
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 2025

## High Performance Finance Teams Series
## Executive Coaching Workshop: Building the Team

**Date**: 14 January
**Format**: Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Join us to learn how great teams are built, starting with understanding your business goals and identifying the right talent for your team. Only when you know where you're going will you know who you need to get you there. In this session, we will:

- Recognize that clarifying our current and future business goals is the first step towards identifying required roles on our team.
- Consider the capabilities that define success in these roles and ways to assess those capabilities.
- Explore approaches to filling those roles through building, buying, or borrowing talent.

## How to prepare for ODD meetings

**Date:** 16 January
**Format:** Virtual, on-the-record meeting, 1 CPE/CPD credit

- Learn what should happen before the ODD meeting such as documentation requests and the level of detail required.
- Discuss who should attend the ODD meeting, process walkthroughs and other logistics.
- Learn what should occur after the meeting – background checks, SP verification, follow ups, etc.

## High Performance Finance Teams Series
## Executive Coaching Workshop: Developing Talent

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**Date:** 21 January
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Join us to learn how the way employers provide development opportunities has changed. Careers no longer follow the traditional corporate ladder, with people often moving sideways to better themselves in different roles and areas and learning on the job. In this session, we will:

- Recognize the types of development activities that drive personal growth.
- Explore the skills required to have good coaching conversations.
- Provide participants with a methodology to structure coaching conversations that drive individual accountability for development.

## Succession Planning Best Practices

**Date:** 23 January
**Format:** Virtual, on-the-record Q&A, 1 CPE/CPD credit

- Discuss the current trends in succession planning.
- What are some of the various best practices and structures for succession planning.
- Benefits and risk management related to succession planning that we should keep in mind.

## High Performance Finance Teams Series
## Executive Coaching Workshop: Engaging for High Performance

**Date:** 28 January
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit
Join us to learn how you can get the best out of your employees. High performance extends beyond a pay check, so understanding how to engage and motivate your team is critical. In this session, we will:

- Explore the research behind motivation and identify what is in our control as managers as we seek to motivate our teams.
- Discuss how these elements of motivation come into play when we assign work to our teams.
- Be able to adjust our leadership style to the individual, to have effective conversations that maximize performance and engagement.

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# February 2025

## New York Forum

**Date**: 4-5 February, Hilton Midtown, 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.

- A benchmark against your peers about how your firm stacks up.
- Understanding of current and future regulations direct from SEC powerbrokers.
- Ideas and actions on how to optimize your back office.

## Women's Circle @ New York Forum

**Date:** 5 February, Hilton Midtown, New York
**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 diversity within the industry at a breakfast meeting session.

## Emerging Managers' Circle @ New York Forum

**Date:** 5 February, Hilton Midtown, New York
**Format:** In-person, off-the-record, emerging managers-only networking breakfast

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

## Secondaries Circle @ New York Forum

**Date:** 5 February, Hilton Midtown, New York
**Format:** In-person, off-the-record, secondaries circle-only networking breakfast

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

## Venture Circle @ New York Forum

**Date:** 5 February, Hilton Midtown, New York
**Format:** In-person, off-the-record, venture circle-only networking breakfast

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

## Fund administration: Best practices with co-sourcing

**Date:** 21 February
**Format:** Virtual, on-the-record panel Q&A, 1 CPE/CPD credit

- How to best manage liquidity needs.
- How to plan for capital calls, distributions, tax distributions.

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- 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.

### Emerging Manager’s Circle: Building a technology roadmap

**Date:** 27 February
**Format:** Virtual, on-the-record Q&A, 1 CPE/CPD credit

- Understand why and how we need technology roadmaps.
- Discuss best steps and practices for building your tech roadmap.
- Learn how can tech-enabled solutions optimize your deal lifecycle?
- How to best plan for data storage and controls.
- Learn how the technology roadmap can help drive value for your firm.

## March 2025

### Executive Coaching Series
### CFO Presentation Skills: Presenting via Zoom to Investment Professionals

**Date:** 13 March
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD 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.

### Are you prepared for SEC Exams in 2025?

**Date:** 18 March
**Format:** Virtual, on-the-record Q&A, 1 CPE/CPD credit

- Discuss the examination priorities we foresee for 2025.
- Learn from peer CFOs what they have been asked on recent exams.
- Discuss best practices for preparing for an exams and building a ‘culture of compliance’.


### Executive Coaching Series: Influencing Up Beyond Your Department

**Date:** 20 March
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit
Join us to learn how you can become increasingly influential to the people above.
Learning objectives. In this session, we will:

- Identify the common roadblocks CFOs have in influencing those above them (including getting the time from CEO/Owner/Partner/Operator) and how to level set expectations of the CFO role.
- Understand the cycle of influence, which includes reputation, impression management, relationship building, and helping others achieve their goals.
- Provide tips for actively and proactively navigating the emotional dynamics of partner succession planning and discuss how to build a functional relationship with other high-powered executives that are intense and overbearing.

### Time Management in One-on-Ones: How to Persuade Key Stakeholders Faster

**Date:** 31 March
**Format:** Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit
Join us to learn best practices in speeding up the influencing and persuasion process. In particular, the speeding up of connecting, trust building, and influencing of with key stakeholders in 1-1 meetings. In this session, we will:

- Introduce simple ways to assess how connected you are to a stakeholder.
- Identify the signs that they are losing interest, putting up barriers, or simply aren't interested.
- Learn how to reframe your argument, focusing on their goals to appeal to them.
- Discuss the art of being persuasive under pressure, and the importance of retaining power.

## April 2025

### Going Abroad for Fund Domiciliation

**Date:** 8 April
**Format:** Virtual, off-the-record interactive session, 1 CPE/CPD credit

- Running a fund based in Luxembourg – fund formation, tax implications and structures, etc.
  - Running a fund based in Delaware Cayman Islands, tax implications and structures, etc.
  - Similarities between running a fund in Luxembourg and Delaware.

### Member only Virtual Quarterly Markets Update

**Date:** 24 April, 11:30 am – 12:30 pm EST
**Format:** Virtual presentation
*PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.*


A one-hour informal conversation led by Adam Smallman and Dan Rodriguez with quarterly data and talking points from Editors. Virtual meeting is live and recorded and available for sharing afterwards. Full briefing beforehand will take place. Virtual meeting link to follow.

# May 2025

## Venture Circle: US & UK Market Trends + Innovations

**Date:** 9 May
**Format:** Virtual, on-the-record interactive session, 1 CPE/CPD credit

- Learn about the state of VC deal activity
- Discuss the state of fundraising – is it opening up, becoming more competitive? What are you doing as a result?
- Understand what the trending sectors are that are seeing funding: IT, Healthcare, financial services/fintech, etc.
- Discuss the cadence of IPO activity in the market today and expected in Q2.
- Learn similarities and differences on all of the above between US and UK markets.

## US & UK markets Fund Finance Trends

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

- Discuss the state of NAV facilities – have they become a mainstay within the arena of fund finance? How about subscription facilities?
- Discuss the state of the market of non-bank lending facilities (for NAV facilities, etc.).
- Discuss ratings and securitizations in fund finance – what are the trends now.
- Learn what is happening in regards to regulatory scrutiny on these type of facilities.
- Trends, similarities, and differences between US and UK markets.

## Supper Club: New York

**Date:** 8 May, New York City
**Format:** In-person, off-the-record networking supper
Join fellow members in the Tristate area for dinner and drinks.

## Marketing Rule: presenting performance on marketing decks

**Date:** 20 May
**Format:** Virtual, off-the-record interactive panel session and Q&A, 1 CPE/CPD credit

- 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, get prepared for potential exams, and ahead of all enforcement actions.

## June 2025

### Executive Coaching Series: Reducing Friction Early Between Senior and Junior Players

**Date:** 12 June,
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit
Join us to discuss best practices and common headaches when supervising, supporting,  and working with younger team members. In this session, we will:

- Discuss the friction points in working practices between senior players (Boomers/Gen X) and junior players (Millennials/Gen Z), leveraging the room's observations and experience.
- Identify what micromanagement is versus coaching and why some people always seem to feel micromanaged.
- Leverage the interview, onboarding, or 1-1 meeting process to uncover how they work best, how they define micro-management, and what they believe is a fair and preferred way to communicate and negotiate on process, deliverables, deadlines, consequences, short-term goals, and rewards (the communicating and negotiating yours to them – including when it is appropriate to ask "Why?" versus just doing it.
- Introduce the benefits of "Reverse-Mentoring" to inter-generational relationships.

### Executive Coaching Series: Building an Executive Presence using Gravitas and Reading the Room

**Date:** 17 June
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit
Join us to learn how to build an executive presence during and outside of meetings. In this session, we will:


- Identify and discuss your Gravitas when entering a room and discuss ways to vary this depending on who is in the room, and what their needs are. We will look at gravitas needs from the perspective of investors, operators, and associates, and the challenges CFO's face in meeting these needs.
- Teach you how to monitor and be deliberate in your tone, body language, posture, placement, and verbal habits to maximize your executive presence, as well as introduce a tool called the PVA that can help measure your gravitas.
- Develop impression management awareness and skills while understanding the threats others bring in terms of their bias and perceptions.

### Members Meeting: Boston

**Date:** 18 June, View Boston, 800 Boylston Street, 50th Floor

**Format:** In-person interactive roundtable discussion and networking event

Join fellow members with the Investor Relations Network with stunning views at View Boston for a half-day event of guided discussion and opportunities to connect. We will discuss:

- Automating the Finance Function: From Back Office to Strategic Partner
- AI & Automation for Portfolio Insights and Performance Monitoring
- Future-Proofing Finance Teams: AI Talent & Tech Integration

### Executive Coaching Series: Coaching One-on-One

**Date:** 24 June

**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Join us to learn how to apply best practices to 1-1 coaching of direct reports. This can be challenging if we are not connected, lack a plan, don't know how to navigate their emotions, or we find ourselves lecturing followed by awkward silence. In this session, we will:

- Outline ways to increase the speed of connection, and the importance of monitoring and maintaining it throughout the conversation, along with identifying early on where they are now, and where they are headed as we introduce the GROW model.
- Assess and adapt to their personality, their emotional state, and their need for a transactional or transformational coaching style, as well as monitoring your bias going into the conversation.
- Apply best practices around how and when to question, empathize, and reciprocate via storytelling to improve outcomes.

### Members Meeting: Chicago

**Date:** 25 June, 110 North Wacker Drive, 3rd floor

**Format:** In-person interactive roundtable discussion and networking event

Join fellow members with the Investor Relations Network conveniently located in Chicago for a half-day event of guided discussion and opportunities to connect. We will discuss:

- Automating the Finance Function: From Back Office to Strategic Partner

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- AI & Automation for Portfolio Insights and Performance Monitoring
- Future-Proofing Finance Teams: AI Talent & Tech Integration

## July 2025

### Trends in Fund Formation

**Date:** 9 July
**Format:** Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit
Discuss an overview of the current private equity fund formation landscape. Understand more about regulatory concerns around:

- SEC focus on fees and expenses and conflicts of interest.
- Co-investments.
- Cybersecurity.
- Current tax considerations in fund formation.

### Let's Talk Carry Structures

**Date:** 18 July
**Format:** Virtual, off-the-record interactive panel discussion, 1 CPE/CPD credit

- Learn more about best practices and trends in waterfall structures.
- Discuss European vs American waterfall and when each is best for your firm.
- Discuss hybrid carry structures and what these look like.
- Understand tools are being used for carry plan management.

### Member only Virtual Quarterly Markets Update

**Date:** 24 July, 11:30 am –12;30 pm EST
**Format:** Virtual presentation
*PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.*
A one-hour informal conversation led by Adam Smallman and Dan Rodriguez with quarterly data and talking points from Editors. Virtual meeting is live and recorded and available for sharing afterwards. Full briefing beforehand will take place. Virtual meeting link to follow.


# August 2025

### Blocker Structures and Best Practices

**Date:** 8 August

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

- Learn about blocker structures and what should be considered in using them with fund structures.
- Understand more about discounts to blocker stock sales.
- Discuss what we need to know about tax compliance related to blocker structures?
- Understand leveraged blockers and in which scenarios are they best to utilize.

### Mid-market update: What's next for the US and UK?

**Date:** 15 August

**Format:** Virtual, on-the-record interactive panel discussion and Q&A, 1 CPE/CPD credit

- Understand the market now – have firms consolidated? Have firms re-located due to tax laws?
- Discuss what might be coming for the US and UK markets regarding deal volume, exits, fundraising, etc.
- Learn more about what political implications have and will effect the landscape.
- Discuss some of the other trends happening in the US and UK (GP stakes, etc.).

# September 2025

### Venture Circle: US and UK Quarterly Update

**Date:** 12 September

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

- Discuss an overview of the state of the venture market trending themes in venture this year.
- Understand trends in fund formations.
- Discuss regulatory and tax updates impacting the US and UK.

### Secondaries Circle: Market Update

**Date:** 19 September

**Format:** Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- Discuss trends in secondaries for the year thus far.
- Understand how secondaries can help rebalance risk in the portfolio.
- Discuss the pacing of exits thus far in 2025 and the impact on secondaries.

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### AI Case Study: Hear from a CFO and an AI Provider

**Date:** 24 September
**Format:** Virtual, on-the-record interactive session, 1 CPE/CPD credit

- Learn about the RFP process.
- Discuss why the CFO/COO choose that particular AI tool.
- Understand how the relationship is now between firm and service provider.
- Learn about how the AI tool delivered outcomes for the firm.

## October 2025

### A discussion on Dividend Recaps

**Date:** 15 October
**Format:** Virtual, on-the-record interactive session, 1 CPE/CPD credit

- Learn how dividend recaps are structured as an alternative to traditional exits.
- Understand potential risks related to dividend recaps.
- Discuss how LPs are responding to dividend recaps.

### Executive Coaching Series: Changing Your Brand and Perceptions of You Over Time

**Date:** 21 October
**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit
Learn how to develop your reputation outside your organization, including how to be thought of as a competent professional who cares about other's success. In this session, we will:

- Discuss common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team.
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list.
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance.
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation.


## Executive Coaching Series: How to Lead When You Aren’t the Expert in the Room

**Date:** 23 October

**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Learn how leaders can add value in team meetings, even when the topic isn’t their expertise. In this session, we will:

- 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:** 28 October

**Format:** Virtual, on-the-record interactive workshop, 1 CPE/CPD credit

Learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will:

- 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.

## Member only Virtual Quarterly Markets Update

**Date:** 30 October, 11:30 am – 12:30 pm EST

**Format:** Virtual presentation

*PEI’s Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.*

A one-hour informal conversation led by Adam Smallman and Dan Rodriguez with quarterly data and talking points from Editors. Virtual meeting is live and recorded and available for sharing afterwards. Full briefing beforehand will take place. Virtual meeting link to follow.

## Let’s Talk Co-Invest Structures

**Date:** 31 October

**Format:** Virtual, on-the-record panel discussion and Q&A, 1 CPE/CPD credit

- Learn more about the last trends in co-investment structures.
- Discuss what venture firms should take into consideration before launching a coinvest structure.
- Understand the benefits and potential drawbacks of these structures.

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## November 2025

### The CFO’s Role with Investor Relations

**Date:** 4 November

**Format:** Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit

- Learn how to contribute to the right commercial motions to sell your firm/fund narrative.
- Understand how to segment the market by “customer,” determining potential commitment levels, and devising targeted strategies to win share of wallet. Do you know how much capital will come from your existing LPs for the next raise and how you’ll fill the gap?
  - Discuss how you’re determining your re-up rate and surrounding plans. How many new LPs do you need. Is your team right-sized to succeed?
- Is there clarity on where senior firm leadership time is best spent?
  - Should you pressure test your revised narrative to see how it’s resonating with LPs?

### Women’s Circle: Moving from CFO to Partner

**Date:** 7 November

**Format:** Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit

Join fellow women in the Network to discuss:

- Discuss how to validate your worth at the firm.
- Understand how others navigated their path from CFO to Partner.
- Discuss the leadership traits needed to move beyond CFO.

### Growth Circle: How to Stand Out in the Growth Market

**Date:** 24 November

**Format:** Virtual, on-the-record, interactive session and Q&A, 1 CPE/CPD credit

Join fellow Growth Circle members to discuss:

- Discuss factors that are driving the rise of growth equity.
- Learn how firms can stand out in order to win deals.
- Discuss how firms can use the power of technology to their advantage.

## December 2025

### Case Study on Data Management

**Date:** 2 December

**Format:** Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- Learn the initial issues the firm was having with data. What problems were they looking to solve?
- Discuss why the firm choose certain data management platforms? How are those platforms helping?
- Understand how you can keep your data secure.

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- Discuss the workflow processes of your data. What does that allow you to leverage?

### Banking and Macro Economy Update: The Market in 2026

**Date:** 9 December

**Format:** Virtual, on-the-record interactive session and Q&A, 1 CPE/CPD credit

- Have exits finally come back to a somewhat normal pace – what is happening out there in the market?
- 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?
- What do we think 2026 will bring?

***Please note that these events are subject to change***

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