Private Equity International

CFOs & COOs Forum New York 2022

April 27-28
Sheraton New York Times Square Hotel

CFOs & COOs Forum New York 2022 Agenda

Day 1: Wednesday, April 27

8:30-9:15 **Registration – continental breakfast**

9:15 **PEI welcome & chair's introduction**

Seth Kerker, Director Events – Americas, **PEI**

9:25 **Chair's welcome**

John Scerbo, Former CFO, **L Catterton** and Founding Member, **Private Equity CFO Association New York Chapter**

9:30 **9th annual EY global CFO and COO benchmarking survey results**

In this session, we will review the results of the ninth annual survey of CFOs and COOs from across the globe. We've collected extensive data on people, processes, and planning for the future. The insight gained from the survey will provide the foundation for a robust discussion by an esteemed panel of CFOs and COOs representing a broad spectrum of private funds.

Panelists

April Evans, Partner, CFO and CCO, **Monitor Clipper Partners**

Stephanie Paine, Partner and Chief Financial Officer, **Pritzker Private Capital**

Andrew W. Petri, Chief Financial Officer and Chief Compliance Officer, **Pfingsten Partners, L.L.C.**

Moderator

Kyle Burrell, Partner, Financial Services Office, **Ernst & Young LLP**

10:30 **Networking coffee break**

11:00 Think tanks

GP only

Bolstering the future of the firm with a solid succession plan

- Does your firm expect to see a succession event in the near future?
- Laying the groundwork for succession
- When is the right time to start identifying candidates?
- How much LP disclosure is required regarding succession plans?
- Determining if multiple candidates will be required to fill a role historically held by one person
- How often do firms meet to identify successors?
- Identifying successors by granting candidates some responsibility and authority to start to influence the business
- Putting a process in place for a seamless transition
- What does succession planning at end of fund life look like?

Facilitator

Stephen E. Hoey, Chief Financial Officer, Vertica Capital Partners

GP only

Is private equity going through a talent revolution?

- How are CFOs competing effectively in the war for talent?
- Will paying whatever it takes or providing other benefits/alternatives win the race for talent?
- Restoring the balance: closing talent gaps resulting from women leaving the workforce during the pandemic
- Making a case for return to office when other firms are offering remote options
- Increasing value of soft vs hard incentives—finding the right mix
- Inventive strategies for retaining next generation talent
- Do you incentivize using matching or leveraged coinvest?
- Assessing how to maximize and leverage existing employees

Facilitator

Todd Schneider, CFO & CCO, Delta Capital Partners Management LLC

GP only

Are SPACs on your firm's radar for 2022

- Projections on SPACs formation and IPOs in the year ahead
- Dissecting why PE is attracted to SPACs and the benefits of entering the evolving space
- Does an increase in SPACs signal that firms should be giving the option another look?
- Are SPACS an ideal way for firms to find liquidity and go public in a more controlled environment?
- How does your firm view the growing SPACs market's ability to bring companies public?
- What has been the LP reception to the rising popularity of SPACs?

Facilitator

Isaiah Massey, Managing Director –Chief Financial Officer, CAZ Investments LP

11:00 Think tanks

GP only

PE compensation trends

- Conducting an analysis of your firm's compensation and benefits
- CFO compensation trends
- What is competitive compensation by level of investment professional?
- How do you compensate your employees? How does it compare to industry standards?
- Identifying opportunities to augment terms of compensation
- How do you incentivize employees?
- Utilizing compensation surveys to benchmark against peers
- Establishing a process to identify individual career goals to align opportunity and compensation

Facilitator

Mark Levitt, Chief of Staff, **Global Infrastructure Partners**

Service Provider only

What every GP expects from their service providers

- Private equity's mounting acceptance of outsourcing
- Methods for overcoming challenges with adopting new technologies
- Collaborating with service providers as partners
- Setting up regular touchpoints
- Having clear dialogue on what your provider is doing
- Making your service provider a part of the team
- Ensuring third-party due diligence

Moderator

Rod James, Senior Reporter, **Private Equity International and Secondaries Investor**

Panelists

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

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

Sandra Kim-Suk, Chief Financial Officer, **Engine No. 1**

Steven LaDew, Chief Financial Officer, **Cornell Capital**

Stephen Wedemeyer, Chief Financial Officer, **Carnelian Energy Capital**

12:00 Networking luncheon

1:30 - 2:20 Breakout series I

Track A

Utilizing automation to maintain a competitive edge

- Examining how automation is redefining PE firm processes
- How do you define emerging tech within your firm?
- How firms should be using emerging technologies to foster strategic growth
- Adopting systems to automate ILPA templates
- Budget friendly tools to help smaller firms automate
- Leveraging automation and visualization for better decision-making
- How do you sustain your advantage and/or not fall behind with the use of technology?
- Automating the back office

Moderator

Frank Anduiza, EVP, Head of Private Fund Sales, **Ultimus LeverPoint Private Fund Solutions**

Panelists

Rich Itri, SVP, Professional Services, **ECI**

Brad Pietras, Vice President & Controller, **Lightyear Capital**

Neeta Rastogi Singh, **Chief Operating Officer, Activant Capital Group LLC**

Track B

Establishing a successful dynamic for internal and external fundraising strategies

- Future direction of the CFO function during a fundraise
- Finding value-adds across the firm to contribute to the fundraise process
- Positioning the firm to be able to launch a new fund with existing resources and technology
- Will fundraising continue to employ virtual meetings?
- Making changes to how the firm presents in a virtual environment: scaling webinars, presentations and collateral
- How different are in-person and virtual due diligence meetings during fundraising?
- Fielding an increase in ESG policy questions
- Are placement agents playing a larger role in providing fundraising support?
- How are LPs utilizing track record data in the decision process?

Moderator

Anne Anquillare, CFA, Head of **CSC U.S. Fund Services**

Panelists

Tony Braddock, Chief Financial Officer, **Stellex Capital Management LLC**

Gerald Esposito, Partner, CFO & CCO, **Newbury Partners**

Christopher J. Gimbert, Chief Financial Officer, **Star Mountain Capital**

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

Track C

One year later: tax reform and the Biden administration

- Overview of tax legislation and regulatory changes
- Affirmative planning for potential tax changes
- Pivotal focus areas: corporate minimum tax, personal tax surcharge, carried interest and stock buyback tax
- Dissecting the impact of tax reform on senior professionals
- How does the increasing cash tax drive what firms do with portfolio companies?
- Impact of carry and interest limitations tax on portfolio companies
- Recent state and local tax developments – including the passthrough entity tax
- Investor sensitivities—fund structure and tax reporting
- Emerging cross-border tax developments – including BEPS 2.0
- What is on your radar at the fund or portfolio company level?

Moderator

Gerald Whelan, Tax Partner/Principal – EY Private Equity Tax Technical Leader, **Ernst & Young LLP**

Panelists

Noah Becker, Chief Financial Officer, **LLR Partners**

Béla Schwartz, CFO, **The Riverside Company**

1:30 - 2:20 Breakout series I

Track D

Re-evaluating methods and implementing new approaches for streamlining firm operations

- Surveying what is driving operational efficiency at the firm to uncover additional areas of opportunity
- Is your firm readying for value creation initiatives to drive efficiency?
- Assessing how the finance team can deliver efficiency to support the business
- Taking another look at outsourcing: which functions can be outsourced and what remains in-house?
- What technologies are being utilizing across the firm from an operational perspective?
- Understanding who is responsible for and owns the system initiatives at your firm
- Adhering to ILPA standards to address increasing LP expectations

Moderator

Daisy Tung, Partner, Advisory, KPMG

Panelists

Brandon Baudin, Chief Financial Officer, **The Sterling Group**

Jay Farber, Head of Growth, **Juniper Square**

Richard Lee, CPA, Chief Financial Officer, **The Cynosure Group**

Nickie Norris, Senior Partner, COO, CCO, **New Heritage Capital**

Track E

Technology spotlight

Discover new automated solutions firms are implementing to address challenges and the best technology to help with accounting, transparency, reporting and more.

1:30

Empowering investors with next generation onboarding

Tony Paredes, Vice President, Head of Global Business Development, **Anduin**

1:45

Employing User-Centric Portfolio Monitoring to Increase Productivity

Andrew Edelman, VP of Sales, **Cobalt, a FactSet Company**

2:00

How to simplify MIP/option admin & waterfall analysis for PE firms

Jeremy Barlow, Head of Commercial, **Diligent Investors**

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2:25 - 3:15 Breakout series II

Track A

Orchestrating the management, normalization and utilization of data

- Growing importance of data across the firm
- Models for getting an essential database from an inherently complex task
- Best practices for achieving better organization of data
- Finding a complimentary approach to consuming data from an Excel spreadsheet
- Pulling data in a way that can be managed, utilized and shared—what tools do you need?
- Steps for maintaining good, quality data over time
- Deploying a company-wide platform to enable firmwide data solutions
- Strategies for cleansing data and quality control
- Is your firm using data warehouses, data lakes or business intelligence tools?
- Analyzing firm data to make better investment decisions
- How are firms utilizing data in a way that's forward looking?
- Data protection risk
- Cybersecurity best practices and protocol

Moderator

Tim Buchner, COO, Alpha for Private Markets, **State Street**

Panelists

Jeff Bohl, CFO, **Ontra**

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

Jill Lampert, Chief Financial and Administrative Officer, **NGP Energy Capital Management**

Daren Schneider, CFO & CCO, JLL Partners, **LLC**

Track B

Holding on: improving performance and returns through continuation funds

- Unraveling the pros and cons of seeking longer term holds on companies
- Are continuation funds an option for addressing supply and demand issues?
- How do continuation funds de-risk assets?
- Determining which assets have the potential to grow doing a continuation fund
- What strategic approaches can firms take to extend funds and achieve positive performance results?

Moderator

Graham Bippart, Editor, **Private Funds CFO**

Panelists

Sara Huang, Managing Director, **Ardian**

Bryan D. Hunkele, Partner, **Ropes & Gray LLP**

Katie Stitch, Managing Director, **W Capital Partners**

Track C

How private equity is adjusting valuation methodology

- State of valuations in a hot leverage and pricing market
- What does PE do to prepare for 2022?
- GP attitude towards lifting valuations in line with the large market valuation uplift
- Valuations and audit review: are firms using a third-party or doing it in-house?
- Benchmarking whether CFOs are responsible for valuation and how it's evolved over time
- Does the investment team or finance/accounting complete valuations?
- Reviewing valuation policy changes made during the pandemic to determine the need to revert back
- Is the SEC focusing more on valuation and disclosure?
- Establishing a centralized data collection process with the finance and/or deal team
- Are firms doing valuations based on WACC or making adjustments?
- Best practices and where the industry is heading

Moderator

Brian Garfield, CFA, ASA, Managing Director, **Lincoln International**

Panelists

John M. Beczak, Chief Financial Officer, **Resource Capital Funds**

Adam Freedman, Chief Compliance Officer and Associate General Counsel, **Angelo Gordon**

Igor Rudfeld, Senior Vice President, **Harbourvest**

2:25 - 3:15 Breakout series II

Track D

COO strategic initiatives: moving the back office toward operational efficiency

- Reassessing back office operating models to identify efficiencies
- Achieving efficiency gains through back office deal tracking, accounting and CRM software integration
- Identifying the operational elements COOs need to tackle as firms change
- Managing growth and scale while establishing processes to meet new demands from LPs
- Moving the firm toward better integrating systems
- Wading through point solutions to ensure the firm is getting the right visibility into investments
- Strategies for securing buy-in within the firm when operational efficiencies are needed and require a sizable investment
- Putting resources in place to enable you to achieve more and decrease day-to-day tasks

Moderator

Barnaby Piggott, CEO, **Atlas by Holland Mountain**

Panelists

Jeffrey Gilbert, Chief Operating Officer and General Counsel, **Carnelian Energy Capital**

Vincent Korta, CFO & COO, **2B Living**

Heramb Ramachandran, Chief Financial Officer, **Sciens Capital Management LLC**

Sanjay Sanghoee, COO, CFO and CCO, **Delos Capital**

Track E

Technology spotlight

Discover new automated solutions firms are implementing to address challenges and the best technology to help with accounting, transparency, reporting and more.

2:25

Solving investor accounting complexities related to waterfall allocations and tracking LP commitments, calls and distributions

Dinesh Shastri, Partner and Head of Product Development, **OpEff Technologies**

2:40

Introducing FX-as-a-Service: the evolution of currency management

Eric Huttman, Chief Executive Officer, **MillTechFX**

3:15 Networking coffee break

3:45 How can CFOs and COOs be more additive to firm initiatives?

- Evolving skills: how the role has changed and will function 5-10 years from now
- Tools CFOs and COOs use to effectively manage the growing demand on time and resources
- Prioritizing responsibilities when concurrent deliverables have critical levels of importance
- How are CFOs enhancing the support provided to portfolio companies?
- How do you split CFO vs COO responsibilities?
- Weighing in on outsourcing decisions
- Managing in-house and outsourced functions
- CFO role in the IR and fundraising processes
- How CFOs are assisting in making portfolio companies as profitable as possible
- Playing a strategic role in the firm's considerations about its balance sheet
- Different hats CFOs wear throughout the span your career
- Overcoming challenges around adopting new technologies

Moderator
Michael Patanella, Managing Partner - Asset Management, **Grant Thornton**

Panelists
Joshua Cherry-Seto, Managing Director, CFO & CCO, **Blue Wolf Capital Partners**
Dina M. Colombo, Partner, COO & CFO, **GreyLion Capital**
Rishi Kotecha, Head of General Partner Segment, **BlackRock**
Thomas Mayrhofer, CFO and COO, **EJF Capital, LLC**

4:35 Keynote interview

Vik Sawhney, Chief Administrative Officer, **Blackstone**

Interviewer:
Rich Melville, Editorial Director – U.S., **PEI**

5:20 Cocktail reception and end of day one

Day 2: Thursday, April 28

8:15-9:45

CFOs and COOs Think Tank (invite only)

CCOs Think Tank (invite only)

Senior Finance Executive Think Tank (invite only)

9:00 **Continental breakfast**

9:55 **Chair's opening remarks**

John Scerbo, Former CFO, **L Catterton** and Founding Member, **Private Equity CFO Association New York Chapter**

10:00 Adapting to hybrid work environments in a historically in-office culture

- Is remote and hybrid working the new normal for private equity?
- Exploring the purpose of "office" for your organization?
- What are firms doing to address the ever-increasing demand for work from home?
- Striking the right balance for your firm: number of days per week, rolling, etc.
- The role of behavioral health in adapting to hybrid working environments
- Hybrid work environment cultural and organizational design elements
- Importance of having the right technology in place to operate productively in a remote/hybrid environment
- Methods for fostering engagement and growth of hybrid/remote back-office employees when the investment team is in the office
- How to monitor performance and identify high performers
- Conducting remote finance team oversight in a post-COVID work environment
- Unintended consequences of people not being in the office
- Are firms concerned about attrition?
- How to attract and retain talent when other firms offer more appealing hybrid or remote arrangements

Moderator
Georges Archibald, Regional Managing Director—Americas, **Apex Group Ltd.**

Panelists
Tracey Chaffin, Partner and Chief Financial Officer, **Pamlico Capital**
Mark Magerman, PhD, PCC, Executive Coach, Organization Development Consultant, **Gestalt Works**
Lance Taylor, Partner & CFO, **HGGC**

10:50 **Networking coffee break**

11:20 – 12:10 Breakout series III

Track A

What's in store for the future of carry?

- Examining carry models that are simpler to administer and more equitable to manage
- Carry vesting schedules: what are firms doing?
- Examining GP carried interest waterfall structures and the impact on returns
- How do you think about who is entitled to carry, considerations?
- How does your firm allocate carry and who gets in the carry pool?
- Should founders spread carry more evenly down into the organization?
- What is the approach to fund new hires when all the carry has been allocated?
- Bracing for a change in tax legislation and whether carry will be taxed like regular income
- What kind of language are firms putting in LPAs to address the coming tax bill?
- Considerations for doing phantom carry
- Creative approaches for dealing with the carry rule

Moderator

Raoul Kamath, US Regional Marketing & Sales Director, **EWM Global**

Panelists

Kevin Richardson, Finance Director, **Bregal Sagemount**

Irene Willard, Chief Financial Officer, **Dunes Point Capital**

Patty Xu, CFO, **Catalyst Investors**

Track B

What's ahead for PE compliance: the next three years?

- What regulatory changes is the industry anticipating from SEC Chair Gensler?
- How are you being strategic in compliance?
- Common issues firms encounter with respect to fees and expenses?
- Implementing a process to ensure better data and reporting
- Should PE anticipate an uptick in exams and enforcement actions?
- Before the exam—considerations when preparing for a potential SEC visit
- Recommendations for utilizing outsourced compliance consultants
- CFO and COO accountability in the compliance process
- Tracking timeline initiatives and trends from one SEC Chair to the next
- Standing by for a prescriptive approach for the industry at large on ESG, reporting and disclosure requirements
- Regulations on the horizon: crypto, capital gains tax and carried interest
- New marketing rules

Moderator

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

Panelists

Adam Felsenthal, General Counsel, **Great Point Partners**

Matt Okolita, Head of Outsourced Business Services, **IQ-EQ**

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

11:20 – 12:10 Breakout series III

Track C

Analyzing how technology is interconnected with firm success

- Surveying the latest technology and tools for private equity
- Ensuring your technology is ideal for the firm's type of investments and required reporting
- Determining what system to use for fund accounting
- Leveraging technology to support waterfall calculations and carried interest allocations
- Tools for organizing data and metrics
- Providing necessary training and education for in-house use and remote access
- Uncovering common integration challenges when launching new technologies
- Incorporating user feedback into technology decisions
- The role next generation technologies are playing in the investment decision-making process

Moderator

Dean Schaffer, Managing Director, **Alter Domus**

Panelists

Saba Ahmad, Partner and Chief Operating Officer, **Turning Rock Partners**

Jonathan Balkin, Founder & Executive Director, **Lionpoint Group**

Jesse Burwell, CFO & Senior Managing Director, **Liberty Strategic Capital**

Sandra Kim-Suk, Chief Financial Officer, **Engine No. 1**

Track D

How firms approach and view the use of subscription lines

- Are you seeing an increase in the overall debt exposure in the funds?
- What type of facilities are being used and how long is debt outstanding before repayment?
- Using leverage to show increased returns given today's low interest rates
- Overview of hybrid facilities
- Employing asset backed facilities at the portfolio level
- What is the borrowing landscape like for your firm?
- Do you use subscription lines for actual leverage or for bridging purposes?
- SEC oversight into use of the line
- Why UBTI has been sensitive issues with investors
- Renewal process of subscription lines—what it entails
- Calculating performance in a way that takes out the impact of subscription lines
- DDQ and subscription line terms: how much you can call on commitments and how long do you keep it out there?
- How to leverage your subscription lines to enhance returns

Moderator

Mike Zack, Head of US Sales, **Hazeltree**

Panelists

Noah Becker, Chief Financial Officer, **LLR Partners**

Sam Cohn, Chief Financial Officer - Credit & Venture, **Perceptive Advisors**

Sarah G. Roth, CEO, **Argosy Capital**

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11:20 – 12:10 Interactive roundup discussions

Roundup A

Aligning ESG commitment with corporate strategy

- Advancing the firm from ESG awareness to implementing policies and procedures
- Taking steps to make ESG a part of the firm's DNA
- How are firms tracking and enforcing ESG within portfolio companies?
- Portfolio company ESG data: collection and frequency
- Presenting accurate ESG initiatives to potential LPs
- Tackling ESG reporting in response to more sophisticated LP questions
- New ESG regulatory requirements
- Examining the parameters and metrics of your ESG compliance policies
- What is the SEC focusing on with disclosures?

Facilitators
Dave Clauson, Director, BKD, **CPAs & Advisors**
Jacqueline Giammarco, Chief Compliance Officer and Managing Director, **Stone Point Capital LLC**
Devin Holden, Compliance Director, **NovaQuest Capital Management LLC**

Roundup B

Ensuring outsourced services are aligned with firm interests

- Checks and balances: getting comfortable with relinquishing a level of control to vendors
- Formalizing the vendor selection process to guarantee you pick the right partner
- Conducting service provider due diligence
- Cost allocation of outsourced solutions
- What are the hidden costs of insourcing vs outsourcing?
- How much time does outsourcing really save the firm?
- Examining the technologies needed to keep specific functions in-house
- Can a strong CFO network be an alternative to hiring or outsourcing?
- Having a productive and transparent relationship with your service providers
- Management of outsourcing in relation to regulatory oversight

Facilitators
Amy Knapp, Partner and Chief Operating Officer, **Corsair Capital**
Deneshea L. Phelps, Chief Financial & Compliance Officer, **Arlington Capital**
Jeanette Turner, Managing Director, Global Regulatory & Compliance Solutions, **SEI**

12:15 - 1:00 Breakout series IV - Working groups

Group A

Building finance teams

- Assessing what level of expertise you have in-house
- Evaluating whether to hire for the finance team or does it make more sense to outsource
- Focus on recruitment: using emerging/untraditional sources to assemble a pool of candidates
- Do your diligence: outlining requirements for third-party service providers
- Developing the junior finance team

Instructor

Charmone Adams, Advisory Senior Manager, **Grant Thornton LLP**

Group B

Cybersecurity policies and risk mitigation

- Where does cyber risk rank on the list of challenges your firm faces today?
- What are firms doing to proactively prevent hacks?
- What should be the internal process if your firm gets hit by a cyberattack?
- Using technology/ tools more robustly in cybersecurity initiatives
- Implementing a process to lead the cybersecurity charge for your portfolio companies
- Handling ODD questions that have an increased focused on cyber
- How are other firms approaching cyber insurance?
- Cybersecurity email standards: how do you treat PDF attachments?
- Security measures for LPs who cannot/will not login to the investor portal
- Use of password-protected or encrypted documents
- Creating cybersecurity best practices and protocols around legacy systems with data in multiple places
- Developing a cybersecurity training program for employees
- Ensuring firm policies are up to par with SEC requirements

Instructors

Simon Eyre, Chief Information Security Officer, **Drawbridge**

Nathan Ford, Senior Vice President, Business Development, **Drawbridge**

Group C

Secondary market: driving growth in fund restructuring

- What does aging funds mean and how many are out there?
- Market metrics and recent developments in the market
- Economic insight on what can be seen in the data
- Providing options for GPs and LPs seeking a way to structure out
- Evaluating the process: timeline of how long these deals are supposed to take
- Due diligence—perspectives on running and facilitating the deals
- What diligence looks like from the funds side of the universe
- Types of information and documents requested
- What changes can fund managers expect with fair value accounting for secondary market transactions?
- Tax and valuation issues to consider

1:00 Networking luncheon

2:05-2:55 Key considerations for addressing diversity, equity and inclusion issues in private equity

- Are DEI initiatives a matter of firm culture?
- How much does LP pressure contribute to DEI policies?
- Does your HR policy provide structure or outline diversity initiatives?
- Tackling post pandemic talent gaps in an inclusive manner
- How can the challenge of lack of diversity at entry and senior levels be solved?
- What impact hiring should look like for PE and your firm
- Changing how your firm approaches recruitment and hiring
- Utilizing recruiters to assist in identifying the right candidates
- Ensuring diverse hires are successful within the firm

Moderator
P. Thao Le, Partner, **Troutman Pepper**
Panelists
Hina Ahmad, Senior Managing Director & Chief Operating Officer, **Capital Dynamics**
Megan Chandler, Director, Global Talent Management, **The Riverside Company**
Katerina Tzouganatos, Principal, **Deloitte**

3:00-3:50 Evolution and normalization of investor reporting

- How has investor reporting evolved over the past 10 years?
- Primary areas of reporting that have changed the most in the last several years
- Best practices for responding to ESG questionnaires and reporting on ESG metrics
- Recent reporting on DEI initiatives
- Handling ILPA templates and increasing side letter requests
- Are ILPA templates used for specific investors or across the board for all investors?
- Exploring different ways to manage data including technology implementation
- What are you doing internally to get to a single point of truth?
- Utilizing portals as the delivery mechanism to LPs
- Will AGMs and diligence meetings remain virtual in the future?
- Are investors requesting returns presented in accordance with GIPS?

Moderator
Sebastien Sacre, COO of Private Capital Fund Services, **Northern Trust**
Panelists
Shannon Dolan, SVP, Asset Management & Private Markets, **FIS**
Ruth E. Horowitz, Vice President, Equity Mobilization Division, **IFC Asset Management Company**
Kristine O'Connor, Managing Director and Chief Financial Officer, **Franklin Park**
Kevin Power, Head of Compliance – Americas, **Pantheon**

3:50 End of conference