Private Funds CFO Network

New York Forum

2026 Agenda

February 3-4, 2026

Convene Brookfield Place, 225 Liberty St, New York

Keynote speakers:

- John Stecher, Chief Technology Officer, Blackstone
- Bruce Karpati, Global Chief Compliance Officer and Counsel, KKR

Speakers:

- Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners
- Adam Bruce, Partner and Chief Financial Officer, Flare Capital Partners
- Drew Carl, Chief Accounting Officer, Hamilton Lane
- Ayanna Clunis, Head of Operations, Partner, TPG Global
- Larry Cook, Senior Vice President of Finance & Operations, Flourish Ventures
- Bethany Foullois, Partner & Chief Operating Officer, TAVO
- John Herr, Chief Financial Officer, Francisco Partners
- Brent Kelley, Chief Financial Officer and Chief Compliance Officer, North Hudson Resource Partners
- Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors
- Brandy Morris, Principal, Chief Financial Officer, AB CarVal
- Anna Nitschke, Chief Operating Officer, Activate Capital
- Andrew Petri, CFO and CCO, Pfingsten Partners
- Aaron Simkovich, Managing Director and Head of Portfolio and Fund Operations, Eldridge Capital Management
- Mike Wilkens, Chief Financial Officer, Volition Capital

Day 1 – February 3, 2026

7:30-8:30	**Registration & Breakfast**
8:30-8:45	**PEI & Chairperson's welcome**

8:45-9:50

Keynote series: State of the industry fireside chats

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

Part One: With the SEC withdrawing over a dozen proposed rules, is the private fund industry seeing a true regulatory shift—or just a temporary pause? Join Bruce Karpati, Global Chief Compliance Officer and Counsel, KKR to hear about what private fund CFOs and CCOs should expect from the next phase of regulatory policy.

9:50-10:40 **Data debrief: Forecasting & benchmarking for the CFO and COO**

In this session, we will review extensive data from the 2026 Private Funds CFO Insights Survey conducted by PEI Group, which contains findings on people, processes, and planning for the future. These insights will provide the foundation for a robust discussion with an esteemed panel of CFOs and COOs representing a broad spectrum of private funds.

10:40-11:00 **Networking break**

Divide & Dive Sessions

These dynamic twin-track sessions offer attendees the opportunity to split into two groups and explore key topics that are shaping the future of the industry. Each session is designed to help you dive deeper into the issues most critical to your firm's growth and success. Choose your dives and gain actionable insights to position your firm for success in 2026 and beyond.

11:00-11:40

Financial Technology That Delivers: Measuring ROI from Tech Adoption

- Real examples where tech-enabled workflows and centralized data have delivered measurable time and cost savings
- How better scenario modeling has translated into real ROI—like avoided overspend, optimized cash reserves, and enhanced investor confidence
- Learn how firms are achieving growth while holding team size flat—thanks to automation, consolidated reporting

Risk Management: Dealing with Market Volatility and Economic Uncertainty

- Political instability, regime change, sanctions, or trade restrictions
- Exposure to foreign currency volatility
- Monitoring cross-portfolio risk concentration (e.g., sector, customer, supplier)

environments, and more efficient workflows.

11:50-12:30

Operational Due Diligence Prep: What LPs *Really* Want to See

- Identify and address the most common ODD red flags before LPs do
- Build a proactive data room that aligns with institutional expectations
- Craft an operational narrative that reinforces your firm's readiness, reliability, and scalability

What's Next: CFO Priorities in a New Tax Environment

- Impact of Recent and Proposed U.S. Tax Changes
- Global Tax Developments & Cross-Border Structures
- Tax Reporting, Technology, and LP Expectations
- Fund Structuring, Blockers, and Tax-Efficient Exits

12:30-1:30 **Networking Luncheon**

Part One: Interactive Breakout Panels

1:30-2:20

Track A:

Reduce Burn, Extend Runway: Practical Strategies for Cost Efficiency in a High-Rate Environment

- Strategies financial discipline & strategic budgeting
- Identifying the most effective cost-saving opportunities across headcount, tech stack, and vendor management—without derailing growth
- Evaluating debt vs. equity trade-offs, non-dilutive funding options, and how to extend runway without a down round

Track B:

Cybersecurity as a Financial Risk: War Stories and Lessons Learned

- Real examples of pinpointing vulnerabilities in critical financial systems and data—and the lessons that followed
- How CFOs quantified cyber risk in financial terms to inform budgeting decisions, insurance coverage, and risk disclosures

Track C:

Acting as a thought partner to portcos

- Helping Portfolio Companies: Budgeting, Forecasting & Scenario Planning
- Establishing or supporting finance function maturity
- Strategic finance & value creation
- Advising portco CFOs and CEOs on strategic decisions (M&A, pricing, capex, financing)

Track D:
The Future of Fund Economics: Reimagined Carry Structures & Incentives

- Adapting incentive models for continuation vehicles, evergreen structures, and longer hold periods
- Evolving expectations around how much GPs should contribute and how they're incentivized beyond carry
- Designing carry and bonus structures that reward value creation earlier in the fund life, not just at exit

Track E:

Valuation Under the Microscope: Navigating Fair Value Compliance in a New Regulatory Era

- Practical approaches to defend value and maintain alignment, particularly as LPs compare strategies and vintages

Part Two: Interactive Breakout Panels

2:30-3:20

Track A:
Financing Strategy in a High-Rate Environment: Preserving Optionality and Fueling Efficient Growth

- Preserving optionality through capital structuring
- Stress testing cash flow and capital plans under macro pressure
- Redefining success metrics in a higher-cost capital environment
- Communicating capital strategy to LPs, lenders, and internal stakeholders

Track B:

The CFO/COO as Strategic Business Partner: Driving Value Beyond Operations Bullets:

- How to shift from transactional support to proactive, strategic collaboration with investment teams
- Building the skills and mindset needed to influence key business decisions and growth initiatives
- Real-world examples of CFOs/COOs leading cross-functional impact and shaping firm strategy

Track C:

Exit-Ready Financials: Preparing Portfolio Companies for Clean Exits

- Aligning portco timelines and performance with fund liquidity and return targets
- Preparing financials and forecasts for potential exits
- Ensuring clean books, data rooms, and diligence readiness
- Use of fractional CFOs

Track D:

The Operational Maturity Journey: Benchmarking Your Evolution

- Learn a practical maturity model to benchmark your firm's operational capabilities against peers
- Identify the key inflection points that signal it's time to evolve systems, processes, or structure
- Learn how to sequence improvements efficiently—prioritizing what moves the needle most

Track E:

Fundraising & LP Reporting

- Optimize fund structuring, fee flexibility, and pacing in a slower, more selective market
- Creating robust data rooms and board-ready reporting processes
- Aligning internal financial narratives with investor expectations

3:20-3:40 **Networking break**

3:40-4:30 **Vendor Voices: Agility in Action: Evolving with the Private Funds Landscape**

This dynamic panel brings together leading minds from the industry's most forward-thinking solution providers as they unpack how the industry shifted in 2025—and what's coming next in this era of transformation. From shifting regulations to emerging tech and operational innovation, our panelists will share sharp perspectives, practical insights, and future-focused strategies. Expect a candid, energetic conversation from those shaping change on the front lines. Audience Q&A to follow.

4:30-5:00 **Closing panel/keynote**

5:00-5:05 **Closing remarks**

5:05-6:00 **Cocktail reception and end of day one**

Day 2 – February 4, 2026

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

8:30-8:55 **Private Funds CFO Network Circle Breakfasts (Network members only)**

Breakfast Networking Breakout Women	**Breakfast Networking Breakout Venture Capital**	**Breakfast Networking Breakout Emerging Managers**	**Breakfast Networking Breakout Secondaries**

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 (GP only) Megafunds/Multi-Strategy Firms	**CFO & COO Think Tank (GP only) Growth/Middle-Market Firms**	**Senior Finance & Operations Executive Think Tank (GP only)**

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

10:05-10:50 **Keynote Interview**

Join John Stecher, Chief Technology Officer at Blackstone, for a forward-looking conversation on how data innovation and responsible AI are redefining the private fund back office. We'll explore how to leverage technology to create enterprise-wide value, enhance operational agility, manage risk, and build long-term competitive advantage.

John Stecher, Chief Technology Officer at Blackstone

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

Peer Subgroups: Panel Insight + Peer Dialogue
(30 min panel + 20 min think tank)

These breakout break delegates into curated subgroups. Each session begins with a sharp, focused panel featuring expert voices who'll set the stage with key insights and perspectives. After the panel, the session shifts into an interactive, room-wide conversation, inviting participants to reflect, react, and share their own experiences and challenges. It's part thought leadership, part think- tank style discussion designed to surface collective intelligence.

11:20-12:10

Track A
Emerging Managers: Building the Foundation

Contemplating launching a new fund or are you raising your first fund? Join fellow emerging managers for a candid exchange on what's working, what's tough, and what it really takes to build long-term traction and trust.

Track B
From Launch to Lift-Off: Making the Leap from Emerging to Enduring

This session explores what it takes to successfully transition from Fund I to Fund II—from building institutional credibility to scaling operations, team, and investor relationships. Hear firsthand lessons from emerging managers who've navigated the leap from startup fund to sustainable platform.

Track C
Mid-Market Momentum: Scaling with Discipline

Mid-sized firms face a unique balancing act—scaling operations, managing growing portfolios, and evolving investor expectations, all while maintaining focus and flexibility. In this pod, participants will explore strategies for disciplined growth, team development, tech

Track D
Global Players: Managing Across Borders

Operating across geographies brings scale—and complexity. This pod brings together global fund leaders to share how they're navigating cross-border fundraising, compliance, talent management, and regional market dynamics. Expect a conversation rich in nuance, where global scale meets local realities.

enablement, and maintaining edge in a competitive middle market landscape

12:20-1:10

Track A

Venture Capital: Adapting Strategy in a Reset Market

Venture capital is navigating a period of recalibration—slower deal cycles, more selective LPs, and heightened pressure on capital efficiency. In this peer exchange pod, participants will dig into how VC firms are adjusting across fundraising, deployment, portfolio support, and exit strategy. What signals are shaping 2026? Where's the smart capital going next?

Track B

Private Credit in Focus: Navigating Risk, Rates, and a Rising Role in the Capital Stack

As private credit cements its role as a core component of the capital stack, managers face a complex landscape shaped by rising interest rates, tighter liquidity, and growing investor demand. This session will explore how private credit funds are adapting to these market shifts—through disciplined underwriting, tighter loan covenants, and strategic deployment in an increasingly competitive environment. Panelists will also discuss how private lenders are positioning themselves alongside (or in place of) traditional lenders, and what the evolving rate environment means for fund strategy, borrower relationships, and risk management

Track C

Secondaries Strategy: Unlocking Liquidity, Creating Value

The secondaries market continues to evolve—from traditional LP stake sales to GP-led deals, continuation vehicles, and increasingly creative structures. This pod explores how managers and investors are navigating pricing, transparency, and execution in today's environment. Share insights on where liquidity is being found, how structures are shifting, and what's next for this maturing corner of the private fund world.
Ideal for: Secondaries-focused GPs, LPs active in the space, and managers exploring liquidity options

Track D

Real Assets: Investing at the Intersection of Opportunity and Stability

From infrastructure and real estate to renewables and natural resources, real assets are drawing renewed interest as investors seek yield, inflation protection, and long-term value. This pod brings together peers to discuss capital flows, valuation pressures, sustainability trends, and region-specific challenges. Explore how real asset strategies are evolving and where opportunities lie in 2026 and beyond.

Track E

Private Equity: Building Institutional-Grade Operations in a Resource-Constrained Environment

Emerging and mid-market managers are under increasing pressure to meet institutional standards—without the operational scale or budgets of larger firms. In this interactive breakout, we'll explore how to build LP-ready operations with limited resources.
Topics will include creative approaches to streamlining workflows, how to prioritize

Ideal for: Real asset managers, allocators, and anyone navigating hard asset strategies across sectors

operational investments, and frameworks for deciding when to build in-house vs. outsource key functions. You'll hear practical insights from peers facing similar challenges and walk away with actionable strategies for scaling smart, staying compliant, and strengthening investor confidence.

1:15-2:15 **Networking luncheon**

Technology sessions

2:15-3:05

Portfolio Monitoring

Portfolio monitoring technologies focus on tracking and analyzing individual investments within the fund's portfolio. These tools are designed to provide a holistic view of each asset in the portfolio, monitoring the health of each investment, key performance indicators (KPIs), and risk management.

Fund Performance

Fund performance technologies are primarily focused on measuring and analyzing the financial performance of a private fund. These tools are designed to track investment returns, profitability, and benchmark comparisons. The goal is to assess how well a fund is performing relative to its objectives, market benchmarks, or peers.

Process Management Tools
Tools that enhance operational efficiency, streamline workflows, and ensure compliance and accuracy in financial reporting.

- Compliance & Risk Management Tools
- Workflow Automation Tools
- Investor Relations (IR) and Reporting Software
- Document Management Systems
- Fund Accounting Software

3:10-3:35

	Portfolio Monitoring	Fund Performance	Process Management Tools
	3:10 – 3:20 10 min tech demo	3:10 – 3:20 10 min tech demo	3:10 – 3:20 10 min tech demo
	3:25 – 3:35 10 min tech demo	3:25 – 3:35 10 min tech demo	3:25 – 3:35 10 min tech demo

3:10-3:45 **Networking break**

3:45-4:35 **New faces of finance 2026**

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 2026 ***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

4:35-4:40 **Closing remarks**

4:40 **End of conference**