



Private Funds CFO Network

**Where successful CFOs, COOs and
CCOs connect, learn and grow**

The Private Funds CFO Network is the exclusive hub for the most influential finance, operations and compliance executives working in private markets. The Network is rich in communal knowledge and provides exclusive introductions, intimate peer gatherings around specific topics, and continuing professional education opportunities.

June 2025 Member Meetings Agenda

Strengthen your peer network and learn actionable insights on AI, automation, and data.

Up to 3 CPE credits available.

Boston

June 18; 2:00PM- 6:00 PM
View Boston, 800 Boylston Street
50th Floor

Chicago

June 25; 2:00PM-5:30 PM
110 North Wacker Drive
3rd Floor

Roundtable discussions

The roundtable format of this event consists of three 50-minute small group conversations. The facilitators of each topic will rotate tables so that each table discusses each one of the below topic areas.

Topic Areas

Topic 1:

Automating the Finance Function: From Back Office to Strategic Partner

Network Director
Chris Tamms
chris.t@pei.group

For Sponsorship
opportunities:
Joshua Stoller
joshua.s@pei.group

To join the Network:
Anna Dorokhin
anna.d@pei.group

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PEI

**Where successful CFOs, COOs and
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- Optimizing financial reporting, forecasting, and compliance with automation and/or AI
- Streamlining fund operations and improving efficiency
- Automation and/or AI tools for risk management and fraud detection

Topic 2:

AI & Automation for Portfolio Insights and Performance Monitoring

- AI-driven portfolio monitoring and performance benchmarking
- Streamlining valuation and reporting processes
- The role of automation in LP reporting and transparency

Topic 3:

Smarter Finance: Empowering Non-Tech Teams with Data, Automation & AI

- Building data-fluent, automation and/or AI-aware finance teams
- Identifying practical tools to streamline operations and enhance decision-making
- Navigating adoption hurdles and showing measurable impact

Agenda

2:00 – 2:30 PM | Registration & Welcome

2:30 – 3:20 PM | First Discussion

3:20 – 4:10 PM | Second Discussion

4:10 – 5:00 PM | Third Discussion

5:00 – 6:00 PM | Networking Drinks (Boston)

5:00 – 5:30 PM | Networking Drinks (Chicago)

**Up to three CPE credits will be available for the category of Information Technology*

June 18 Boston table facilitators

Topic 1:

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Michael Benezra, Managing Partner & Founder, **Erez Capital**

Tina St. Pierre, Partner, Chief Operating Officer, Secondaries, **Ares Management**

Topic 2:

Adam Bruce, Partner & CFO, **Flare Capital**

Nina Baryski, Managing Director, Funds CFO, **Benefit Street Partners**

Topic 3:

Sarath Akkineni, Director, Front Office Technology & Innovation & Global Production
Support, **Advent International**

Zack Waldman, Venture Partner, **Erez Capital**

Sponsor speakers:

Adam Devine, Co-Founder and CRO, **Foresight Data**

Jason Miller, Co-Founder and CEO, **Foresight Data**

Sponsors (Boston):

foresight

June 25 Chicago table facilitators

Topic 1:

Shanna Otto, COO, CCO, Partner, **Pritzker Alternative Strategies**

Adrienne Vandarsall, CFO, **RC Capital**

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Sponsor speaker:

Jeroen van der Wal, CEO, **Noticehub**

Sponsors (Chicago):



Topic 2:

Lauren Burley, SVP, IT Solutions, **Thoma Bravo**

Todd Schneider, CFO & CCO, **The Copia Group**

Topic 3:

Chaim Langer, Managing Director, **Goldman Sachs**

Ben Epstein, Controller, **Norwest Equity Partners**

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