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.

January 2024

CFO New York

Date: 30 – 31 January, Sheraton Times Square, New York
Format: In-person, 2-day member-only conference
The must-attend marquee event for senior private equity executives to network with peers, connect on shared challenges and forecast the year ahead. The Private Funds CFO Network flagship event offers connection and insight for all members on a global scale.

- Fundraising challenges in the year ahead.
- Technology, including AI, and cybersecurity.
- Talent retention and recruitment.

Women's Circle @ CFO New York (member-only)

Date: 31 January
Format: In-person, off-the-record, Women's Circle-only networking breakfast

- Join the women within the Network to connect, learn, exchange notes and promote female diversity with the industry at a breakfast meeting session.

Emerging Managers' Circle @ CFO New York (member-only)

Date: 31 January
Format: In-person, off-the-record, emerging managers-only networking breakfast

- Join the fellow members of the Emerging Managers Circle for breakfast and refreshments.

Venture Circle @ CFO New York (member-only)

Date: 31 January
Format: In-person, off-the-record, venture circle-only networking breakfast

- Join the fellow members of the Venture Circle for breakfast and refreshments.

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February 2024

Risk Management discussion on cash management and treasury best practices

Date: 14 February
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE credit

- How to best manage liquidity needs.
- How to plan for capital calls, distributions, tax distributions.
- Modeling best practices for cash management.
- What are warning signs of deterioration in firm liquidity and capital if market conditions worsen that risk managers should be monitoring over the next year or so?
- How you can improve the monitoring, measurement, and management of liquidity and capital risk as it relates to the performance of your firm and/or counterparties.

Continuing the conversation around cash management

Date: 21 February
Format: Virtual, off-the-record Q&A, 1 CPE credit

- CFOs swap cash management tips and best practices.
- How to best plan for cash needs (distributions, etc.) How far ahead? In-house or outsource this? What are the key factors in these decisions to consider?
- and more…

Private Funds adviser rules discussion

Date: 28 February
Format: Virtual, off-the-record Q&A, 1 CPE credit

- Hear about the latest compliance updates on the PF Rules.
- Discuss what practical steps should firms be taking now to prepare.
- Compare how firms are handling the reporting requirements and more.

Follow up with the FBI to answer your questions: understanding complex risks in private markets

Date: 29 February
Format: Virtual, off-the-record meeting and Q&A

- Learn more about the FBI's initiatives in the Complex Financial Crimes and Cybersecurity branches.
- Gain insights on risk management and cyber-crimes prevention.
- Learn how to vet IT vendors.
- Hear about trends in cyber crimes and how they were dealt with in order to mitigate damages.

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March 2024

Breakfast roundtable at Kroll on fund wind-down best practices & solutions

Date: 6 March
Format: In-person, off-the-record roundtable discussion, 1 CPE credit

- Hear about key issues regarding wind-downs.
- Learn what to implement now if your firm will be winding down.
- Benchmark with your peers on consolidating service providers, and rationalizing costs related to a fund wind down.
- Discuss key considerations with legal experts and consultants for private fund managers.
- Learn practical approaches and tools that firms can take to be prepared for wind downs.

Executive Coaching Series: CFO presentation skills

Date: 13 March
Format: Virtual, off-the-record Q&A, 1 CPE credit
Join us to learn best practices in CFO presenting while captivating and engaging audiences of all sizes. This session will highlight ways to help you be efficient with time, stay on topic, get buy-in, and achieve your presentational goals.

- Tackle common concerns of general presenting skills to small and large audiences, such as how to deal with difficult questions and what to do when people remain silent after you throw out a question or try to be funny.
- Address the importance and timeliness of storytelling, along with learning about measuring and maintaining control over our emotions.
- Discuss the audience, their expectations, and the appropriate structure, style, and goals needed for a successful presentation.

Executive Coaching Series: influence beyond your department

Date: 14 March
Format: Virtual, off-the-record Q&A
Join us to learn how you can become increasingly influential beyond your department and across the organization at varying levels.

- Identify the common roadblocks private funds and finance teams have in influencing others outside of their department.
- Understand the cycle of influence, which includes reputation, impression management, relationship building, and helping others achieve their goals.
- Provide tips for gaining authority through body language while attending non-finance department meetings (especially online meetings).

Where are we with AI and automation in the PE/VC industry?

Date: 21 March
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE credit

- Discuss initial steps that firms can take to move forward with AI now.

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- Learn about data readiness. What should be done regarding different categories of data? and prioritizing data?
- Gain understanding of various use cases for AI and how to identify those use cases.
- Understand the ROIs (money, time) for using AI.
- Take in the trends that are being discussed in the industry around cybersecurity, compliance, and more…

Executive Coaching Series: time management practices for development

Date: 26 March
Format: Virtual, off-the-record Q&A, 1 CPE credit
Join us to learn best practices in time management. In particular, the time to develop your team.

- Identify and discuss which work tasks suck the most of our time and how (if appropriate) we can delegate them to others.
- Reveal a simple model for prioritization of tasks and a technique to speed up delegation.
- Uncover hidden developmental opportunities “in the gaps” from cradle to grave in the employee’s journey.

April 2024

Continuing the conversation on AI and automation

Date: 12 April
Format: Virtual, off-the-record think tank and interactive discussion, 1 CPE credit
A deeper dive into how your firm might be using AI or would like to explore it.

- Benefits and drawbacks of using AI tools.
- For which finance tasks are you actually utilizing and applying it?
- How has it helped (or hindered operational efficiencies).

Fund reporting and KPIs

Date: 17 April
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE credit

- What are the key metrics to determine a fund’s performance (e.g., IRR, money multiples, public market equivalents, etc.).
- Are there other metrics to reflect a more nuanced view of a fund’s performance? (e.g., Modified IRR, alternative types of money multiples and public market equivalents).
- What are some best practices pertaining to internal reporting that might better support external reporting? and more…

May 2024

Maximize returns through data unification & analytics

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

- Understand all the various categories of data that need to be brought together (third-party data, KPI data, etc.).
- Explain how a firm can use centralization of data as a lever to capitalize on timing for value creation, exits, etc.
- Learn how data unification can make your role easier and position your team for more proactive data-driven investing and more…

Virtual Women's Circle: how to lead as a female with influence

Date: 9 May
Format: Virtual, off-the-record think tank and interactive session, 1 CPE credit

- How to lead as a female during times of significant change, disruption and challenges. How to determine our strengths to leverage.
- How do we fit in as a female senior executive in a male dominated firm and industry.
- How do we extend this beyond ourselves to empower other females?
- Share real-life examples and situations that have shaped how you have experienced and approached leadership.
- and more…

Continuation vehicles best practices

Date: 14 May
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE credit

- Hear from CFOs who have utilized continuation vehicles, case studies.
- Who should advise on these types of transactions.
- Legal considerations of continuation structures.
- Economic considerations for LPs, etc (how to treat fees, expenses, carry, etc).

Marketing Rule: presenting performance on marketing decks

Date: 20 May
Format: Virtual, off-the-record interactive panel session and Q&A

- Learn how to present performance on marketing decks.
- Discuss gross and net performance and how to represent fees and expenses.
- Understand how and when to present 'predecessor performance.'
- Learn how and when to present 'related performance.'

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- Understand how the marketing rule affects ‘extracted performance.’
- Learn about the conditions necessary to include ‘hypothetical performance.’

Private Fund Compliance Forum

Date: 22 – 23 May, Convene, Washington, DC
Format: In-person, 2-day member-only conference
With a rich 10+ year history of breaking critical information impacting our industry, private fund compliance professionals make this the must attend event of the year

- Drill down into the changes, including the private fund adviser rules, to make sure you fully understand what’s coming and how to better position your firm.
- Hear directly from the SEC to keep you up to date on what’s coming from them, prepared for potential exams, and ahead of all enforcement actions.

Continuing the conversation on continuation vehicles

Date: 28 May
Format: Virtual, on-the-record think tank, 1 CPE credit

- What do the dynamics and trends of continuation vehicles look like these days?
- What are some different structures/types of continuation vehicles?
- LP and GP Motivations for continuation structures? What are the ideal scenarios for these structures?
- What are the regulatory considerations? and more…

June 2024

Private Funds CFO Network Chicago Roundup

Date: 5 – 6 June, JW Marriott, Chicago
Format: In-person, 1-day Network conference
The must-attend intimate event that connects you with senior finance and operations executives for roundtable discussions that will provide actionable outcomes for your firm. Attendees can exchange ideas and gain actionable advice to ensure they are prepared for upcoming regulations and trends.

- Approaches to outsourcing and managing your providers.
- The intense compliance landscape.
- Data management and scaling.

Venture's Circle @ Chicago Roundup (member-only)

Date: 5, 6 JW Marriott, Chicago
Format: In-person, off-the-record, venture circle-only networking events

- Cocktail networking reception to connect with fellow Venture circle members.
- Join the Circle for breakfast and refreshments.

Women's Circle @ Chicago Roundup (member-only)

Date: 6 June, JW Marriott, Chicago
Format: In-person, off-the-record, Women's Circle-only networking breakfast

- Join the women within the Network to connect, learn, exchange notes and promote female diversity with the industry at a breakfast meeting session.

Emerging Managers' Circle @ Chicago Roundup (member-only)

Date: 6 June, JW Marriott, Chicago
Format: In-person, off-the-record, emerging managers-only networking breakfast

- Join the fellow members of the Emerging Managers Circle for breakfast and refreshments

Scaling financial operations and funds

Date: 11 June
Format: Virtual, off-the-record Q&A, 1 CPE credit

- What are the challenges firms are facing while trying to scale?
- What are some strategies and tactics to overcome these challenges.
- What are some operational efficiencies and/or technology applications/ workflows that can help spend less time on spreadsheets and more time on growth and value creation.

Executive Coaching Series: managing the younger generation

Date: 13 June
Format: Virtual, off-the-record Q&A, 1 CPE credit
Join us to discuss best practices and common headaches when supervising and supporting younger team members.

- Discuss the challenges faced today when managing the younger generation.
- Understand the needs, wants, and fears of Generation Z "Zoomers" at work.
- Focus on what we can control to help them be successful in our team.

CFO Network with Petra Funds Group at Boston Red Sox baseball game & hospitality

Date: 13 June
Format: In-person, off-the-record Network event

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Network members will enjoy the Boston Red Sox vs. Philadelphia Phillies at the iconic Fenway Park, from Pavilion Reserved seating. Network and enjoy world class baseball with the full Carl's Corner hospitality experience with all-you-can-eat buffet.

Executive Coaching Series: managing difficult conversations

Date: 18 June
Format: Virtual, off-the-record meeting, 1 CPE credit
Join us to learn how to navigate challenging conversations with peers and direct reports.

- Dig into prickly conversation topics, e.g., "I'm not your peer; I'm your boss."
- Teach you how to measure your own and others' motive bias pre-conversation.
- Develop questioning skills to coach the issue and solution from the employee.

Continuing the conversation around scaling financial operations

Date: 20 June
Format: Virtual, off-the-record think tank, 1 CPE credit

- Is your firm insourcing or outsourcing for operational efficiencies?
- What tasks of the back office are best suited to outsourced?
- Swap notes and ideas around scaling strategies that have proven successful and more…

Executive Coaching Series: moving them from good to great: developing mid-high performers

Date: 25 June
Format: Virtual, off-the-record Q&A, 1 CPE credit
Join us to learn how to empower and engage good to great performers.

- Outline the development goals and barriers (theirs and yours)
- Discuss challenges faced within private funding developing mid-high performers, such as doing the minimum, life stressors, multiple stakeholders, rewards and punishments, and their power struggle with leadership.
- Profile competencies of top performers, the behavioural differences to mid-level performers, and identify when you need to hold them accountable to higher standards.

July 2024

Private fund technology - managing system transitions

Date: 9 July
Format: Virtual, on-the-record panel discussion and Q&A, 1 CPE credit

- How to start out with a system transition.
- What to rely on from your internal IT staff and your outsourced technology company.
- What considerations should be taken into account for accounting system transition?

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Continuing the conversation on managing system transitions

Date: 18 July

Format: Virtual, off-the-record think tank, interactive session and Q&A

- Share stories on system transitions. Why do you make the switch? What sort of positive results have you seen?
- What are some lessons learned from a system transition you have experienced? For accounting systems? For operational systems?

August 2024

Choosing a compliance consultant

Date: 8 August

Format: Virtual, on-the-record Q&A, 1 CPE credit

- What factors should be taken into consideration when choosing a compliance consultant?
- Which regulatory compliance functions are best to outsource?
- What are some of the available technologies available to help with compliance? and more…

Continuing the conversation around outsourcing compliance

Date: 15 August

Format: Virtual, off-the-record think tank, interactive session and Q&A, 1 CPE credit

- Is your firm insourcing or outsourcing for compliance (or both)?
- What are the benefits and drawbacks of outsourcing compliance?
- Swap notes and ideas around outsourcing compliance that have proven successful and more…

September 2024

Service provider pitch/demo session

Date: 12 September

Format: Virtual, on-the-record pitch meeting

- You vote on which type of service providers you wish to hear from.
- We'll pick 2-3 from the top four categories and give them five minutes each to talk about their services with you.

Networking and roundtable breakfast

Date: 17 September, NYC

Format: In-person, off-the-record Network breakfast

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- Network with fellow members and enjoy breakfast with refreshments.

Service provider CFO & COO case studies

Date: 24 September

Format: Virtual, off-the-record think tank

- Compare notes on the service providers, share case studies.
- What has gone well or not gone well?

Would you recommend them, why or why not? and more…

October 2024

Data & Technology Forum

Date: 8 – 9 October, San Jose Marriott

Format: In-person, 2-day member-only conference

Formerly known as our West Coast Forum, the Data & Technology Forum aims to gather senior-level finance and operations executives from the world's foremost firms to discuss top-of-mind challenges while simultaneously implementing various technological capabilities and data management practices along the way to increase operational efficiency. Session topics include:

- The evolving responsibilities of the CFO.
- Creating a robust technology infrastructure.
- Strategic fund finance approaches.
- Scaling in a competitive industry.
- Managing ongoing regulatory changes.
- Navigating fundraising in today's economic environment.
- Undertaking modern valuation methods and protocols.
- And much more…

Venture Circle @ Data & Technology Forum (member-only)

Date: 9 October

Format: In-person, off-the-record, Venture Circle-only networking events

- Cocktail networking reception to connect with fellow Venture circle members.

Women's Circle @ Data & Technology Forum (member-only)

Date: 9 October

Format: In-person, off-the-record Women's Circle-only networking breakfast

- Join the women within the Network to connect, learn, exchange notes and promote female diversity with the industry at a breakfast meeting session.

Emerging Managers @ Data & Technology Forum (member-only)

Date: 9 October

Format: In-person, off-the-record, emerging managers-only networking breakfast

- Join the fellow members of the Emerging Managers Circle for breakfast and refreshments.

Secrets to C-Suite success

Date: 15 October

Format: Virtual, off-the-record Q&A, 1 CPE credit

- How to overcome self-sabotaging beliefs.
- Re-energize your mind, thinking with a disruptive mindset.
- Tips to transform your performance and lead your team to achieve the same.
- and more…

Executive Coaching Series: changing your brand and perceptions of you over time (inside your organization)

Date: 17 October

Format: Virtual, off-the-record Q&A, 1 CPE credit

Join us to learn how to develop (or repair) your reputation inside your organization. To be thought of as a competent professional who cares about other's success.

- Discuss common complaints relating to management, e.g., a lack of soft skills.
- Provide techniques to reset and rebuild your brand over time through relationship credits, strategic coaching conversations, and sharing success.
- Learn how to uncover and align with others' expectations to increase buy-in.

Fireside chat and Ask Me Anything with a Megafund CFO

Date: 22 October

Format: Virtual, off-the-record Q&A, 1 CPE credit

- How do they structure their day, week, month?
- What leadership frameworks and approaches are they using?
- How have they overcome challenging times in the industry and still been successful? and more…

Executive Coaching Series: Shifting from Expert to Non-Expert Leader: How to Lead When You Aren't The Expert In The Room

Date: 24 October

Format: Virtual, off-the-record Q&A, 1 CPE credit

Join us to learn how leaders can add value in team meetings, even when the topic isn't their expertise.

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- 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: 29 October

Format: Virtual, off-the-record Q&A, 1 CPE credit

Join us to learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick.

- 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.

Venture Capital Circle with a Megafund CFO

Date: 31 October

Format: Virtual, off-the-record, Venture Capital Circle-only panel discussion and Q&A, 1 CPE credit

Where is the state of VC?

- Trends in VC – marketing strategies that have worked, etc.
- What are investor networks? Is this a strategy anyone has used with success?
- The democratization of VC – what are the benefits and drawbacks? What are we seeing in fintech and online communities geared to VC strategy? and more…

November 2024

Women's Circle: fostering an inclusive culture for diverse staff at the firm

Date: 7 November

Format: Virtual, off-the-record, Women's Circle-only interactive discussion, 1 CPE credit

- How do we foster an inclusive culture for diverse staff at the firm?
- How to get buy-in from senior management for an inclusive culture.
- What are other innovative industries practicing on inclusivity that we can experiment with? and more…

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CFO Europe

Date: 13 – 14 November, London
Format: In-person, 2-day member-only conference
The Forum will bring together operations and finance professionals across all key asset classes while giving you the opportunity to network with and benchmark against your peers. Network and share with fellow CFOs on the shared challenges and solutions for European and global funds.

Women's Circle @ CFO Europe

Date: 13 – 14 November, London
Format: In-person, off-the-record, Women's Circle-only networking events

- Join the fellow members of the Women's Circle for breakfast and refreshments.
- Cocktail networking reception to connect with fellow women.

Emerging Managers' Circle @ CFO Europe

Date: 13 – 14 November, London
Format: In-person, off-the-record, emerging managers-only networking breakfast

- Join the fellow members of the Emerging Managers Circle for breakfast and refreshments.

Venture Circle @ CFO Europe

Date: 13 – 14 November, London
Format: In-person, off-the-record, venture circle-only networking breakfast

- Join the fellow members of the Venture Circle for breakfast and refreshments.

ESG in terms of value creation

Date: 19 November
Format: Virtual, on-the-record panel discussion and Q&A

- How are European firms using ESG for value creation
- What are the best ways to get the ESG metrics needed?
- What are regulatory aspect of ESGs that we need to pay comply with?

December 2024

Banking and Macroeconomy update – where are we leading into 2025

Date: 3 December
Format: Virtual, off-the-record think tank, 1 CPE credit

- 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?

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- What do we think 2025 will bring?

NYC Holiday Networking & Drinks

Date: 5 December
Format: In-person, off-the-record Network event
Join fellow Network members, to connect and toast to the end of the year.

Please note that these events are subject to change

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