Private Funds CFO Network

PEI

New York Forum

Setting the standard for finance and operations in private markets

Michael S. Chae
Vice Chairman & CFO
Blackstone

Catherine Addona-Peña
CRO & SVP
Nasdaq

Vik Sawhney
CAO
Blackstone

Connect with the **most influential finance and operations decision-makers in private markets** in New York City this February 4-5.

You will leave with:

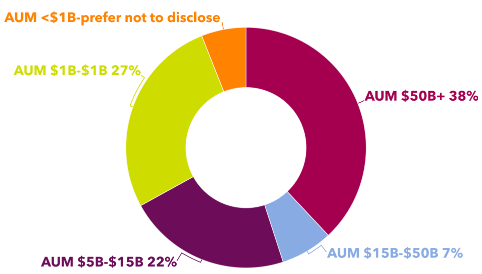
- A future-facing playbook for adapting to regulatory changes
- Advice on leveraging strategic opportunities in a rapidly evolving environment
- A deeper understanding of key risk considerations when adopting AI
- A view into the emerging risks and challenges facing firms in 2025

Discover the Private Funds CFO Network

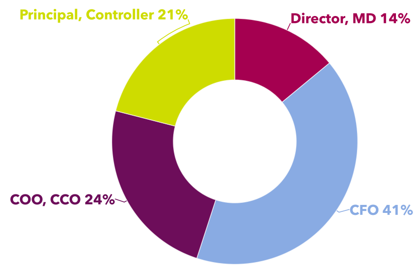
Connect with a carefully curated network of top CFOs, COOs, CCOs and other private equity decision-makers from leading firms.

Who attends our events?

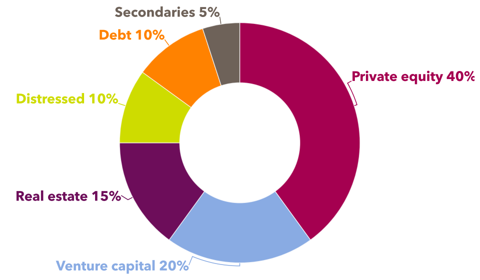
MEMBERS BY AUM



NETWORK BY ROLE



OUR MEMBERS INVEST IN



Start your Network experience at the New York Forum:

» Discuss specific topics in closed-door think tanks, exclusively for GPs
» Expand your professional network during networking meals and a cocktail reception
» Receive personalized introductions and a schedule tailored to your most pressing concerns

Drive success at your firm with practical guidance from top finance & operations leaders:

Noah Becker
CFO
LLR Partners

Matthew Breitfelder
Partner, Global Head of Human Capital
Apollo

Norm Champ
Former Director of the Division of Investment Management
U.S. Securities and Exchange Commission

Jill Lampert
CFO & CAO
NPG Energy Capital Management

Chaim Langer
COO, Vintage Funds
Goldman Sachs Asset Management

Michael Lebowitz
Head of Investments Compensation
Manulife Investment Management

Sarah G. Roth
CEO
Argosy Capital

Ruchir Swarup
Partner, CIO
KKR

View the full agenda

PEI

Private Funds CFO New York Forum 2025 Agenda

February 4-5, 2025

Confirmed speakers include:

Keynotes:

- Michael S. Chae, Vice Chairman & CFO, Blackstone
- Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions, Blackstone
- Catherine Adonna Pena, Chief Risk Officer, Nasdaq

Speakers:

- Tracey Abbott, CEO, T. Abbott Enterprises
- Ore Adegbotolu, Head of Business Development; U.S., Aztec Group
- Carly Altieri, Principal, Victory Park Capital
- William Andreoni, National Asset Management Consulting Leader | Fund Services + Co-Lead, RSM US, LLP
- Dan Bagniski, CFO/CCO, Citation Capital
- Jennifer Banzaca, Senior Reporter - Private Funds CFO, PEI
- Joann Barsky, Chief Financial Officer & Head of Operations, Townhall Ventures
- Noah Becker, Chief Financial Officer, LLR Partners
- Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners
- Graham Bippart, Senior Editor, Buyouts and Private Funds CFO, PEI
- Kevin Blake, Chief Executive Officer, TechMD
- Jeff Bohl, Chief Operating Officer, Ontra
- Matthew Breitfelder, Partner and Global Head of Human Capital, Apollo Global Management
- Justin Brimfield, Managing Director, ICD, a Tradeweb business
- Steve Bullock, Head of Financial Services, Kyriba
- John Cannaverde, Fund Controller, Portfolio Advisors
- Sheenam Chadha, Chief Financial Officer, Sandbrook Capital
- Aaron Chan, Chief Financial Officer, Enlightened Hospitality Investments
- Norm Champ, Former Director of the Division of Investment Management, U.S. Securities and Exchange Commission
- Alan Chen, Chief Compliance Officer and Associate Counsel, IPI
- Karishma Chaudhary, CFO, X10 Capital Management
- Joshua Cherry-Seto, Partner, CFO, StartUp Health
- Ommer Chohan, Chief Financial Officer, Atlas Venture
- Dina Colombo, Partner, COO & CFO, GreyLion Partners

- Travis DeForge, Director of Cybersecurity Engineering, Abacus Group
- Jamison Davis, Chief Financial Officer, Bow River Capital
- Melissa Dickerson, Managing Director, Operations & CFO, Genstar Capital
- Lisa Dobrinsky, Vice President, Two Sigma
- Dominic Elias, Chief Advisory Services Officer, EWM Global
- Chalene Ellis, Sr. Executive Director, Head of Fund Services – North America, CSC Global
- Simon Eyre, CISO, Drawbridge
- Deborah Fields, Partner-Tax, KPMG
- Cesar Estrada, SVP, Private Markets SegmentHead, Arceisum
- Mark Feirman, CFO and Partner, Cross Rapids Capital LP
- Eric Feldman, Chief Information Officer, The Riverside Company
- Alexandria Fisk, Chief Operating Officer, Casdin Capital
- Bethany Foullois, Partner & Chief Operating Officer, TAVO
- Jon Franke, Partner, Rubicon Technology Partners
- Fang Fang Fu, CFO, Turnspire, Capital Partners
- Jeffrey Gilbert, Chief Operating Officer & Chief Legal Officer, Carnelian Energy Capital
- Joshua Gilbert, CFO Outsource Consultant
- Michaele Gobel, CFO, Equilibrium Capital
- Katherine Gomer, COO & Managing Director, Maverick Ventures
- Dan Gorlick, Head of Product, iLEVEL, S&P Global Market Intelligence
- Brian Hanify, Chief Revenue Officer, TechMD
- Omar Hassan, Partner, CFO, Cloverlay
- Maryna Higgins, Director of Finance, Quona
- Sadik Jakupaj, Partner & COO, Morgan Stanley
- Mike Janiszewski, Chief Operating Officer, Alter Domus
- Jason Kaslow, Chief Financial & Chief Compliance Officer, Tiger Infrastructure Partners
- Aileen Keaney, CFO, Ethos Capital
- Pete Keenan, Vice President of Finance, 645 Ventures
- LeAnn Kilarski, Chief Operating Officer, Entrepreneurial Equity Partners
- Sandi Kim-Suk , Chief Financial Officer, Cortland
- Jesse Knapel, CFO & CCO, Prelude Growth Partners
- Arthy Kumar, Industry Principal, Workiva
- Denis Laloy, CFO, Factorial Funds
- Jill Lampert, Chief Financial & Administrative Officer, NPG Energy Capital Management
- Paul Landi, Senior Solutions Consultant, FIS Captial Markets
- Chaim Langer, Managing Director, Goldman Sachs
- Mona Laungani, Managing Director & Chief Financial Officer, J.C. Flowers
- Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors

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- Chase LeBlanc, Director, Specialty Sales, FactSet
- Michael Lebowitz, Head of Investments Compensation, Manulife Investment Management
- Danilsa Lopez, Partner, Audit Services, Grant Thornton
- Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer, FalconPoint Capital Partners LLC
- Alice Mann, Founder and Managing Partner, Mann Partners
- Gary Marshall, Director of Technology, Paine Schwartz Partners
- Shant Mardirossian, Partner & Chief Operating Officer, Kohlberg & Company, LLC
- Jennifer Martin, General Partner & Chief Financial Officer, Welsh, Carson, Anderson & Stowe
- Mike Martinez, Chief Operating Officer & General Counsel, Pinebrook Partners
- Carrie McIntyre, CEO & Partner, Viridis Fund Solutions
- Karen McMonagle, Chief Financial Officer, Corsair Capital
- Amanda Misch, SVP, Compliance & Legal, Trilantic North America
- Steve Mlynar, Senior Managing Director, CFO, Stonepeak
- Melissa Mounce Mithal, PE Insider, Advisor & Board Director, Right Arm Advisors
- Matthew Norris, Senior Partner, Chief Financial Officer & Chief Compliance Officer, The Edgewater Funds
- Patty Nykodym, Chief Financial/Chief Compliance Officer, FFL Partners
- Deirdre O'Connor, Chief Financial Officer and Senior Managing Director, Cerberus Capital Management
- Michael Pantanella, National Managing Principal, Asset Management Industry, Grant Thornton
- Brad Pietras, Director of Finance, Level Equity
- Tracy Pizzi, Partner, Yellow Wood Partners
- John Polis, Chief Operating Officer & Chief Technology Officer, Star Mountain Capital
- Sunil Rao, COO & SVP, Finance, Plum Alley
- Berat Riftai, Chief Financial Officer & Chief Compliance Officer, Heartwood Partners
- Sarah Roth, CEO, Argosy Capital
- Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen2
- Bela Schwartz, Chief Financial Officer, The Riverside Company
- Aaron Simkovich, Managing Director & Chief Financial Officer, Maranon Capital, L.P.
- Steve Sims, Chief Operating Officer and Chief Compliance Officer, Braemont Capital
- Vishal Shah, Chief Product Officer, TresVista
- Judd Sher, Partner & Chief Financial Officer, Hellman & Friedman
- Ruchir Swarup, Partner, Chief Information Officer, KKR
- Chris Tamms, Head of Private Funds CFO Network, PEI
- Sarah Tomolonius, Partner, Head of Investor Relations, M13
- Katie Twomey, Senior Vice President & Chief Compliance Officer, Illumen Capital
- Raymond Updyke, VP of Operations & Finance, Alpaca VC
- Sarah Verkest, Managing Director-Global Head of Tax, KKR
- Henry Ward, CEO & Co-Founder, Carta
- Joel Wattenbarger, Partner, Ropes & Gray

- Matt Whelan, Partner & Chief Financial Officer, Patient Square Capital
- Irene Willard, CFO & CCO, Dunes Point Capital
- Mike Witkowski, CFO and Partner, Primary Venture Partners
- Christopher Wolf, CFO, MPM BioImpact
- Kyle Wool, Chief Financial Officer, Energy Impact Partners
- Caroline Young, Founder, Craftsbury Consulting

Day 1 February 4

8:00-9:00 **Registration – breakfast**

9:00-9:10 **PEI welcome**

Chris Tamms, Head of Private Funds CFO Network, PEI

9:10-9:15 **Chair's welcome**

Noah Becker, Chief Financial Officer, LLR Partners

9:15-10:05 **Keynote interview: Michael S. Chae, Vice Chairman & CFO, Blackstone & Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions, Blackstone**

We are honored to welcome Blackstone's Michael S. Chae, Chief Financial Officer and Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions for a keynote interview.

In this pivotal session, Michael and Vik will delve into the current economic landscape, providing a comprehensive analysis tailored for today's CFOs, COOs and senior finance executives.

Drawing from his extensive experience leading one of the world's largest and most influential investment firms, Michael will share his perspectives on navigating financial complexities, adapting to regulatory changes, and leveraging strategic opportunities in a rapidly evolving environment. Attendees will gain valuable insights into the key challenges and emerging trends shaping the financial industry, equipping them with the knowledge to steer their organizations with confidence and foresight.

10:05-10:55 **Data Debrief: Trends Driving Focused Forecasting, Benchmarking Breakthroughs - and What They Mean for the Future of Private Funds**

Reviewing in-depth people, planning and process data from PEI Group's 2025 Private Funds Annual CFO Insights Survey, our panel of industry leading executive panelists will breakdown how this essential research can and should shape the future of your firm, inform your strategies – and rewrite the landscape of private funds as we now know it.

Moderator: Jennifer Banzaca, Senior Reporter - Private Funds CFO, PEI
Speaker: Sarah Roth, CEO, Argosy Capital

Speaker: William Andreoni, National Asset Management Consulting Leader I Fund Services & Co-Lead, RSM US LLP

Speaker: Melissa Dickerson, Managing Director & CFO, Genstar Capital

Speaker: Judd Sher, Partner & Chief Financial Officer, Hellman & Friedman

10:55-11:25 **Networking break**

11:25-12:25 **State of the industry fireside chats**

Three-part series of 20-minute informal interview-style sessions highlighting representatives from top firms and will provide attendees with advice for weathering through an evolving industry.

Part 1 | Understanding where the regulatory environment is heading

Join us for an insightful discussion with Norm Champ the former Director of the Division of Investment Management at the U.S. Securities and Exchange Commission (SEC). In this exclusive interview, we will delve into how investment firms can stay ahead of regulatory changes and build robust compliance programs.

Key Topics Include:

- *Anticipating SEC Developments: Gain expert insights on emerging trends and potential regulatory shifts from the SEC. Discover strategies for firms to proactively adapt to new rules and expectations, ensuring they remain compliant and competitive in a dynamic regulatory environment.*
- *Building a Successful Compliance Program: Learn about the essential components of a strong compliance program. Explore best practices for designing and implementing effective compliance frameworks that not only meet regulatory requirements but also foster a culture of integrity and accountability.*

Speaker:

Norm Champ, Former Director of the Division of Investment Management, U.S. Securities and Exchange Commission

Moderator: Henry Ward, CEO & Co-Founder, Carta

Part 2| Driving Success Through Human Capital: Strategies for the Private Funds Industry

This interview will offer a rare opportunity to hear directly from one of the leading voices in human capital strategy and gain practical insights that can help shape the future of talent management in private funds. Whether you're looking to build a more inclusive culture, adopt data-driven practices, or improve your firm's talent retention, this conversation will provide actionable takeaways to help your firm excel in the competitive private funds sector.

Key Topics Include:

- *Current Trends in Recruitment and Retention*
- *Building an Innovative and Inclusive High-Performance Culture*
- *Leveraging Data-Driven Approaches to Human Capital*

Speaker:

Matthew Breitfelder, Partner and Global Head of Human Capital, Apollo Global Management

Moderator: Henry Ward, CEO & Co-Founder, Carta

Part 3 | Leveraging Technology for Efficiency and Risk Mitigation in Private Funds

Ruchir will delve into KKR's technology vision, discussing how the integration of data analytics, artificial intelligence, and digital tools is reshaping the private equity landscape.

He will also offer a forward-looking perspective on how private funds can leverage technology to streamline operations, drive efficiencies, and minimize risk.

Speaker:
Ruchir Swarup, Partner, Chief Information Officer, KKR
Moderator: Henry Ward, CEO & Co-Founder, Carta

12:25-1:25 **Networking luncheon**

1:30-2:30

Breakout panels with peer-to-peer workshops

Ever wish you could delve into a panel's discussion topics with your peers – or the panelists themselves – while they're still at the top of your mind and the tip of your tongue? In these uber-interactive breakout sessions, you get to do both!

HOW IT WORKS: Choose from 5 different deep dive topic options for a dynamic panel discussion on stage, followed by panelist-led small group brainstorms and breakdowns of panel subtopics.

These interactive sessions end with the panelists reporting back to the larger audience so everyone may benefit from the knowledge shared amongst the smaller groups during their peer-to-peer workshops

Track A | Power Prep: Exploring New Tactics for Present Day SEC Exams| Peer-to-Peer Compliance Workshop

- SEC priorities are constantly changing year to year - are you keeping up? We'll unpack the 2025 exam's most pressing priorities
- An audit can happen anytime and constant, diligent prep is key - learn how to decipher which best practices ensure your firm's exam readiness - at *all* times
- The keys to navigating reoccurring exam themes of recent years

Moderator: Joel Wattenbarger, Partner, Ropes & Gray
Speaker: Jon Franke, Partner, Rubicon Technology Partners
Speaker: Amanda Misch, SVP, Compliance & Legal, Trilantic North America
Speaker: Mona Laungani, Managing Director & Chief Financial Officer, J.C. Flowers
Speaker: Jeff Bohl, Chief Operating Officer, Ontra

Track B | Beyond the Buzz: Tailoring your Tech Stack for Agility, Velocity, and True Value| Peer-to-Peer Tech Stack Workshop

- Trial and error: when is it the right time to investigate new vendors and solutions?
- What tech solutions are firms turning to as workloads increase with limited resources?
- Determining key considerations for costs, risks and characteristics of providers to quickly (but safely) find your firm's footing in a rapidly evolving market

Moderator: Ore Adegbotolu, Head of Business Development; U.S., Aztec Group
Speaker: Matthew Norris, Senior Partner, Chief Financial Officer & Chief Compliance Officer, The Edgewater Funds
Speaker: John Polis, Chief Operating Officer & Chief Technology Officer, Star Mountain Capital
Speaker: Matt Whelan, Partner & Chief Financial Officer, Patient Square Capital
Speaker: Chase LeBlanc, Director, Specialty Sales, FactSet

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Track C | Data Driven, Future Facing: Keeping up with the Accelerated Evolution of Firmwide Data Management| Peer-to-Peer Data Management Workshop

- New approaches to developing data repositories, collecting diverse, accurate, timely data across your firm, and ensuring the value of collected data
- Exploring new, non-traditional uses for precise, informed data-driven decisions across your firm
- How to better take advantage of AI's increasingly significant role in data management

Moderator: Justin Brimfield, Managing Director, ICD, a Tradeweb business
Speaker: Joann Barsky, Chief Financial Officer & Head of Operations, Townhall Ventures
Speaker: Dina Colombo, Partner, COO & CFO, GreyLion Partners
Speaker: Brad Pietras, Director of Finance, Level Equity
Speaker: Cesar Estrada, SVP, Private Markets Segment Head, Arcesium

Track D | Bigger, Bolder, Better!: Scaling your firm as Private Markets Evolve| Peer-to-Peer Scaling Workshop

- How does scaling differ between asset classes - and what operational strategies can be learned and applied from those outside your class?
- How does a firm balance resourcing and staffing to solve immediate needs while having a strategic mindset for future growth?
- Investor inquires: what do new and existing investors want to see from firms as they scale?

Moderator: Joshua Cherry-Seto, Partner, CFO, StartUp Health
Speaker: Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors
Speaker: Sandi Kim-Suk , Chief Financial Officer, Cortland
Speaker: Mike Janiszewski, Chief Operating Officer, Alter Domus
Speaker: Dan Bagniski, CFO/CCO, Citation Capital

Track E | Carried Interest 2025: Building credible & creative carried interest programs for the Now & Next Generations | Peer-to-Peer Carried Interest Workshop

- How to find the right vesting structure and allocation methods for your firm
- Deciphering the best time to make changes to an existing carry program
- What are millennials & gen-z expecting from carry & how does it differ from other generations at your firm?

Moderator: Dominic Elias, Chief Advisory Services Officer, EWM Global

Speaker: Berat Riftai, Chief Financial Officer & Chief Compliance Officer, Heartwood Partners
Speaker: Lisa Dobrinsky, Vice President Two Sigma
Speaker: LeAnn Kilarski, Chief Operating Officer, Entrepreneurial Equity Partners
Speaker: Michael Lebowitz, Head of Investments Compensation, Manulife Investment Management

2:35-3:25

Facing the Future: Now, New, Next Panel Discussions

Choose from 4 top of mind topic options, as diverse groupings of the brightest minds in the business openly discuss their journeys, pitfalls, and victories while designing the essential blueprint for their firm's future – and the lessons they've learned along the way. Forget the crystal ball – this is an IRL look at what's to come.

Interactive audience Q&A throughout.

Track A | Collaborations that Click: Aligning with Portfolio Companies though Values & Future-Facing Vision

- How to define and strengthen your role as a CFO and COO in portfolio collaborations
- Establishing proper KPIs and performance metrics for a diverse set of portfolio companies
- Determining the best solutions and tech tools for the crucial exchange of data with portfolio companies

Moderator: Dan Gorlick, Head of Product, iLEVEL, S&P Global Market Intelligence
Speaker: Tracy Pizzi, Partner, Yellow Wood Partners
Speaker: Katherine Gomer, COO & Managing Director, Maverick Ventures
Speaker: Steve Bullock, Head of Financial Services, Kyriba
Speaker: Sunil Rao, COO, SVP, Finance, Plum Alley

TRACK B | War Games: Battling & Beating the Cybersecurity Risks of the Now & Future

- Exploring new ways of ensuring all firm employees are fully prepared for the latest risks & forecasted future of cyber-invasions
- Learn how varied sizes of firms are firms handling off-channel communications
- Portfolio company cyber protection & fully unpacking the GP's fiduciary duty in 2025 and beyond

Moderator: Travis DeForge, Director of Cybersecurity Engineering, Abacus Group
Speaker: Gary Marshall, Director of Technology, Paine Schwartz Partners
Speaker: Joshua Gilbert, CFO Outsource Consultant
Speaker: Eric Feldman, Chief Information Officer, The Riverside Company
Speaker: Simon Eyre, CISO, Drawbridge

Track C | Bots, Buzz & the Brave New world: How AI is Transforming the Now & Future of Private Funds (and what a CFO can actually do with it)***

- Getting started with current AI tools for risk assessment, processing financial data/valuation models, as well as investment discovery & deal sourcing
- Will AI be used to optimize investment portfolios based on current market conditions?
- How AI will be increasingly used to automate compliance processes - and what your firm can do to quickly adapt

Moderator: Michael Patanella, National Managing Principal, Asset Management Industry, Grant Thornton Advisors LLC
Speaker: Jill Lampert, Chief Financial & Administrative Officer, NPG Energy Capital Management
Speaker: Steve Sims, Chief Operating Officer and Chief Compliance Officer, Braemont Capital
Speaker: Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen2

Track D | Getting Global: Navigating New & Next Geographical Markets, Domiciles & the Foreign Waters of the Future

- The ins & outs of working with multinational providers & banks, cross-border fundraising tactics & regulatory impact when working in different domiciles
- How firms are communicating their product offerings for LPS & Assessing client needs as client bases are diversifying
- Weighing the risks, rewards and team preparation needed for potential pain points when venturing into the international market

Moderator: Evelyn Pellicone, Chief Financial Officer, Crestview Partners
Speaker: Steve Mlynar, Senior Managing Director, CFO, Stonepeak
Speaker: Karen McMonagle, Chief Financial Officer, Corsair Capital
Speaker: Omar Hassan, Partner, CFO, Cloverlay

3:25-3:50 **Networking break**

3:55-4:45 **Executive Engagement Collaboratives**

These GP-Only deep dive, closed door think tank discussions will be led by two subject matter experts from 2 different sides of the industry and interwoven with group exercise or collaborative problem solving as it pertains to the session topic. These unique breakout sessions are an incredible opportunity for truly transparent talks and takeaways you won't want to miss.

EEC A | Total Tax Deep-Dive: Navigating the Tax Trials, Tribulations & Effects of the 2024 Presidential Election

- The Tax Impact of the 2024 Election
- Tax Planning Highlights- GP Concerns

Facilitator: Deborah Fields, Partner-Tax, KPMG
Facilitator: Sara Verkest, Managing Director-Global Head of Tax, KKR

EEC B| CFOverload: Successfully Managing Today's Compliance Workload

- How are you keeping your financial records in place - Are there different needs to meet compliance protocols?
- At varied firms' stages and AUM parameters, what are you most concerned with?
- Managing & Preparing for the Future of the dual hatted CFO/CCO

Facilitator: Fang Fang Fu, CFO, Turnspire Capital Partners

EEC C | The Ins & Outs of Mastering Modern-Day Investor Reporting

- Understanding LP reporting expectations & aligning current reporting timelines with regulatory pressures
- What do varied types of investors expect? (i.e., institutional investor, individual investor, etc.)
- Facing requests for additional information outside of reports

Facilitator: Jeffrey Gilbert, Chief Operating Officer & Chief Legal Officer, Carnelian Energy Capital

EEC D | Staying Ahead: Exploring New Methods of Management for the CFO

- How to better organize your firm's management fees and expenses
- Where firms are currently allocating cash & and how to budget efficiently to keep the firm afloat
- Get the download on the benefits of various fund types as a manager

Facilitator: Chalene Ellis, Sr. Executive Director, Head of Fund Services - North America, CSC Global

Facilitator: Mark Feirman, CFO and Partner, Cross Rapids Capital LP
Facilitator: Aileen Keaney, CFO, Ethos Capital

EEC E| Leveraging Technology Services to Drive Value

Facilitator: Eric Dirst, Chief Technology Advisor, Align Capital Partners
Facilitator: Kevin Blake, Chief Executive Officer, TechMD
Facilitator: Brian Hanify, Chief Revenue Officer, TechMD

4:50-5:40 **Vendor Voices: Adaptation, Agility & The Current Landscape of Private Funds**

This in-depth panel discussion will bring together a diverse group of experts hailing from the industry's most innovative solution providers to share their unique insights & viewpoints on the state of Private Funds in 2025 - and far beyond. Join us for a frank, lively, future-facing panel discussion amongst those at the forefront of transformation, change and the rapid evolution taking place in the industry right now. Interactive audience Q&A to follow.

Moderator: Jennifer Banzaca, Senior Reporter - Private Funds CFO, PEI
Speaker: Danilsa Lopez, Partner, Audit Service, Grant Thronton
Speaker: Carrie McIntyre, CEO & Partner, Viridis Fund Solutions
Speaker: Arthy Kumar, Industry Principal, Workiva
Speaker: Paul Landi, Senior Solutions Consultant, FIS Captial Markets

5:40-5:45 **Closing remarks -** Noah Becker, Chief Financial Officer, LLR Partners

5:45 **Cocktail reception and end of day one**

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Day 2 February 5

8:00-9:30 **Breakfast**

8:15-8:55 **Private Funds CFO Network Membership Circle Breakfasts (Network members only)**

Delegates will enjoy breakfast at breakout sessions based on membership circle involvement.

Women	Venture Capital	Emerging Managers	Secondaries
Facilitator: Karishma Chaudhary, CFO, X10 Capital Management	**Facilitator:** Sunil Rao, COO, SVP, Finance, Plum Alley	**Facilitator:** Jesse Knapel, CFO & CCO, Prelude Growth Partners	**Facilitator:** Chaim Langer, Managing Director, Goldman Sachs
Facilitator: Sheenam Chadha, Chief Financial Officer, Sandbrook Capital	**Facilitator:** Raymond Updyke, VP, Operations & Finance, Alpaca VC	**Facilitator:** Bethany Foullois, Partner & Chief Operating Officer, TAVO	**Facilitator:** Sadik Jakupaj, Partner & COO, Morgan Stanley

9:00-9:50 **Invite-only think tanks**

Delegates will have the opportunity to break into think tank sessions by job function to discuss what is keeping them up and night and to share best practices for addressing those problems. Designed to facilitate candid discussion, the closed-door session for senior finance and operations professionals will top of mind issues and challenges impacting their firms today.

CFO & COO Think Tank for Emerging Funds (GP only)	CFO & COO Think Tank for Established Funds (GP only)	Senior Finance & Operations Executive Think Tank (GP only)

Facilitator: Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer, FalconPoint Capital Partners LLC

Facilitator: Katie Twomey, Senior Vice President & Chief Compliance Officer, Illumen

Facilitator: Irene Willard, CFO & CCO, Dunes Point Capital

Facilitator: Jamison Davis, Chief Financial Officer, Bow River Capital

Facilitator: Patty Nykodym, Chief Financial/Chief Compliance Officer, FFL Partners

10:00-10:05 **Chair's opening remarks**

Noah Becker, Chief Financial Officer, LLR Partners

10:05-10:50 **Keynote interview**

Fireside Chat with Catherine Addona-Peña, SVP and Chief Risk Officer, Nasdaq

This in-depth Keynote Fireside Chat will explore the increasingly omnipresent role of risk management in today's operating environment - you'll walk away with a deeper understanding of key risk considerations when operationalizing and integrating artificial intelligence platforms, a view into the emerging risks and challenges facing operators in 2025, and how to continually promote a proactive culture of risk management across your organization.

KEYNOTE: Catherine Addona Pena, SVP & Chief Risk Officer, Nasdaq

MODERATOR: Graham Bippart, Senior Editor, Buyouts and Private Funds CFO, PEI

10:50-11:20 **Networking break**

11:20-12:05 **Professional Development Workshops**

These sessions are designed to provide insights and tips for individual success in their roles and how to best support their firms.

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Track A | Leveling Up: Leveraging the Power of Leadership

- Defining leadership and what it means to be a leader in today's working world
- Understanding where and when to voice your opinions
- Team building & striking a balance between creating independent and collaborative team members

Facilitator: Alice Mann, Founder and Managing Partner, Mann Partners

Track B | Leadership in Complex, Risk-Filled Environments

- Adapting leadership styles to manage uncertainty
- How effective leaders turn risk into results
- Leadership resilience and turning adversity into opportunity

Facilitator: Tracey Abbott, CEO, T. Abbott Enterprises

Track C | Supporting and aligning with next generation talent

- Adjusting to culture changes when employing younger people (i.e., communication styles, working environments, etc.)
- How to re-establish a culture & get an understanding of employee expectations before it's too late
- What can CFOs do to coach and mentor junior colleagues?

Facilitator: Caroline Young, Founder, Craftsbury Consulting

Track D | Channelling New Methods of Change Management

- Understanding your audience: tailoring messages to different stakeholders
- Defining key performance indicators (KPIs) for success
- Managing conflict: turning challenges into opportunities

Facilitator: Melissa Mounce Mithal PE Insider, Advisor & Board Director, Right Arm Advisors

12:10-1:00

Fund & Cash Strategies: Now, New, Next Panel Discussions

Choose from 4 top of mind topic options, as diverse groupings of the brightest minds in the business openly discuss their journeys, pitfalls, and victories while *they discuss their approaches to implementing new fund types and accessing cash in today's market* – and the lessons they've learned along the way. Forget the crystal ball – this is an IRL look at what's to come.

Interactive audience Q&A throughout.

Track A | Market Overview: Secondaries in 2025 & Beyond

- Understanding the demand for this fund type in the market & what steps to take when launching a first-time secondaries fund
- What is the regulatory perspective on traditional and GP led secondaries?
- Assessing valuation strategies and methods in light implementing new fund vehicles

Moderator: Vishal Shah, Chief Product Officer, TresVista
Speaker: Mike Witkowski, CFO and Partner, Primary Venture Partners
Speaker: Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners
Speaker: John Cannaverde, Fund Controller, Portfolio Advisors

Track B | The Lowdown on NAV loans

- How are LP proceeds used and reinvested back into the portfolio or used to create a synthetic distribution?
- How mitigate some of the concerns around the use of NAV loans
- Getting greater transparency from potential and existing managers

Moderator: Chris Tamms, Head of Private Funds CFO Network, PEI

Speaker: Aaron Simkovich, Managing Director & Chief Financial Officer, Maranon Capital, L.P

Speaker: Joshua Cherry-Seto, Partner, CFO, StartUp Health
Speaker: Christopher Wolf, CFO, MPM BioImpact

Track C | Exploring Emerging Trends in Subscription Line Lending

- What is the demand and availability in the market for subscription lines?
- What liquidity challenges does the investors face as a result of the less frequent, but significantly larger, capital calls?
- What effects subscription line lending can have on reported fund performance figures

Moderator: Shant Mardirossian, Partner & Chief Operating Officer, Kohlberg & Company, LLC
Speaker: Kyle Wool, Chief Financial Officer, Energy Impact Partners
Speaker: Ommer Chochan, CFO, Atlas Venture
Speaker: Bela Schwartz, Chief Financial Officer, The Riverside Company
Speaker: Denis Laloy, CFO, Factorial Funds

1:00-2:00 **Networking luncheon**

2:10-3:30 **Carousel Discussions**

Following our popular roundtable and think tank formats, peers will sit down at tables to determine best practices on specific topics and their sharing ideas. At the end of each topic, tables will report back to the whole room on their approaches to addressing their challenges.

Private Funds CFO Network

New York Forum

February 4-5, 2025
Hilton Midtown, New York

Carousel 1 | Optimizing your finance team for emerging funds

- Trial and error: how are you establishing the best processes and procedures to drive success?
- What tasks should and can be outsourced?
- Determining when it's time to expand the team internally

Room Facilitator: Michaele Gobel, CFO, Equilibrium Capital

Carousel 2 | Optimizing your finance team for established funds

- Trial and error: how are you establishing the best processes and procedures to drive success?
- What tasks should and can be outsourced?
- Determining when it's time to expand the team internally

Room Facilitator: Jason Kaslow, Chief Financial & Chief Compliance Officer, Tiger Infrastructure Partners

Carousel 3 | Addressing fundraising in today's economy for emerging funds

- Is the fundraising market slowing down and what can the finance team do to elevate the fundraising journey and process across the firm?
- Using existing and predictive data to make sharper decisions
- Building prosperous relationships with banks and lenders & the impact global affairs have on the private market fundraising environment (i.e., U.S. presidential election, global conflict, inflation, regulatory scrutiny, etc.)

Room Facilitator: Aaron Chan, Chief Financial Officer, Enlightened Hospitality Investments

Carousel 4 | Addressing fundraising in today's economy for established funds

- Is the fundraising market slowing down and what can the finance team do to elevate the fundraising journey and process across the firm?
- Using existing and predictive data to make sharper decisions
- Building prosperous relationships with banks and lenders & the impact global affairs have on the private market fundraising environment (i.e., U.S. presidential election, global conflict, inflation, regulatory scrutiny, etc.)

Room Facilitator: Sarah Tomolonius, Partner, Head of Investor Relations, M13

3:30-4:00 **Networking break**

4:00-4:50 **New Faces of Finance**

*The private markets industry is embracing a younger, more diverse talent pool. This session will feature CFOs and COOs who have been recognized in our Private Funds CFO-**New Faces of Finance** list. We'll dive into topics such as:*

- Major accomplishments they've been crucial in bringing about at their firms
- How to approach leadership and innovation as younger professionals
- What it takes to become a future leader in private funds finance

Moderator: Noah Becker, Chief Financial Officer, LLR Partners
Speaker: Maryna Higgins, Director of Finance, Quona
Speaker: Carly Altieri, Principal, Victory Park Capital
Speaker: Pete Keenan, Vice President of Finance, 645 Ventures

4:50-5:00 **Closing remarks**

Noah Becker, Chief Financial Officer, LLR Partners

5:00 **End of conference**