

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.)

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?

10:55 Networking coffee break



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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

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

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**

Co-Facilitated by:

17:00 **Networking reception**

Day 2: 14 November, 2023

8:00 **Registration & Coffee**

8:45 **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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9:30 **Chairperson's day 2 welcome remarks**

9:40 **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

10:20 **PEI Data Presentation**

Evie Taylor, Senior Research Manager, PEI

10:35 **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?

11:15 **Networking coffee break**

11:50 **In-Focus Fireside chat: Will GP Led secondaries become the 'new normal'?**

- How is this market moving forward in the new age of fewer exit possibilities & higher interest rates
- Why are LPs starting to show more interest in GP stakes?

12:10 **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?



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Panellists:

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

Tina Page, COO, **Atempo Growth**

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

12:40

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**

13:10

Interactive roundtable discussions over Lunch



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