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.

July 2025

Member only Virtual Quarterly Markets Update

Date: 24 July, 11:30 am –12;30 pm EST
Format: Virtual presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.
A one-hour informal conversation led by Adam Smallman and Dan Rodriguez with quarterly data and talking points from Editors. Virtual meeting is live and recorded and available for sharing afterwards.

Next-Gen NAV Financing: Solutions for Liquidity, Growth & Portfolio Resilience

Date: 29 July
Format: Virtual, interactive panel discussion, 1 CPE/CPD credit

- Explore how private credit firms are leveraging innovative NAV-based credit facilities to enhance fund-level liquidity, extend runway, and optimize capital deployment.
- Case study: Hear a real-world example of how a customized NAV solution unlocked capital at the portfolio level and supported both GP and LP strategic goals.
- Learn how bespoke structures are evolving to meet the diverse needs, fund profiles, and investor requirements.

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August 2025

Secondaries Update

Date: 8 August
Format: Virtual, on-the-record Q&A, 1 CPE/CPD credit

- **Strategic Use of Secondaries for Portfolio Management**: How CFOs/COOs can leverage secondaries (LP-led and GP-led) to manage liquidity, rebalance exposures, and support fundraising efforts.
- **Operational Considerations in GP-Led Transactions**: A look at the executional complexity of continuation funds, including data preparation, process management, and coordinating fairness opinions and third-party advisors.
- **Valuation and Reporting Challenges**: Best practices for secondaries-related valuation, NAV setting, and ensuring consistency across audit, tax, and LP reporting.

Mid-market update: What's next for the US and UK?

Date: 15 August
Format: Virtual, on-the-record interactive panel discussion and Q&A, 1 CPE/CPD credit

- Understand the market now – have firms consolidated? Have firms re-located due to tax laws?
- Discuss what might be coming for the US and UK markets regarding deal volume, exits, fundraising, etc.
- Learn more about what political implications have and will effect the landscape.
- Discuss some of the other trends happening in the US and UK (GP stakes, etc.).

September 2025

Venture Circle: US and UK Quarterly Update

Date: 12 September
Format: Virtual, on-the-record Q&A, 1 CPE/CPD credit

- Discuss an overview of the state of the venture market trending themes in venture this year.
- Understand trends in fund formations.
- Discuss regulatory and tax updates impacting the US and UK.

Let's talk about the wealth channel

Date: 19 September
Format: Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- **Structuring for Access**: What fund structures (e.g., evergreen funds, feeder vehicles, interval funds) are most suitable for accessing high-net-worth (HNW) and mass affluent investors via the wealth channel?

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- **Operational Readiness**: What are the operational and compliance challenges of onboarding and servicing retail/HNW investors, particularly around reporting, liquidity management, and suitability?
- **Platform & Distribution Partnerships**: How are firms leveraging relationships with wirehouses, RIAs, and private banks to reach the wealth channel—and what are the economics and control trade-offs?
- **Education & Transparency Needs**: How do investor expectations differ in the wealth channel versus institutional LPs, and what role do CFO/COO teams play in supporting educational efforts and disclosure standards?

AI Case Study: Hear from a CFO and an AI Provider

Date: 24 September

Format: Virtual, on-the-record interactive session, 1 CPE/CPD credit

- Learn about the RFP process.
- Discuss why the CFO/COO choose that particular AI tool.
- Understand how the relationship is now between firm and service provider.
- Learn about how the AI tool delivered outcomes for the firm.

October 2025

Date: October TBD

Format: In-person interactive roundtable discussion and networking event

Join fellow members for an event of guided discussion and opportunities to connect.

A discussion on Fund Structuring and Tax Optimization

Date: 15 October

Format: Virtual, on-the-record interactive session, 1 CPE/CPD credit

- Tax-efficient structuring for U.S. vs. non-U.S. investors
- Use of blocker corporations, hybrid entities, and treaty planning
- Impact of tax reforms on fund structuring choices

Executive Coaching Series: Changing Your Brand and Perceptions of You Over Time

Date: 21 October

Format: Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Learn how to develop your reputation outside your organization, including how to be thought of as a competent professional who cares about other's success. In this session, we will:

- Discuss common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as

- Intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team.
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list.
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance.
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation.

Executive Coaching Series: How to Lead When You Aren't the Expert in the Room

Date: 23 October

Format: Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Learn how leaders can add value in team meetings, even when the topic isn't their expertise. In this session, we will:

- Uncover the fears and beliefs managers have that lead to imposter syndrome, which often limits their questions and comments.
- Discuss leader gravitas and its impact on energy and contributions of the team during meetings.
- Apply principles of leadership coaching in meetings when you aren't in charge, nor are the expert, to foster strategic group discussions and gain the respect of the room.

Executive Coaching Series: Working with and Managing Different Personalities

Date: 28 October

Format: Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will:

- Breakdown the four categories by: imaginative talkers, detail workers, decision makers, peacekeepers, and additional combinations of work context personality.
- Discuss which work personality causes finance professionals the most challenges.
- Unpack hot buttons and motivational drivers for each category.

Member only Virtual Quarterly Markets Update

Date: 30 October, 11:30 am – 12:30 pm EST

Format: Virtual presentation

PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.
A one-hour informal conversation led by Adam Smallman and Dan Rodriguez with quarterly data and talking points from Editors. Virtual meeting is live and recorded and available for sharing afterwards.

Let's Talk Co-Invest Structures

Date: 31 October
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE/CPD credit

- Learn more about the last trends in co-investment structures.
- Discuss what venture firms should take into consideration before launching a coinvest structure.
- Understand the benefits and potential drawbacks of these structures.

November 2025

The CFO's Role with Investor Relations

Date: 4 November
Format: Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit

- Learn how to contribute to the right commercial motions to sell your firm/fund narrative.
- Understand how to segment the market by "customer," determining potential commitment levels, and devising targeted strategies to win share of wallet. Do you know how much capital will come from your existing LPs for the next raise and how you'll fill the gap?
  - Discuss how you're determining your re-up rate and surrounding plans. How many new LPs do you need. Is your team right-sized to succeed?
- Is there clarity on where senior firm leadership time is best spent?
  - Should you pressure test your revised narrative to see how it's resonating with LPs?

Women's Circle: Moving from CFO to Partner

Date: 7 November
Format: Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit
Join fellow women in the Network to discuss:

- Discuss how to validate your worth at the firm.
- Understand how others navigated their path from CFO to Partner.
- Discuss the leadership traits needed to move beyond CFO.

Growth Circle: How to Stand Out in the Growth Market

Date: 24 November
Format: Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit

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Join fellow Growth Circle members to discuss:

- Discuss factors that are driving the rise of growth equity.
- Learn how firms can stand out in order to win deals.
- Discuss how firms can use the power of technology to their advantage.

December 2025

Case Study on Data Management

Date: 2 December

Format: Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- Learn the initial issues the firm was having with data. What problems were they looking to solve?
- Discuss why the firm choose certain data management platforms? How are those platforms helping?
- Understand how you can keep your data secure.
- Discuss the workflow processes of your data. What does that allow you to leverage?

Banking and Macro Economy Update: The Market in 2026

Date: 9 December

Format: Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- Have exits finally come back to a somewhat normal pace – what is happening out there in the market?
- How are the options for accessing credit lines? What are the current liquidity trends.
- What are CFOs doing differently now that they were not doing early in the year?
- What do we think 2026 will bring?

Please note that these events are subject to change

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