

# 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**

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

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

### 10:10 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?



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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?
- How is the highly competitive environment impacting new and emerging managers getting their operations off the ground?

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**

12:30      **Fireside chat: The rise of impact-linked carry**

- How do CFOs view the value of impact linked carry?
- Should a portion of carried interest be linked to impact performance and why?
- How are GPs implementing this mechanism?

12:55      **Networking Luncheon**

13:55      **Breakout sessions I**



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## Track A

### **Panel: Key Compliance and Enforcement Considerations**

- Frequent compliance issues in the private fund area
- Best practices and policies against the backdrop of evolving regulatory and enforcement concerns.
- Impact of democratisation of private markets on regulatory scrutiny
- How are GPs approaching SEC and global regulatory reporting requirements and updates to policies?

Panellists:

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

## 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**

**14:30**

**Breakout sessions II**

## Track A

### **Panel: Fund Finance and the growing market for NAV loans**

- With rising rates and increasing implementation costs are investors turning against nav financing and long dated facilities?
- Is the market limited to funds of a certain size?
- How do sustainability practices apply to NAV financing?
- Setting up multi strategy and multi jurisdiction/ expanding into asset classes and new geographies

Panellists:

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

**15:05**

**Breakout sessions III**



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## 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**

Panellists:

## 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**

**Chaim Langer**, Chief Operating Officer, **Vintage Funds**,

**Goldman Sachs Asset Management**

15:40      **Networking coffee break**

## 16:10      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

### Valuations in alternative assets

- Why should GPs consider third-party valuation in alternative assets
- FCA Letter to investment managers – to the asset manager community
- How managers can demonstrate the right oversight when it comes to private markets in
- Dealing with the regulatory scrutiny on valuations

### 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.



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- Mapping out end to end value claim
- How do you create something to scale
- 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
- How do you have true independence if its internal- should you consider
- How do valuations differ across different markets/regions

*Co-Facilitated by:*

**Sahem Gulati**, Head of Strategy & Consulting, **M&G**  
**Patrick Spicer**, VP, Senior Principal Solution Architect, **Arcesium**

*Co-Facilitated by:*

**Roland Graaf**, CFO, **Bencis Capital Partners**  
**Stephen Campion**, Head of Finance, **NTR**

*Co-Facilitated by:*

**17:00**      **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**

**Private Debt**

**Infrastructure**

**Real estate**

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

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



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

**9:30**      **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: Prequin data sets, Cambridge Associates

**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?

**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?

**Panellists:**

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

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

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



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12:10

## Lessons learned: Building and scaling a good organisation (LP vs. GP view)

- 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

### Panellists:

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

**Alex Goodway**, CFO, **Dawn Capital**

12:40

## Networking Lunch



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