

# New York Forum

February 4-5, 2025  
Hilton Midtown, New York

## Private Funds CFO New York Forum 2025 Agenda

February 4-5, 2025

### Confirmed speakers include:

#### Keynotes:

- Michael S. Chae, Sr. Managing Director & Chief Financial Officer, Blackstone
- Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions, Blackstone
- Catherine Adonna Pena, Chief Risk Officer, Nasdaq

#### Speakers:

- William Andreoni, National Asset Management Consulting Leader | Fund Services + Co-Lead, RSM US, LLP
- Ore Adegbotolu, Head of Business Development; U.S., Aztec Group
- Joann Barsky, Head of Finance and Operations, Townhall Ventures
- Noah Becker, Chief Financial Officer, LLR Partners
- Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners
- Kevin Blake, Chief Executive Officer, TechMD
- Matthew Breitfelder, Partner and Global Head of Human Capital, Apollo Global Management
- Drew Carl, Chief Accounting Officer, Hamilton Lane
- Sheenam Chadha, Chief Financial Officer, Sandbrook Capital
- Aaron Chan, Chief Financial Officer, Enlightened Hospitality Investments
- Norm Champ, Former Director of the Division of Investment Management, U.S. Securities and Exchange Commission
- Alan Chen, Chief Compliance Officer and Associate Counsel, IPI
- Karishma Chaudhary, CFO, X10 Capital Management
- Joshua Cherry-Seto, Partner, CFO, StartUp Health
- Ommer Chohan, Chief Financial Officer, Atlas Venture
- Ayanna Clunis, Partner & Head of Operations, TPG Global
- Dina Colombo, Partner, COO & CFO, GreyLion Partners
- Jamison Davis, Chief Financial Officer, Bow River Capital
- Melissa Dickerson, Managing Director, Operations & CFO, Genstar Capital
- Lisa Dobrinsky, Vice President, Two Sigma
- Dominic Elias, Chief Advisory Services Officer, EWM Global
- Chalene Ellis, Sr. Executive Director, Head of Fund Services – North America, CSC Global



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- Simon Eyre, CISO, Drawbridge
- Deborah Fields, Partner-Tax, KPMG
- Cesar Estrada, SVP, Private Markets SegmentHead, Arceisum
- Mark Feirman, CFO and Partner, Cross Rapids Capital LP
- Eric Feldman, Chief Information Officer, The Riverside Company
- Alexandria Fisk, Chief Operating Officer, Casdin Capital
- Jon Franke, Partner, Rubicon Technology Partners
- Fang Fang Fu, CFO, Turnspire, Capital Partners
- Jeffrey Gilbert, Chief Operating Officer & Chief Legal Officer, Carnelian Energy Capital
- Joshua Gilbert, CFO Outsource Consultant
- Michaele Gobel, CFO, Equilibrium Capital
- Katherine Gomer, COO & Managing Director, Maverick Ventures
- Dan Gorlick, Head of Product, iLEVEL, S&P Global Market Intelligence
- Brian Hanify, Chief Revenue Officer, TechMD
- Sadik Jakupaj, Partner & COO, Morgan Stanley
- Mike Janiszewski, Chief Operating Officer, Alter Domus
- Jason Kaslow, Chief Financial & Chief Compliance Officer, Tiger Infrastructure Partners
- LeAnn Kilarski, Chief Operating Officer, Entrepreneurial Equity Partners
- Sandi Kim-Suk, Chief Financial Officer, Cortland
- Jesse Knapel, CFO & CCO, Prelude Growth Partners
- Arthy Kumar, Industry Principal, Workiva
- Jill Lampert, Chief Financial & Administrative Officer, NPG Energy Capital Management
- Chaim Langer, Managing Director, Goldman Sachs
- Mona Laungani, Managing Director & Chief Financial Officer, J.C. Flowers
- Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors
- Danilsa Lopez, Partner, Audit Services, Grant Thornton
- Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer, Falcon Point Partners
- Alice Mann, Founder and Managing Partner, Mann Partners
- Gary Marshall, Director of Technology, Paine Schwartz Partners
- Carrie McIntyre, CEO & Partner, Viridis Fund Solutions
- Karen McMonagle, Chief Financial Officer, Corsair Capital
- Steve Mlynar, Senior Managing Director, CFO, Stonepeak
- Melissa Mounce PE Insider, Advisor & Board Director, Right Arm Advisors
- Matthew Norris, Senior Partner, Chief Financial Officer & Chief Compliance Officer, The Edgewater Funds
- Patty Nykodym, Chief Financial/Chief Compliance Officer, FFL Partners
- Deirdre O'Connor, Chief Financial Officer and Senior Managing Director, Cerberus Capital Management
- Michael Patanella, National Managing Principal, Asset Management Industry, Grant Thornton
- Brad Pietras, Director of Finance, Level Equity



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- John Polis, Chief Operating Officer & Chief Technology Officer, Star Mountain Capital
- Sunil Rao, COO & SVP, Finance, Plum Alley
- Berat Riftai, Chief Financial Officer & Chief Compliance Officer, Heartwood Partners
- Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen2
- Bela Schwartz, Chief Financial Officer, The Riverside Company
- Aaron Simkovich, Managing Director & Chief Financial Officer, Maranon Capital, L.P.
- Steve Sims, Chief Operating Officer and Chief Compliance Officer, Braemont Capital
- Vishal Shah, Chief Product Officer, TresVista
- Kevin Slaton, Chief Financial Officer, Insight Equity
- Ruchir Swarup, Partner, Chief Information Officer, KKR
- Katie Twomey, Vice President of Finance & Operations, Illumen Capital
- Raymond Updyke, VP of Operations & Finance, Alpaca VC
- Henry Ward, CEO & Co-Founder, Carta
- Jason Weinstein, SVP, Senior Director, Head of Private Equity & Venture Capital, FactSet
- Matt Whelan, Partner & Chief Financial Officer, Atlas Venture
- Mike Witkowski, CFO and Partner, Primary Venture Partners
- Christopher Wolf, CFO, MPM BioImpact
- Kyle Wool, Chief Financial Officer, Energy Impact Partners
- Caroline Young, Founder, Craftsbury Consulting

## Day 1 February 4

**8:00-9:00**      **Registration – breakfast**

**9:00-9:10**      **PEI welcome**

**9:10-9:15**      **Chair’s welcome**

Noah Becker, Chief Financial Officer, LLR Partners



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**9:15-10:05**

**Keynote interview: Michael S. Chae, Sr. Managing Director & Chief Financial Officer, Blackstone & Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions, Blackstone**

*We are honored to welcome Blackstone's Michael S. Chae, Chief Financial Officer and Vik Sawhney, Chief Administrative Officer & Global Head of Institutional Client Solutions for a keynote interview.*

*In this pivotal session, Michael and Vik will delve into the current economic landscape, providing a comprehensive analysis tailored for today's CFOs, COOs and senior finance executives.*

*Drawing from his extensive experience leading one of the world's largest and most influential investment firms, Michael will share his perspectives on navigating financial complexities, adapting to regulatory changes, and leveraging strategic opportunities in a rapidly evolving environment. Attendees will gain valuable insights into the key challenges and emerging trends shaping the financial industry, equipping them with the knowledge to steer their organizations with confidence and foresight.*

**10:05-10:45**

**Data Debrief: Trends Driving Focused Forecasting, Benchmarking Breakthroughs - and What They Mean for the Future of Private Funds**

*Reviewing in-depth people, planning and process data from PEI Group's 2025 Private Funds Annual CFO Insights Survey, our panel of industry leading executive panelists will breakdown how this essential research can and should shape the future of your firm, inform your strategies – and rewrite the landscape of private funds as we now know it.*

**Speaker:** Deirdre O'Connor, Chief Financial Officer and Senior Managing Director, Cerberus Capital Management

**Speaker:** William Andreoni, National Asset Management Consulting Leader | Fund Services & Co-Lead, RSM US LLP

**Speaker:** Heather Dickerson, Managing Director & CFO, Genstar Capital

**10:45-11:15**

**Networking break**



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**11:25-12:25**

## State of the industry fireside chats

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

### Part 1 | Understanding where the regulatory environment is heading

*Join us for an insightful discussion with Norm Champ the former Director of the Division of Investment Management at the U.S. Securities and Exchange Commission (SEC). In this exclusive interview, we will delve into how investment firms can stay ahead of regulatory changes and build robust compliance programs.*

*Key Topics Include:*

- *Anticipating SEC Developments: Gain expert insights on emerging trends and potential regulatory shifts from the SEC. Discover strategies for firms to proactively adapt to new rules and expectations, ensuring they remain compliant and competitive in a dynamic regulatory environment.*
- *Building a Successful Compliance Program: Learn about the essential components of a strong compliance program. Explore best practices for designing and implementing effective compliance frameworks that not only meet regulatory requirements but also foster a culture of integrity and accountability.*

Speaker:

Norm Champ, Former Director of the Division of Investment Management, U.S. Securities and Exchange Commission

**Moderator:** Henry Ward, CEO & Co-Founder, Carta

### Part 2 | Driving Success Through Human Capital: Strategies for the Private Funds Industry

*This interview will offer a rare opportunity to hear directly from one of the leading voices in human capital strategy and gain practical insights that can help shape the future of talent management in private funds. Whether you're looking to build a more inclusive culture, adopt data-driven practices, or improve your firm's talent retention, this conversation will provide actionable takeaways to help your firm excel in the competitive private funds sector.*

*Key Topics Include:*

- *Current Trends in Recruitment and Retention*
- *Building an Innovative and Inclusive High-Performance Culture*
- *Leveraging Data-Driven Approaches to Human Capital*

Speaker:

Matthew Breitfelder, Partner and Global Head of Human Capital, Apollo Global Management

**Moderator:** Henry Ward, CEO & Co-Founder, Carta



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## **Part 3 | Leveraging Technology for Efficiency and Risk Mitigation in Private Funds**

*Ruchir will delve into KKR's technology vision, discussing how the integration of data analytics, artificial intelligence, and digital tools is reshaping the private equity landscape.*

*He will also offer a forward-looking perspective on how private funds can leverage technology to streamline operations, drive efficiencies, and minimize risk.*

Speaker:

Ruchir Swarup, Partner, Chief Information Officer, KKR

**Moderator:** Henry Ward, CEO & Co-Founder, Carta



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12:25-1:25      Networking luncheon

1:30-2:30

## Breakout panels with peer-to-peer workshops

*Ever wish you could delve into a panel's discussion topics with your peers – or the panelists themselves – while they're still at the top of your mind and the tip of your tongue? In these uber-interactive breakout sessions, you get to do both!*

*HOW IT WORKS: Choose from 5 different deep dive topic options for a dynamic panel discussion on stage, followed by panelist-led small group brainstorms and breakdowns of panel subtopics.*

*These interactive sessions end with the panelists reporting back to the larger audience so everyone may benefit from the knowledge shared amongst the smaller groups during their peer-to-peer workshops*

### Track A | Power Prep: Exploring New Tactics for Present Day SEC Exam | Peer-to-Peer Compliance Workshop

- SEC priorities are constantly changing year to year - are you keeping up? We'll unpack the 2025 exam's most pressing priorities
- An audit can happen anytime and constant, diligent prep is key - learn how to decipher which best practices ensure your firm's exam readiness - at all times
- The keys to navigating reoccurring exam themes of recent years

**Speaker:** Jon Franke, Partner, Rubicon Technology Partners

**Speaker:** Alan Chen, Chief Compliance Officer and Associate Counsel, IPI

**Speaker:** Mona Laungani, Managing Director & Chief Financial Officer, J.C. Flowers

### Track B | Beyond the Buzz: Tailoring your Tech Stack for Agility, Velocity, and True Value | Peer-to-Peer Tech Stack Workshop

- Trial and error: when is it the right time to investigate new vendors and solutions?
- What tech solutions are firms turning to as workloads increase with limited resources?
- Determining key considerations for costs, risks and characteristics of providers to quickly (but safely) find your firm's footing in a rapidly evolving market

**Moderator:** Ore Adegbotolu, Head of Business Development; U.S., Aztec Group

**Speaker:** Matthew Norris, Senior Partner, Chief Financial Officer & Chief Compliance Officer, The Edgewater Funds

**Speaker:** John Polis, Chief Operating Officer & Chief Technology Officer, Star Mountain Capital



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## Track C | Data Driven, Future Facing: Keeping up with the Accelerated Evolution of Firmwide Data Management | Peer-to-Peer Data Management Workshop

- New approaches to developing data repositories, collecting diverse, accurate, timely data across your firm, and ensuring the value of collected data
- Exploring new, non-traditional uses for precise, informed data-driven decisions across your firm
- How to better take advantage of AI's increasingly significant role in data management

**Speaker:** Joann Barsky, Head of Finance and Operations, Townhall Ventures

**Speaker:** Dina Colombo, Partner, COO & CFO, GreyLion Partners

**Speaker:** Brad Pietras, Director of Finance, Level Equity

**Speaker:** Cesar Estrada, SVP, Private Markets Segment

Head, Arcesium

## Track E | Carried Interest 2025: Building credible & creative carried interest programs for the Now & Next Generations | Peer-to-Peer Carried Interest Workshop

- How to find the right vesting structure and allocation methods for your firm
- Deciphering the best time to make changes to an existing carry program
- What are millennials & gen-z expecting from carry & how does it differ from other generations at your firm?



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**Speaker:** Matt Whelan, Partner & Chief Financial Officer, Atlas Venture

**Speaker:** Jason Weinstein, SVP, Senior Director, Head of Private Equity and Venture Capital, FactSet

## Track D | Bigger, Bolder, Better!: Scaling your firm as Private Markets Evolve | Peer-to-Peer Scaling Workshop

- How does scaling differ between asset classes - and what operational strategies can be learned and applied from those outside your class?
- How does a firm balance resourcing and staffing to solve immediate needs while having a strategic mindset for future growth?
- Investor inquires: what do new and existing investors want to see from firms as they scale?

**Speaker:** Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors

**Speaker:** Sandi Kim-Suk, Chief Financial Officer, Cortland

**Speaker:** Mike Janiszewski, Chief Operating Officer, Alter Domus



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**Moderator:** Dominic Elias, Chief Advisory Services Officer,  
EWM Global

**Speaker:** Berat Riftai, Chief Financial Officer & Chief  
Compliance Officer, Heartwood Partners

**Speaker:** Lisa Dobrinsky, Vice President Two Sigma

**Speaker:** LeAnn Kilarski, Chief Operating Officer,  
Entrepreneurial Equity Partners

2:35-3:25

## Facing the Future: Now, New, Next Panel Discussions

Choose from 4 top of mind topic options, as diverse groupings of the brightest minds in the business openly discuss their journeys, pitfalls, and victories while designing the essential blueprint for their firm's future – and the lessons they've learned along the way. Forget the crystal ball – this is an IRL look at what's to come.

Interactive audience Q&A throughout.

### **Track A | Collaborations that Click: Aligning with Portfolio Companies through Values & Future-Facing Vision**

- How to define and strengthen your role as a CFO and COO in portfolio collaborations
- Establishing proper KPIs and performance metrics for a diverse set of portfolio companies
- Determining the best solutions and tech tools for the crucial exchange of data with portfolio companies

**Speaker:** Tracy Pizzi, Partner, Yellow Wood Partners

**Speaker:** Katherine Gomer, COO & Managing Director,  
Maverick Ventures

**Speaker:** Alexandria Fisk, Chief Operating Officer, Casdin  
Capital

**Speaker:** Dan Gorlick, Head of Product, iLEVEL, S&P Global  
Market Intelligence

### **TRACK B | War Games: Battling & Beating the Cybersecurity Risks of the Now & Future**

- Exploring new ways of ensuring all firm employees are fully prepared for the latest risks & forecasted future of cyber-invasions
- Learn how varied sizes of firms are firms handling off-channel communications
- Portfolio company cyber protection & fully unpacking the GP's fiduciary duty in 2025 and beyond

**Speaker:** Gary Marshall, Director of Technology, Paine  
Schwartz Partners

**Speaker:** Joshua Gilbert, CFO Outsource Consultant

**Speaker:** Eric Feldman, Chief Information Officer, The  
Riverside Company

**Speaker:** Simon Eyre, CISO, Drawbridge



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## Track C | Bots, Buzz & the Brave New world: How AI is Transforming the Now & Future of Private Funds (\*and what a CFO can actually do with it)

- Getting started with current AI tools for risk assessment, processing financial data/valuation models, as well as investment discovery & deal sourcing
- Will AI be used to optimize investment portfolios based on current market conditions?
- How AI will be increasingly used to automate compliance processes - and what your firm can do to quickly adapt

**Moderator:** Michael Patanella, National Managing Principal, Asset Management Industry, Grant Thornton Advisors LLC

**Speaker:** Drew Carl, Chief Accounting Officer, Hamilton Lane

**Speaker:** Ayanna Clunis, Head of Operations, Partner, TPG

**Speaker:** Steve Sims, Chief Operating Officer and Chief Compliance Officer, Braemont Capital

**Speaker:** Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen2

## Track D | Getting Global: Navigating New & Next Geographical Markets, Domiciles & the Foreign Waters of the Future

- The ins & outs of working with multinational providers & banks, cross-border fundraising tactics & regulatory impact when working in different domiciles
- How firms are communicating their product offerings for LPS & Assessing client needs as client bases are diversifying
- Weighing the risks, rewards and team preparation needed for potential pain points when venturing into the international market

**Speaker:** Steve Mlynar, Senior Managing Director, CFO, Stonepeak

**Speaker:** Karen McMonagle, Chief Financial Officer, Corsair Capital

3:25-3:50

Networking break

3:55-4:45

**Executive Engagement Collaboratives**



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*These GP-Only deep dive, closed door think tank discussions will be led by two subject matter experts from 2 different sides of the industry and interwoven with group exercise or collaborative problem solving as it pertains to the session topic. These unique breakout sessions are an incredible opportunity for truly transparent talks and takeaways you won't want to miss.*

## EEC A | Total Tax Deep-Dive: Navigating the Tax Trials, Tribulations & Effects of the 2024 Presidential Election

- The Tax Impact of the 2024 Election
- Tax Planning Highlights- GP Concerns

**Facilitator:** Deborah Fields, Partner-Tax, KPMG

## EEC B | CFOverload: Successfully Managing Today's Compliance Workload

- How are you keeping your financial records in place - Are there different needs to meet compliance protocols?
- At varied firms' stages and AUM parameters, what are you most concerned with?
- Managing & Preparing for the Future of the dual hatted CFO/CCO

**Facilitator:** Fang Fang Fu, CFO, Turnspire Capital Partners

## EEC C | The Ins & Outs of Mastering Modern-Day Investor Reporting

- Understanding LP reporting expectations & aligning current reporting timelines with regulatory pressures
- What do varied types of investors expect? (i.e., institutional investor, individual investor, etc.)
- Facing requests for additional information outside of reports

**Facilitator:** Jeffrey Gilbert, Chief Operating Officer & Chief Legal Officer, Carnelian Energy Capital

## EEC D | Staying Ahead: Exploring New Methods of Management for the CFO

- How to better organize your firm's management fees and expenses
- Where firms are currently allocating cash & how to budget efficiently to keep the firm afloat
- Get the download on the benefits of various fund types as a manager



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Facilitator: Chalene Ellis, Sr. Executive Director, Head of Fund Services - North America, CSC Global

**Facilitator:** Mark Feirman, CFO and Partner, Cross Rapids Capital LP

## EEC E | Leveraging Technology Services to Drive

### Value

Facilitator: Eric Dirst, Chief Technology Advisor, Align Capital Partners

Facilitator: Kevin Blake, Chief Executive Officer, TechMD

Facilitator: Brian Hanify, Chief Revenue Officer, TechMD

4:50-5:40

## Vendor Voices: Adaptation, Agility & The Current Landscape of Private Funds

This in-depth panel discussion will bring together a diverse group of experts hailing from the industry's most innovative solution providers to share their unique insights & viewpoints on the state of Private Funds in 2025 - and far beyond. Join us for a frank, lively, future-facing panel discussion amongst those at the forefront of transformation, change and the rapid evolution taking place in the industry right now. Interactive audience Q&A to follow.

**Speaker:** Danilsa Lopez, Partner, Audit Service, Grant Thornton

**Speaker:** Carrie McIntyre, CEO & Partner, Viridis Fund Solutions

**Speaker:** Arthy Kumar, Industry Principal, Workiva

5:40-5:45

## Closing remarks



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5:45 Cocktail reception and end of day one

## Day 2 February 5

8:00-9:30 Breakfast

8:15-8:55 **Private Funds CFO Network Membership Circle Breakfasts (Network members only)**

*Delegates will enjoy breakfast at breakout sessions based on membership circle involvement.*

### Women

**Facilitator:** Karishma Chaudhary, CFO, X10 Capital Management

**Facilitator:** Sheenam Chadha, Chief Financial Officer, Sandbrook Capital

### Venture Capital

**Facilitator:** Sunil Rao, COO, SVP, Finance, Plum Alley

**Facilitator:** Raymond Updyke, VP, Operations & Finance, Alpaca VC

### Emerging Managers

**Facilitator:** Jesse Knapel, CFO & CCO, Prelude Growth Partners

### Secondaries

**Facilitator:** Chaim Langer, Managing Director, Goldman Sachs

**Facilitator:** Sadik Jakupaj, Partner & COO, Morgan Stanley

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 for



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### CFO & COO

Think Tank for

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## Emerging Funds (GP only)

**Facilitator:** Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer, Falcon Point Partners

**Facilitator:** Katie Twomey, Vice President of finance & Operations, Illumen

## Established Funds (GP only)

**Facilitator:** Kevin Slaton, Chief Financial Officer, Insight Equity

**Facilitator:** Jill Lampert, Chief Financial & Administrative Officer, NPG Energy Capital Management

## Think Tank (GP only)

**Facilitator:** Patty Nykodym, Chief Financial/Chief Compliance Officer, FFL Partners

**Facilitator:** Lisa Dobrinsky, Vice President Two Sigma

10:00-10:05 Chair's opening remarks

## 10:05-10:50 Keynote interview

### **Fireside Chat with Catherine Addona-Peña, SVP and Chief Risk Officer, Nasdaq**

This in-depth Keynote Fireside Chat will explore the increasingly omnipresent role of risk management in today's operating environment - you'll walk away with a deeper understanding of key risk considerations when operationalizing and integrating artificial intelligence platforms, a view into the emerging risks and challenges facing operators in 2025, and how to continually promote a proactive culture of risk management across your organization.

**SPEAKER:** Catherine Addona Pena, SVP & Chief Risk Officer, Nasdaq

10:50-11:20 Networking break

11:20-  
12:05

## Professional Development Workshops

*These sessions are designed to provide insights and tips for individual success in their roles and how to best support their firms.*



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## Track A | Leveling Up: Leveraging the Power of Leadership

- Defining leadership and what it means to be a leader in today's working world
- Understanding where and when to voice your opinions
- Team building & striking a balance between creating independent and collaborative team members

**Facilitator:** Alice Mann, Founder and Managing Partner, Mann Partners

## Track C | Supporting and aligning with next generation talent

- Adjusting to culture changes when employing younger people (i.e., communication styles, working environments, etc.)
- How to re-establish a culture & get an understanding of employee expectations before it's too late
- What can CFOs do to coach and mentor junior colleagues?

**Facilitator:** Caroline Young, Founder, Craftsbury Consulting

## Track B | Leadership in Complex, Risk-Filled Environments

- Adapting leadership styles to manage uncertainty
- How effective leaders turn risk into results
- Leadership resilience and turning adversity into opportunity

## Track D | Channelling New Methods of Change Management

- Understanding your audience: tailoring messages to different stakeholders
- Defining key performance indicators (KPIs) for success
- Managing conflict: turning challenges into opportunities

**Facilitator:** Melissa Mounce PE Insider, Advisor & Board Director, Right Arm Advisors



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# New York Forum

February 4-5, 2025  
Hilton Midtown, New York

12:10-  
1:00

## Fund & Cash Strategies: Now, New, Next Panel Discussions

Choose from 4 top of mind topic options, as diverse groupings of the brightest minds in the business openly discuss their journeys, pitfalls, and victories while *they discuss their approaches to implementing new fund types and accessing cash in today's market* – and the lessons they've learned along the way. Forget the crystal ball – this is an IRL look at what's to come.

Interactive audience Q&A throughout.

### Track A | Market Overview: Secondaries in 2025 & Beyond

- Understanding the demand for this fund type in the market & what steps to take when launching a first-time secondaries fund
- What is the regulatory perspective on traditional and GP led secondaries?
- Assessing valuation strategies and methods in light implementing new fund vehicles

**Moderator:** Vishal Shah, Chief Product Officer, TresVista

**Speaker:** Mike Witkowski, CFO and Partner, Primary Venture Partners

**Speaker:** Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners

### Track C | Exploring Emerging Trends in Subscription Line Lending

- What is the demand and availability in the market for subscription lines?



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### Track B | The Lowdown on NAV loans

- How are LP proceeds used and reinvested back into the portfolio or used to create a synthetic distribution?
- How mitigate some of the concerns around the use of NAV loans
- Getting greater transparency from potential and existing managers

**Speaker:** Aaron Simkovich, Managing Director & Chief Financial Officer, Maranon Capital, L.P

**Speaker:** Joshua Cherry-Seto, Partner, CFO, StartUp Health

**Speaker:** Christopher Wolf, CFO, MPM BioImpact

### Track D | Launching a First-Time Private Credit Investment Strategy

- What steps to take when launching a first-time private credit fund

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- What liquidity challenges does the investors face as a result of the less frequent, but significantly larger, capital calls?
- What effects subscription line lending can have on reported fund performance figures
- Establishing fee amounts and structures & lifecycle considerations
- Assessing valuation strategies and methods in light implementing new fund vehicles

**Speaker:** Jamison Davis, Chief Financial Officer, Bow River Capital

**Speaker:** Kyle Wool, Chief Financial Officer, Energy Impact Partners

**Speaker:** Ommer Chochan, CFO, Atlas Venture

**Speaker:** Bela Schwartz, Chief Financial Officer, The Riverside Company

**1:00- Networking luncheon**

**2:00**

**2:10- 3:30**

## Carousel Discussions

*Following our popular roundtable and think tank formats, peers will sit down at tables to determine best practices on specific topics and their sharing ideas. At the end of the session, each table will report back to the whole room on their finalized approaches to addressing their challenges.*

**Carousel 1 | Optimizing your finance team for emerging funds**

**Carousel 2 | Optimizing your finance team for established funds**

- Trial and error: how are you establishing the best processes and procedures to drive success?



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- Trial and error: how are you establishing the best processes and procedures to drive success?
- What tasks should and can be outsourced?
- Determining when it's time to expand the team internally
- What tasks should and can be outsourced?
- Determining when it's time to expand the team internally

**Room Facilitator:** Michaele Gobel, CFO,  
Equilibrium Capital

**Room Facilitator:** Jason Kaslow, Chief Financial & Chief  
Compliance Officer, Tiger Infrastructure Partners

## Carousel 3 | Addressing fundraising in today's economy for emerging funds

- Is the fundraising market slowing down and what can the finance team do to elevate the fundraising journey and process across the firm?
- Using existing and predictive data to make sharper decisions
- Building prosperous relationships with banks and lenders & the impact global affairs have on the private market fundraising environment (i.e., U.S. presidential election, global conflict, inflation, regulatory scrutiny, etc.)

**Room Facilitator:** Aaron Chan, Chief Financial Officer, Enlightened Hospitality Investments

## Carousel 4 | Addressing fundraising in today's economy for established funds

- Is the fundraising market slowing down and what can the finance team do to elevate the fundraising journey and process across the firm?
- Using existing and predictive data to make sharper decisions
- Building prosperous relationships with banks and lenders & the impact global affairs have on the private market fundraising environment (i.e., U.S. presidential election, global conflict, inflation, regulatory scrutiny, etc.)

**3:30- Networking break**

**4:00**

**4:00- New Faces of Finance 2025**

**4:50**



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*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 2025 **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

**4:50- Closing remarks**

**5:00**

**5:00 End of conference**



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