOs & COOs Forum 2022

Day two agenda—April 28, 2022

7:45-9:00	Think tanks			
	CFOs and COOs Think Tank (invite only)	CCOs Think Tank (invite only)		Senior Finance Executive Think Tank (invite only)
8:15	Continental breakfast			
9:10	Opening remarks			
9:15	Keynote interview			
10:00	Adapting to hybrid work environments in a historically in-office culture			
10:50	Networking break			
11:20	Breakout series III			
	Track A	Track B	Track C	Track D
	What's in store for the future of carry?	What's ahead for PE compliance: the next three years?	Analyzing how technology is interconnected with firm success	How firms approach and view the use of subscription lines
11:20	Interactive roundups			
	Roundup A Aligning ESG commitment with corporate strategy		Roundup B Ensuring outsourced services are aligned with firm interests	
12:15	Working groups			
	Group A Building finance teams	Group B Cybersecurity policies and risk mitigation		Group C Secondary market: driving growth in fund restructuring
1:00	Networking luncheon			
2:05	Key considerations for addressing diversity, equity and inclusion issues in private equity			
3:00	Evolution and normalization of investor reporting			
4:00	Keynote fireside chat			
4:30	End of conference			

Featured **keynote speaker**



Vik Sawhney Chief Administrative Officer **Blackstone**

Vik Sawhney is Blackstone's Chief Administrative Officer and Global Head of Investor Relations & Business Development. Before joining Blackstone in 2007, Mr. Sawhney worked as a Managing Director in the Financial Sponsors Group at Deutsche Bank, where he was responsible for managing the firm's relationships with Blackstone and several other large private equity firms. Prior to joining Deutsche Bank, Mr. Sawhney was an Associate at the law firm of Simpson Thacher & Bartlett. Vik represented Blackstone as a Rockefeller Fellow during 2010-2011. He currently serves as Board Chair on the Board of Dream, an east Harlem social services and educational organization.

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Hina Ahmad
Senior Managing
Director & Chief
Operating Officer
Capital Dynamics



Brandon Baudin
Chief Financial
Officer
The Sterling Group



Noah Becker
Chief Financial
Officer
LLR Partners



John Beczak
Chief Financial
Officer
Resource Capital
Funds



Tony Braddock
Chief Financial
Officer
Stellex Capital
Management LLC



Tracey Chaffin
Partner and
Chief Financial
Officer
Pamlico Capital



Joshua Cherry-Seto
Managing Director,
CFO & CCO
Blue Wolf Capital
Partners



Sam Cohn
Chief Financial
Officer -
Credit & Venture
Perceptive Advisors



Dina M. Colombo
Partner
COO & CFO
GreyLion Capital



Steven DeCillis II
Partner & Chief
Financial Officer
AEA Investors LP



Gerald Esposito
Partner
CFO & CCO
Newbury Partners



April Evans
Partner
CFO and COO
Monitor Clipper
Partners

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Adam Felsenthal
General Counsel
Great Point Partners



James Gaven
Senior Counsel and
Chief Compliance
Officer
Welsh Carson
Anderson & Stowe



**Jacqueline
Giammarco**
Managing Director
and Chief Compliance
Officer
Stone Point Capital
LLC



Jeffrey Gilbert
Chief Operating
Officer and General
Counsel
Carnelian Energy
Capital



Christopher J. Gimbert
Chief Financial
Officer
Star Mountain Capital



**Kara Goodloe
Harling**
Senior Managing
Director and Chief
Compliance Officer
Mountain Capital
Management



Omar Hassan
Principal,
Chief Financial
Officer and Chief
Compliance Officer
Cloverlay Partners



John Herr
Chief Financial
Officer
Francisco Partners



Stephen E. Hoey
Chief Financial
Officer
Vertica Capital
Partners



Devin Holden
Compliance Director
NovaQuest Capital
Management



Ruth E. Horowitz
Vice President
Equity Mobilization
Division
IFC Asset Management
Company



Sandra Kim-Suk
Chief Financial
Officer
Engine No. 1

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Jill Lampert
Chief Financial
and Administrative
Officer
NGP Energy Capital
Management



Richard Lee
CPA,
Chief Financial
Officer
The Cynosure Group



KC Mahan
Associate Vice
President
The Meridian Group



Thomas Mayrhofer
CFO and COO
EJF Capital



Nickie Norris
Senior Partner,
COO, CCO
New Heritage Capital



Kristine O'Connor
Managing Director
and Chief Financial
Officer
Franklin Park



Stephanie Paine
Partner and Chief
Financial Officer
Pritzker Private
Capital



Deneshea L. Phelps
Chief Financial &
Compliance Officer
Arlington Capital



Kevin Power
Head of Compliance -
Americas
Pantheon



**Heramb
Ramachandran**
Chief Financial
Officer
Sciens Capita



Kevin Richardson
Finance Director
Bregal Sagemount



Giulianna Ruiz
Partner, General
Counsel and Chief
Compliance Officer
Trilantic Capital
Management L.P.

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Sanjay Sanghoo
COO, CFO and CCO
Delos Capital



Daren Schneider
CFO & CCO
JLL Partners LLC



Béla Schwartz
CFO
The Riverside
Company



Kshitij Shah
Chief Financial Officer
& Chief Compliance
Officer
WestBridge Capital
Partners



Aaron Simkovich
Chief Financial
Officer
Maranon Capital
L.P.



Katie Stitch
Managing Director
W Capital Partners



Lance Taylor
Partner & CFO
HGGC



Stephen Wedemeyer
Chief Financial
Officer
Carnelian Energy
Capital



Irene Willard
Chief Financial
Officer
Dunes Point Capital



Morgan Wilwol
Controller
Activant Capital
Group LLC



Alisa A. Wood
Member,
Head of Private
Market Strategies
KKR



Patty Xu
CFO
Catalyst Investors

Venue and hotel

All conference sessions will take place at the Sheraton New York Times Square Hotel.

We also have reserved a room block at the hotel for all attendees with a discounted rate. To reserve your room at the hotel please use the link below or call reservations and mention **PEI CFOs & COOs Forum** at **1-888-627-7067**.

Book a room ➞



The Sheraton New York Times Square Hotel
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Registration includes admission to CFOs & COOs Forum New York, plus 12-month access to exclusive Forums, Roundups and networking events.

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