

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

## Private Funds CFO Europe Forum 2024 Agenda

Day 1: 13 November, 2024

8:00 Registration & coffee

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

9:00 Chairperson's Welcome Address

### 09:05 Opening Panel: CFO/COOs outlook- Preparing operations for the future

- Predictions for the future of the CFO role to manage a fund
- Preparation for future operational & finance challenges in a high inflation and rising rate climate.
- Impact of AI on fund operations and portfolio business models
- Operational trends and best practices to help GPs make the most of opportunities?
- Key operational challenges (Data operating models etc.)

Moderator: **J. Scott Carpenter**, Executive Vice President, Global Head of Private Markets, Credit & Hedge, **State Street**

Panellists: **Brendan Dolan**, CFO-Europe Operations, **H.I.G. Capital**

**Thomas Lack**, CFO/COO, **All Seas Capital**

**Karen Sands**, Chief Operating Officer Private Equity, **Federated Hermes**

### 09:45 Keynote Address: The resilient leader- Cultivating inner stability in the face of adversity

**Dabinder Hutchinson**, CFO, **National Trust**

### 10:10 Panel: Jumping global ESG hurdles and meeting investor demands

- Is the pace of change towards sustainable investing practices in private markets on track?
- What are the current challenges faced under SFDR?
- How do CFOs approach the unique challenges which investment funds face with limited ESG data?
- Are there enough ESG standards & metrics?



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

Moderator: **Maxim Olliver**, ESG Director, **Northleaf Capital**  
Panellists: **Rhonda Nicoll**, CFO & Head of ESG, **Soho Square Capital**  
**Anne Sheedy**, CFO & ESG Advisor, **Bowmark Capital**

10:55      **Networking coffee break**

## 11:25      **In-Focus Fireside chat: The rise of co-investments**

- What's shaping the growing use and future of co-investments?

Moderator: **Adam Le**, Senior editor, EMEA, **PEI Group**  
Panellists: **Gaurav Saxena**, CFO, **Fremman Capital**  
**Richard Kirkby**, CFO, **Veld Capital**

## 11:50      **Panel: Managing Cybersecurity risks and IT infrastructure**

- How are private funds getting DORA compliant?
- Cybersecurity metrics when integrating a new tool: key risks & what is important to know?
- How is artificial intelligence being used to improve cybersecurity tools?
- Prevention of the cyber threat: does the responsibility extend across the enterprise?
- What are today's threats and how are firms responding?

Panellists: **Christian Scott**, Managing Director of Cybersecurity, **Abacus Group**  
**Ash Patel**, Director of IT and Head of Cyber, **ECI Partners**

12:30      **Networking Luncheon**

## 13:30      **Breakout sessions I**



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

## Track A

### Panel: Key Compliance and Enforcement Considerations

- Most typical / frequent cases regarding compliance & enforcement for investment funds
- Difference of levels of non-compliance: GP (eg SFDR regulating GP) vs LP requirements (eg Art 4 SFDR)
- ESG requirements (SFDR, CSRD, Taxonomy) - legal consequence of non-compliance?
- Other requirements driven by LP (e.g. Solvency 2 or CRR reports) and dealing with grey areas / interpretation.

Moderator: **Jegor Tokarevich**, CEO, **SO** (Substance Over Form Ltd.)

Panellists:

**Haris Vrahliotis**, Compliance Director, **TowerBrook Capital Partners**

**Elliot Stevens**, General Counsel & Chief Compliance Officer, **Campbell Lutyens**

**Luca Braulin**, Head of Legal, Compliance and AML, **Ambienta**

## Track B

### Panel: Fund formation and structuring trends

- Impact of the rise in demand for semi-liquid and evergreen products
- Overcoming challenges from non traditional fund structures
- Structural limitations of evergreen funds and their potential for committed ticket solutions
- Challenges and experiences when marketing alternative investment funds in Europe and cross-border

Moderator: **David Sarfas**, Co-Head of Fund Solutions, **CSC**

Panellists:

**Christophe Tasiaux**, Funds CFO, **Kartesia**

**Adrian Lüönd**, Head of Finance and Corporate Operations, **SUSI Partners**

14:05

Breakout sessions II



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

## Track A

### Panel: Fund Finance: Navigating the growing Subscription Financing and NAV Loan markets

- How have increasing rates affected the implementation and utilisation of Sub-lines and NAV loans
- Is the market limited to funds of a certain size?
- How do sustainability practices apply to subscription and NAV financing?
- What have been the key changes in the Sub-line market and how is the macro environment driving this change?
- Sub-lines have become a more strategic product for GPs – what solutions are available to GPs across their fund life cycle?
- What are the constraints in the market influencing fund financing and how is this changing the landscape of lenders?

Moderator: **Kevin Hogan**, Group Head of Private Credit,

**Aztec Group**

Panellists:

**Emad Shahin**, Partner, **17 Capital**

**Slade Spalding**, Founding Partner, **No Limit Capital (NLC)**

**Kenny Miller**, CFO, **FPE Capital**

## Track B

### Panel: Navigating fundraising challenges in an inflationary climate

- What are the different types of structures to secure capital and how is this evolving?
- Accessing DC/401k capital?
- Impact of fundraising headwinds on the operational side of fund management
- Expanding and managing fundraising efforts across the globe
- How has a tight fundraising environment impacted the power dynamic between LPs and GPs at the negotiating table e.g. key person clauses pressure

14:40

Breakout sessions III

## Track A

### Panel: Adapting to new technology and AI

- How are funds embracing generative AI systems to increase operational efficiency?
- What's the next phase of technology integration within private market funds?
- How can CFOs build the optimal tech and operational structure to meet their firm's most pressing needs?

Moderator: **Vera Huang**, Head of Data Solutions, **IQ-EQ**

## Track B

### Panel: Good practices in Liquidity and Funding Risk Management

- Key frameworks to manage liquidity risk
- What is the best approach in managing currency exchange rate risks with evolving FX markets?

Panellists:

**Kyri Yiannakis**, Head of EMEA, **Hazeltree**



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)



# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

**Panellists:**

**Timothy Buchner**, Managing Director, Private Markets,  
**State Street**

**Steven Dunne**, Senior Partner & CFO, **Frog Capital**

**Chaim Langer**, Chief Operating Officer, Vintage Funds,  
**Goldman Sachs Asset Management**

**15:15**      **Networking coffee break**

**15:45**      **Interactive Workshops**

**Enhancing operational efficiency through target operating models**

- How to link transformation with target operating model aims
- Key operating model challenges in private markets
- How do private market managers involve their operating models in an ever increasing complex environment
- Navigating and designing a operating model that is the foundation of the business
- Mapping out end to end value claim
- How do you create something to scale

**Valuations in alternative assets**

- Why should GPs consider third-party valuation in alternative assets?
- How can managers demonstrate the right oversight when it comes to private markets?
- Best approach to deal with the regulatory scrutiny on valuations.
- How do you have true independence when it's an inhouse valuation?
- How do valuations differ across different markets/regions?

**Operational Due diligence 101**

- What approaches should be taken when conducting Financial Due Diligence?
- What happens when the data is limited?
- Challenges and practical examples.



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

- How to access data at the portfolio, fund and client level and manipulate to suit stakeholder needs – is there a scalable solution? The impact of data strategies on the CFO/COO functions? Overlay of AI?
- Case study example

*Co-Facilitated by:*

**Sahem Gulati**, Head of Strategy & Consulting, **M&G**

**Patrick Spicer**, VP, Senior Principal Solution Architect, **Arcesium**

**Ankit Verma**, Finance Director, **Exponent Private Equity**

*Co-Facilitated by:*

**Roland Graaf**, CFO, **Bencis Capital Partners**

**Stephen Campion**, Head of Finance, **NTR**

*Co-Facilitated by:*

**16:40**      **Networking reception**

**Day 2:**      14 November, 2023

**8:00**      **Registration & Coffee**

**8:40**      **CFOs & COOs think tanks (GPs only)**

*Our series of GP think tanks provide a space for CFOs/COOs to share and learn from their personal experiences on a Chatham House basis. An open arena to discuss a range of issues with peers from your asset class such as financial terms, service providers plus more.*

**Private equity & Venture  
Capital**

**Private Debt**

*Facilitated by Paul  
**Bramley**, CFO & Operating  
Partner, **Claret Capital  
Partners***

**Infrastructure**

*Facilitated by **Louise Jack**,  
COO, **LPPI***

**Real estate**

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

**9:25**      **Chairperson's day 2 welcome remarks**



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

## 9:30 Panel: Benchmarking and Performance measurement

- How do you undertake like for like benchmarking?
- The rise of the PME in benchmarking
- Managing the inherent limitation of benchmarking eg: Preqin data sets, Cambridge Associates

Panellists:

**Dean Horton**, CFO, **Old Mutual Alternative Investments**

## 10:10 PEI Data Presentation

**Evie Taylor**, Senior Research Manager, **PEI**

## 10:20 Debate: Outsource vs insource model challenges

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

Moderator: **William Andreoni**, Partner, Asset Management Financial Consulting Leader, **RSM**

**Tom Seymour-Mead**, CFO, **Signal Capital Partners**

## 11:00 Networking coffee break

## 11:30 Panel: Building the right firm culture and managing the ever-increasing value of human capital

- How to attract talent and keep talent?
- What are GPs doing to win the right people?
- Building the right culture in an organisation
- How to ensure diversity of thought, background, culture to drive a high performing team?
- How to reflect DE&I in senior hires?
- How is the operating environment for GPs impacting the types of skills firms are looking for in relation to finance recruits?
- How are firms taking into account cultural and generational differences in the workforce?

Moderator: **Stuart Paterson**, Director, **Allbyn**

Panellists:

**Marion Buten**, COO Europe - BXCI PCS Europe, **Blackstone**

**Tina Page**, COO, **Atempo Growth**

**George Velikov**, Partner & Chief Operating Officer, **Cordet Capital Partners**

**Frédéric Brodach**, Managing Director, CFO, **RSI Capital GmbH**



For program information:  
**Hannah Ogun**  
[hannah.o@pei.group](mailto:hannah.o@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

# Europe Forum

13 - 14 November 2024,  
Sofitel London St James, London

12:10

## Lessons learned: Building and scaling a good organisation

- How to find the right strategy and the right niche?
- Key scalability and organisational requirements
- How are GPs adhering to global corporate governance
- How to ensure diversity of thought, background, culture to drive a high performing team?
- Post merger motivation?
- Incentive schemes

**Moderator: Graham Bippart, Editor, PEI Media**

**Panellists:**

**Paul Bramley, CFO & Operating Partner, Claret Capital Partners**

**Alex Goodway, CFO, Dawn Capital**

**Zulfi Ali, COO / Chief Risk Officer, Zetland Capital Partners**

12:40

**Networking Lunch**



For program information:  
**Kellie Green**  
[Kellie.g@pei.group](mailto:Kellie.g@pei.group)

For sponsorship opportunities:  
**Josh Stoller**  
[joshua.s@pei.group](mailto:joshua.s@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)