Private Funds CFO Network

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

Speakers:

- Joann Barsky, Head of Finance and Operations, Townhall Ventures
- Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners
- Drew Carl, Chief Accounting Officer, Hamilton Lane
- Sheenam Chadha, Chief Financial Officer, Sandbrook Capital
- 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
- Ommer Chohan, Chief Financial Officer, Atlas Venture
- Ayanna Clunis, Partner & Head of Operations, TPG Global
- Dina Colombo, Partner, COO & CFO, GreyLion Partners
- Lisa Dobrinsky, Vice President Two Sigma
- Mark Feirman, CFO and Partner, Cross Rapids Capital LP
- 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, Freestyle
- Katherine Gomer, COO & Managing Director, Maverick Ventures
- Jun Isoda, Partner and Chief Financial Officer, Siguler Guff
- Jason Kaslow, Chief Financial & Chief Compliance Officer, Tiger Infrastructure Partners
- Monica Kelsey, Chief Financial Officer, Antares Capital
- LeAnn Kilarski, Chief Operating Officer, Entrepreneurial Equity Partners
- Sandi Kim-Suk , Chief Financial Officer and Chief Administrative Officer, Engine No. 1
- Jesse Knapel, CFO & CCO, Prelude Growth Partners

- Jill Lampert, Chief Financial & Administrative Officer, NPG energy
- Kristen Laguerre, Partner, Finance and Operations, MPM BioImpact
- Mona Laungani, Managing Director & Chief Financial Officer, J.C. Flowers
- Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors
- Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer
- Alice Mann, Founder and Managing Partner, Mann Partners
- Gary Marshall, Director of Technology, Paine Schwartz Partners
- Steve Mlynar, Senior Managing Director, CFO, Stonepeak
- 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
- Tara O'Grady, Chief Financial Officer, Paceline Equity Partners
- Brad Pietras, Director of Finance, Level Equity
- Tracy Pizzi, Partner, Yellow Wood Partners
- John Polis, Chief Operating Officer & Chief Technology Officer, Star Mountain Capital
- Berat Riftai, Chief Financial Officer & Chief Compliance Officer, Heartwood Partners
- Aaron Simkovich, Managing Director & Chief Financial Officer, Maranon Capital, L.P.
- Steve Sims, Chief Operating Officer and Chief Compliance Officer, Braemont Capital
- Kevin Slaton, Chief Financial Officer, Insight Equity
- Katie Twomey, Vice President of Finance & Operations, Illumen Capital
- Matt Whelan, Partner & Chief Financial Officer, Atlas Venture
- Mike Witkowski, CFO and Partner, Primary Venture Partners
- 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**

Seth Kerker, Director of Memberships & Events, **PEI Group**

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

9:15-10:05 **Keynote interview: Michael S. Chae, Sr. Managing Director & Chief Financial Officer, Blackstone**

We are honored to welcome Michael S. Chae, Chief Financial Officer of Blackstone, as our keynote speaker for an insightful state-of-the-industry overview. In this pivotal session, Michael 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

10:45-11:15 **Networking break**

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.

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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:

1. *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.*
2. *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

Part 2| TBA

Part 3 | TBA

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

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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

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

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

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: Kristen Laguerre, Partner, Finance and Operations, MPM BioImpact
Speaker: Eric Lazear, Deputy COO / Head of Operational Risk Due Diligence, Titan Advisors
Speaker: Sandi Kim-Suk, Chief Financial Officer and Chief Administrative Officer, Engine No. 1

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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?

Speaker: Berat Riftai, Chief Financial Officer & Chief Compliance Officer, Heartwood Partners
Speaker: Tara O'Grady, Chief Financial Officer, Paceline Equity Partners
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.

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Track A | Collaborations that Click: Aligning with Portfolio Companies though 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

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, Freestyle

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

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

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: Carolyn Campbell, Chief Operating Officer, Emerging Capital Partners (tentative)

PEI

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3:25-3:50 **Networking break**

3:55 – 4:45 **Executive Engagement Collaboratives**

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 impact of the 2024 election on taxing on the fund and portfolio company level
- Understanding tax efficiencies about fund structuring changes i.e., funding a GP commitment and waivers

EEC | 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

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 & and how to budget efficiently to keep the firm afloat

- 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

- Get the download on the benefits of various fund types as a manager

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

EEC E| TBA

4:50-5:40 **Vendor voices: how to work together a create successful partnerships**

- Experts from various solution providers will share their insights on the dynamics of partnerships between service providers and private funds, examining how these collaborations can drive success
- Practical strategies for building sustainable partnerships, leveraging resources effectively, and enhancing service outcomes through innovative collaboration

5:40-5:45 **Closing remarks**

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	**Venture Capital**	**Emerging Managers**	**Secondaries**
Facilitator: Karishma Chaudhary, CFO, X10 Capital Management **Facilitator:** Sheenam Chadha, Chief Financial Officer, Sandbrook Capital	**Facilitator:** TBA	**Facilitator:** Jesse Knapel, CFO & CCO, Prelude Growth Partners	**Facilitator:** TBA

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 Emerging Funds (GP only)	**CFO & COO Think Tank for Established Funds (GP only)**	**Senior Finance & Operations Executive Think Tank (GP only)**
Facilitator: Vijay Maharaj, Chief Financial Officer & Chief Compliance Officer, Falcon Point Partners	**Facilitator:** Kevin Slaton, Chief Financial Officer, Insight Equity	**Facilitator:** Patty Nykodym, Chief Financial/Chief Compliance Officer, FFL Partners

Facilitator: Jill Lampert, Chief Financial & Administrative Officer, NPG energy

Facilitator: Lisa Dobrinsky, Vice President Two Sigma

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

10:05-10:50 **Keynote interview**

To be announced.

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.

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 B | Powering through Project Management

- How are CFOs staying on top of their workloads & prioritizing tasks?
- Delegating work amongst team and firm members & ensuring work assigned to other teams is accomplished
- How to be adaptable throughout a project life cycle & identifying the right time to take on a new project

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 D | Channelling New Methods of Change Management

- How to communicate persuasively and efficiently
- Steering conversations in a productive, strategic manner
- Proactive negotiation tactics

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

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: Mike Witkowski, CFO and Partner, Primary Venture Partners
Speaker: Blake Bennett, Chief Financial Officer & Chief Compliance Officer, Revelstoke Capital Partners

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

Track C | Exploring Emerging Trends in Subscription Line Lending

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

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

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

- What steps to take when launching a first-time private credit fund
- Establishing fee amounts and structures & lifecycle considerations
- Assessing valuation strategies and methods in light implementing new fund vehicles

1:00-2:00 Networking luncheon

2:10-3:30 **Carousel Discussions**

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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

- 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

Carousel 2 | Optimizing your finance team for established funds

- 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

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.)

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.)

3:30-4:00 Networking break

4:00-4:50 New Faces of Finance 2025

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

4:50-5:00 Closing remarks

5:00 End of conference