

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?



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

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**



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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



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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: Aztec

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**

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



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Timothy Buchner, Managing Director, Private Markets,
State Street

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

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.



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- 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**



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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**



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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

12:40

Networking Lunch



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