

EUROPEAN COO/CFO SUMMIT

EVENT AGENDA

Wednesday 2 September

- 10:30 Dedicated Networking Time
- 10:50 Opening Address
James Williams, Managing Editor, Private Equity Wire
- 11:00 **Panel 1 - Succession Planning**
- As PE groups adjust to generational change and think about succession planning, what are the key considerations before selling GP equity stakes?
 - How should COOs/CFOs determine carry interest rights for newly appointed partners, to prevent talent leakage?
 - Selling GP stakes to institutional investors during Covid-19 – what should CFOs be mindful of, to avoid potential conflicts?
 - What are best practices around management company governance to address ownership, admittance of new partners, voting and allocation of income?
 - How should your management company governing documents address partner death, disability, disagreement, and disinterest? Have you developed a firm valuation methodology, secured appropriate insurance, addressed vesting, non-complete, non-disclosure and non-solicitation?
- Jean-François Le Ruyet**, Partner, Quilvest Private Equity
Anthony Mascalco, Managing Partner, Investcorp
Andrew Bentley, Partner, Campbell Lutyens
James Williams, Managing Editor, Private Equity Wire (moderator)
- 11:50 Sponsor Presentation #1 - The Present Future: Adapting to today's digital fundraising environment
Drake Paulson, Senior Director, eVestment Private Markets
- 12:10 **Panel 2: Operational Due Diligence... new trends and challenges**
- How is the ODD process evolving in line with technology innovation?
 - What new tactics are COOs deploying to improve ODD?
 - Implementing best practices in response to rising LP expectations
- Tim Wainwright**, Partner, Eight Advisory UK
Sebastian Junoy, Co-Founder & Partner, Headway Capital Partners
James Williams, Managing Editor, Private Equity Wire (moderator)
- 13:00 Floor Opens - Dedicated Networking Time
- 13:20 **Panel 3 - Technological Impact**
- How are technology advances helping improve COOs/CFOs monitor the performance of portfolio companies, both at the pre-deal stage and during the life of the investment?
 - In what ways is technology helping speed up deal origination and help identify new target opportunities?
 - What potential do COOs see in new technology tools (analytic tools, reporting tools) to improve compliance and data security in their own firms, and in their underlying portfolio companies?
 - How might blockchain tools help COOs verify asset valuations, improve cash flow management, waterfall distributions?
- George Ralph**, Managing Director, RFA
Paul Winter, COO, Moghrabi Family Office
Drake Paulson, Senior Director, eVestment Private Markets
Adrian Neilan, COO & Investment Director, Deepbridge Capital
André Pienaar, Chief Executive and Founder, C5 Capital
- 14:10 Floor Opens - Dedicated Networking Time
- 15:00 Day 1 Concludes

Thursday 3 September

- 10:30 Dedicated Networking Time
- 11:00 **Panel 4 - Evolving the PE Operating Model**
- What new tactics/tools are COOs adopting to support the investment management team to create value in the Fund?
 - What metrics are COOs using to measure the impact of operating partners on company performance?
 - Looking for new ways to build greater synergy between the internal fund team and external advisors
 - Why effective communication with advisors/operating partners can improve long-term performance – examples/insights...?
 - How might the COO role evolve over the coming years?
- Paulina Pietkiewicz**, Partner and CCO, Abris Capital
Parag Gandesha, Partner, Kreos Capital
Robert Shaw, Partner & CFO, Apera Asset Management
James Williams, Managing Editor, Private Equity Wire (moderator)
- 11:50 Sponsor Presentation #1 - Evolution in Legal Spend by Private Equity Firms
Oliver Cardozo, Director of Business Development, Apperio
- 12:10 **Panel 5 - Operational Impact**
- How are PE groups measuring the impact of ESG on their fund portfolios?
 - What do success factors or KPIs look like - still in the early ages of completing that work?
 - What systems/operational changes do COOs need to think about to improve the ESG credentials of their funds and their own management companies?
 - Changing LP expectations – how are GPs responding to demands for greater transparency and better knowledge transfer as investors increase their focus on ESG investing?
- Elin Ljung**, Director of Sustainability & Communications, Nordic Capital
Alexandra Daly, Founder & CEO, AA Advisors (moderator)
Egle Sakalauskaitė, Vice President, Bregal Investments
Martin Scott, Head of Client Services, Guernsey, at Sanne Group
Kate Hodson, Partner & Head of ESG Funds, Ogier
- 13:00 Sponsor Presentation #2 - Guernsey's fund product in the green, ESG and sustainable finance space
Dr Andy Sloan, Deputy Chief Executive, Strategy, at Guernsey Finance
- 13:20 **Panel 6 - Outlook on 2020/21**
- What will the PE firm of 2021 look like? Reassessing structure, culture, environment, processes, risk.
 - New team paradigms – how has the pandemic impacted the management and collaboration of your team
 - Building an infrastructure and reporting process to support your internal partners and LPs in a post-Covid environment
- Neil Cooper**, CFO, Abingworth
Hervé Descazeaux, Managing Partner and CIO, Cathay Capital
Neil Brown, Chief Risk Officer, Earth Capital
James Williams, Managing Editor, Private Equity Wire (moderator)
- 14:10 Closing Address
James Williams, Editor in Chief, Private Equity Wire
- 14:20 Floor Opens - Dedicated Networking Time
- 15:00 Event Concludes

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