Private Equity International

### CFOs & COOS Spring Roundup 2022

March 24 The Westin Times Square New York

# Join interactive discussions with PE & VC CFOs & COOs



To learn more, please visit: privateequityinternational.com/cfo-springroundup/

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# Agenda **highlights**

#### **Opening panel:**

Striking a balance between strategic firm development and managing operations

- » Ensuring firm strategy corresponds with evolving PE trends
- » How the CFO and COO roles continue to impact front office functions
- » Recognizing when to delegate tasks to focus on emerging firm initiatives
- » Tax alert: what is expected in 2022 and how are CFOs involved in the process?
- » Examining what tools CFOs are utilizing to assist with task management
- » Best practices for optimal engagement with portfolio companies

#### View full agenda **②**

#### **Roundtable topics include:**



Sourcing and developing talent in PE



Data management practices



Strengthening operational efficiency



Enhancing cybersecurity protocols



The CFO and COO roles



Investor reporting efforts



ESG integration



Compliance & SEC matters

## **Keynote** speaker

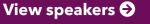


Matthew Harris
Assistant Director,
Co-Head Private Funds Unit
U.S. Securities and
Exchange Commission

**Matthew Harris** is the Assistant Director and Co-Head of the SEC's Private Funds Unit (PFU) within the Division of Examinations the SEC's specialized unit dedicated to examining advisers to private funds. Mr. Harris was previously an Exam Manager in the PFU and the Chicago Regional Office where he joined as a Securities Compliance Examiner in 2002.

Mr. Harris received the Shannon Ayers Examination Award of Excellence in 2016 as part of the PFU for significant contributions to the SEC's efforts to enhance compliance and protect investors. He earned a Bachelor of Arts degree in Economics from Wheaton College and is a CFA® charterholder.

# Hear from **industry veterans**





**Lynn Atkinson**Chief Operating Officer **Mainsail Partners** 



Terry Elizabeth Cheyney Chief Financial Officer Tribeca Venture Partners



Brian Chibwe Chief Financial Officer Clarion Capital Partners



Maha Eltobgy
Chief Sustainability Officer/
Managing Director
Brightstar Capital



Darlene Kari
Director of Human Resources
TA Associates



John Pollard Jr. Global Chief Compliance Officer EJF Capital



Jennifer Randle
EVP of Finance and Operations
TCG



Dan Rochkind CFO Lerer Hippeau



Jason Snider
Chief Financial Officer / Chief
Compliance Officer
Gauge Capital



John Stephens Partner & Chief Financial Officer,US Pomona Capital



Kristy Trieste
Founding Partner,
Chief Financial Officer & Chief
Compliance Officer
Motive Partners



Dino Verardo
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Cristiana Crocco at cristiana.c@peimedia.com or call +1 646 921 0923

### Event **Tickets**

The CFOs & COOs Spring Roundup is part of the CFO All Access membership. Book your ticket and receive in-person admission to the CFOs & COOs Spring Roundup in New York, plus 12-month access to member profiles and all in-person and virtual CFOs & COOs events.

For more information, please contact **Anna Dorokhin** at **anna.d@peimedia.com** 



Great to connect with other CFOs and COOs who are trying to solve the same problems that I am! We had a great networking session on the financing topic at a roundtable. Enjoyed it!

# Book your ticket today **€**

For program information: **Nikki Gale** nikki.g@peimedia.com +1 646 970 3813

For sponsorship opportunities: **Cristiana Crocco** cristiana.c@peimedia.com +1 646 921 0923

For registration questions: **Anna Dorokhin** anna.d@peimedia.com +1 646 356 4512