

Private Funds CFO Boston Roundup 2023 Agenda

Day 1: June 7, 2023

8:15-8:55 Registration – breakfast

8:55-9:00 PEI welcome

9:00-9:45 Keynote panel: View from the top: insights from influential private equity CFOs

- How have priorities changed since first stepping into the role?
 - CFOs holding a more strategic role in firm-wide initiatives
- Approaching leadership in today's working environment
- From technical to personal – what skills are valued and required for today's CFO?
- Modernizing the role: how do CFOs stay ahead of the trends?
- Advice to future leaders: how can junior or mid-level back/middle office staff prepare themselves for the C-suite?

Roundtable discussions

Roundtable discussions are 30-minute interactive, peer-driven conversations, facilitated by two industry experts, on various topics facing the GP finance and operations community. Throughout the day, facilitators will rotate tables to ensure all delegates participate in each roundtable discussion.

Roundtable 1

Cybersecurity

Roundtable 2

Technology/operational efficiencies

Roundtable 3

Talent management & development

Roundtable 4

Data management

Roundtable 5

Portfolio company management

Roundtable 6

Fundraising

Roundtable 7

Investor/management reporting

Roundtable 8

ESG/green finance

9:45-11:15 Rotations 1-3

11:15-11:45 Networking break

11:45-1:15 Rotations 4-6



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1:15-2:15 **Networking lunch break**

2:15-3:15 Rotations 7-8

Interactive panel discussions

More interactive than traditional panel discussions, these sessions start with a 20-minute panel discussion followed by a 25-minute interactive Q&A session where attendees can interact with each other and directly voice their thoughts on some of the most pressing topics.

3:15-4:00 **Track A | Technology**

Track B | Compensation

4:00-4:15 **Networking break**

Think tanks

Designed to facilitate candid discussions, these closed-door sessions target the issues and challenges impacting firms. Attendees can benchmark ideas and share best practices to help you gain solutions for common concerns facing your office.

4:15-5:15 **Think tank A (GP only) |
Outsourcing / vendor
management**

**Think tank B (GP only) | LP /
GP relationships**

**Think tank C (SP only) | Navigating
the current PE market**

5:15 **Cocktail reception and end of roundup**



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