

Private Funds CFO Europe Forum 2023 Agenda

Day 1: 14 November, 2023

8:00 Registration & coffee

8:00 Invite-only women's CFO & COO networking breakfast

9:00 Chairperson's Welcome Address

09:05 Operational imperatives- CFO/COO top priorities for the next 12 months

- The future of fund management over the next decade, key themes and practical issues influencing their role.
- Key factors CFOs/COOs consider vital to their strategy for accelerating their organization's growth
- Overriding implications of SVB collapse- what does it mean for the industry?

Moderator: Nicholas Clapham, Senior Vice President, Global Head of Sales (Alternatives), **State Street**
Panellists:

Alan Chu, Partner, Finance & Operations Director, **Beechbrook Capital**

Nisha Raghavan, COO, **Actis**

Chris Heyworth, Group CFO, **BC Partners**

09:45 PEI Presentation

Evie Taylor, Research Manager, **PEI**

09:55 Navigating challenges in a rising rates and inflationary climate

- In a high interest rate environment is alternatives still looking attractive in general?



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- Managing liquidity in the current economic environment. What are investors return rate horizon across private markets?
- How is this market moving forward in the new age of fewer exit possibilities & higher interest rates?
- How are CFOs and COOs making sense of the higher rates environment?

Moderator: James Duffield, Group Head of Business Development, **Aztec Group**

Panellists:

Jesper Soderberg, CFO, **Nordic Capital**

Raffael Rupprechter, Principal & CFO, **CONSTELLATION CAPITAL AG**

Phillipe Renauld, Group CFO, **Sienna Investment Managers**

10:40 Fireside chat: Future of Carried interest

- Is carried interest going to get taxed as an income?
- Should Impact-Based Incentive Structures penalize and/or reward GPs for the extent to which impact targets are met?
- Can we expect sustainability linked carry to become the mainstream?

Moderator: Simon Shipgood, Regional Director, EMEA, **EWM Global**

Panellists: Karen Sands, Chief Operating Officer, **Federated Hermes**

11:00 Networking coffee break

11:30 Accelerating ESG and meeting investor demands

- Is standardisation in reporting (managing and measuring ESG data) good for the industry?
- How are funds managing the latest investor demands in areas such as ESG?
- SFDR- is it fit for purpose for private funds?

Panellists:

Claire Hedley, ESG Director, **17Capital**

Joanne Butler, COO & Head of Investor Relations, **Dunport Capital**

Lydwine Alexandre, CFO, **PAI Partners**



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12:10 In-Focus Fireside chat: LP Secondaries & Liquidity

- Is there a wall of LP secondaries waiting to be transacted?
- Should we expect a further sale of LP stakes to secondary funds?

Panellists:

Malcolm Goddard, COO & CFO, **Zetland Capital**

Jason Howard, CFO & COO, **Headway Capital Partners**

12:35 Panel: Cultivating and retaining human talent in a competitive market

- What are the top talent management goals for private fund managers?
- How are you approaching the war for talent and shortage of personell?

Panellists:

Yves Frey, Head Corporate Operations, **SUSI Partners**

Debojit Mukherjee, COO, **Agilitas Private Equity**

13:15 Lunch and networking break

14:15 – 14:50 Breakout sessions I

Track A

Portfolio Management

- Best ways to demonstrate exceptional portfolio management to end investors
- Best tools to quantify alpha in portfolios and predict future liquidity risks?

Panellists:

Track B

Mitigating emerging cyber risks and the CFO strategy

- How to successfully balance risk without paralyzing operational teams that are trying to grow?
- How have operational teams joined with legal and compliance to mitigate risks?
- How has the SVB collapse reiterated the problem of opportunistic cyber threats?

Moderator: Simon Eyre, Chief Information Security Officer, **Drawbridge**



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Panellists:

Tom Cole, Managing Director, **Abacus Group**

14:50 – 15:25 Breakout sessions II

Track A

Navigating a changing regulatory and compliance environment

- SEC registration reporting requirements and updates to policies.
- Regulatory developments and EU taxonomy issues that private fund managers need to keep on top of.
- Operations and regulation- how do they work together?
- Impact of ELTIF regulation on retailization

Panellists:

Track B

Best practices for fund set-up

- Key factors driving and influencing advisor appointment decisions, choice of fund domicile, and the key fund establishment challenges CFO/COOs are facing.
- Assessing liquidity risks

Panellists:

Sandeep Giroud, Finance Director, **Ashgrove Capital**
Matthias Dux, Founder & Managing Partner, **Avellinia Capital**

15:25 – 16:00 Breakout sessions III

Track A

Valuation challenges in changing times

- How are valuation methods and processes changing across private assets?
- Which procedures should be in place to mitigate risk?

Panellists:

Track B

Data analytics: Is data the new oil?

- Implementing an effective data strategy to create better firm visibility
- Impact of unifying disparate data and embracing predictive analytics on operational performance
- Best tools to capitalize on value-creation opportunities



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Bijal Patel, Managing Director, Fund Services, **Actis**
Nick Latner, Finance Director, **HG Capital**

Panellists:

16:00 **Networking coffee break**

16:30 **Debate: To outsource or not to outsource- When, where and how?**

- Key areas for outsourcing and what makes for an effective outsourcing partnership.
- When is it better to do it inhouse?
- How do you balance cost and efficiency?

Moderator: Patrick McCullagh, Alter Domus

Panellists:

Rob Shaw, Partner & CFO, **Apera Asset Management**

Ted Frith, Chief Operating Officer, **GLIL Infrastructure**

Stephan Plagemann, CFO, Head of MSPA, **Mount Street**

17:00 **Off the record - Audience roundtable discussions over drinks**

- The role of data sourcing and data management to support asset verification
- Capital raising against the current macro backdrop
- Managing investor due diligence process *facilitated by* **Cameron Price**, Chief Operating Officer, **Vantage Infrastructure**
- Handling large scale integration challenges
- Democratisation of the private funds market
- The demand for NAV and hybrid financing



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**Private Funds
CFO
Network**

Europe Forum

14-15 November
Glaziers Hall, London

17:40

Networking reception



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Day 2: 15 November, 2023

8:00 Registration & Coffee

8:45 – 9:40 CFOs & COOs think tanks (GPs only)

Private equity

Private debt

Infrastructure

Real estate

Service providers

Facilitated by **Alex Geach**, Finance Director, **Vantage Infrastructure**

Facilitated by **Melinda Knatchbull**, CFO, **Sellar**

9:40 Chairperson's day 2 welcome remarks

9:45 Keynote Address

Emma Cashmore, DE&I Director, International, ex Meta

10:05 Managing risk in an ever-changing environment

- How are private funds adjusting risk management and reporting processes in the current market?
- Conducting due diligence in the current sanctions environment.
- How can failure to properly mitigate risk impact on the value of investments?

10:45 Fundraising and the denominator effect

- Have fundraising dynamics cooled down across private market asset classes?
- What's the best approach to meet investor demands and deal with longer fundraising cycles?
- How to tap data driven institutional capital to fuel growth in a challenging environment

11:15 Networking break



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11:45 Keeping up with technology integration in private markets

- Key technology implementations to drive automation
- Which focal areas are you seeing new investment ?
- Which technology benefits do CFO/COOs place most value on?

Panellists:

Richard Kirkby, CFO, **Veld Capital**

Richard Blakesley, CEO and Founder, **Capital Pilot**

Manoj Jain, Director - Group Finance Operations, **3i Group**

12:25 +Debate: Adapting to new company sizes- small, mid and large cap

- Strategies to future proof target operating models
- How do the operational challenges compare across size?
- What does it mean to be a Large cap CFO vs emerging and small scale manager? How do you compete with larger players?
- Is it harder for smaller funds to spread out CFO capabilities over investor relations, compliance, ESG etc.?

Panellists:

Kenny Miller, CFO, **FPE Capital**

13:00 Networking lunch & end of conference



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