

Private Equity  
International

# CFOs & COOs Spring Roundup 2022

March 24  
The Westin Times Square New York

## Join interactive discussions with PE & VC CFOs & COOs

**PEI**

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# Contents

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- » [Agenda highlights](#) →
- » [Keynote speaker](#) →
- » [Speakers](#) →
- » [Attendees](#) →
- » [Venue](#) →
- » [Event sponsors](#) →
- » [Event tickets](#) →



# 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](#) ↗

## 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**

[View speakers ↻](#)



**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**  
Chief Operating Officer & Chief  
Financial Officer  
Sageview Capital

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# 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](mailto: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 ↻

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