

### Registration and welcome coffee

08:20 - 09:00

### Chair's welcome address

09:00 - 09:05  
Plenary Sessions

### Participants

**Chair: Romulad Beneche** - US Director, AIMA

### Cyber threat landscape – working with law enforcement

09:05 - 09:45  
Plenary Sessions

### Participants

**Speaker: Matthew Osegard** - Supervisory Special Agent, Squad CC-6 (Cyber crimes, Cyber Task Force), FBI Chicago

### The SEC Private Funds Advisor Rules: key priorities

09:45 - 10:30  
Plenary Sessions

An update of where we are now.

### Participants

**Moderator: Melissa Gainor** - Partner, Kirkland & Ellis LLP

**Panellist: Joann Harris** - Firm Partner and Chief Compliance Officer, TPG

**Panellist: Chris Iorillo** - Chief Financial, Legal and Compliance Officer, Freeman Spogli

### The unseen risks: what Tipper X teaches us about compliance blind spots

10:30 - 11:00  
Plenary Sessions

Lessons for private equity firms now

### Participants

**Speaker: Tom Hardin** - Owner, Tipper X Advisors LLC

**Speaker: Steven Schwab** - Senior Director, General Counsel and Chief Compliance Officer, Thoma Bravo

### Morning coffee and networking break

11:00 - 11:30  
Networking

### Integration of AI in private equity: the potential to revolutionize

11:30 - 12:15  
Plenary Sessions

- Who are the early adopters and how can firms optimise AI to scale?
- In what ways can GPs leverage AI to strengthen their relations with investors and navigate potential risks?

### Participants

**Panellist: John Jacobs** - Chief Compliance Officer, Deputy General Counsel and Managing Director, Gryphon Investors

**Panellist: Abhishek Sinha** - CEO & CIO, Nelumbium Capital

**Panellist: Eric Levin** - Chief Technology Officer, GCM Grosvenor

### Tech showcases

12:15 - 13:00  
Plenary Sessions

Service providers will have 10 minutes to make a solo presentation to showcase their best-in-class product offering.

Followed by Q&A.

### Participants

**Michael Basen** - Executive Vice President, Director, Alternative Funds Group, BankUnited

**Rochelle Glazman** - VP Head of Product Marketing, Arcesium

### Networking lunch

13:00 - 14:05  
Networking

### CFO/COO only - Invite-only lunch

13:00 - 14:05  
CFO/COO only - Invite-only lunch

Places limited to 30. Places are reserved for CFO/COO/CCO/CTO/CROs from GP companies only

Please contact Adrianna to register, [adrianna.moskal@informa.com](mailto:adrianna.moskal@informa.com)

### The SEC Private Funds Advisor Rules: timelines, challenges, and practical implementation

14:05 - 14:50  
Stream A: Regulation, reporting and compliance

- Hear how LPs and GPs are preparing for the changes

### Participants

**Moderator: Suzan Rose** - Senior Adviser, Government and Regulatory Affairs, AIMA

**Panellist: James Gaven** - General Counsel and Chief Compliance Officer, SK Capital Partners

**Panellist: Mark Barham** - Chief Administrative and Chief Compliance Officer, Flexpoint Ford

**Panellist: Andrew Spring** - Managing Director and CFO, MidOcean Partners

### A-Z of industry pain points: what's the playbook for GPs?

14:05 - 14:50  
Stream B: C-suite boardroom sessions Run strictly under The Chatham House Rules Places limited

- What are the solutions?

### Participants

**Discussion Leader: Stella Ho** - Partner, Chief Financial Officer, Chief Compliance Officer & Head of Business Operations, LightBay Capital

**Discussion Leader: Lily Hou** - Director of Operations, Architect Capital

### The ever-evolving role of a C-suite leader: secrets to C-suite success

14:50 - 15:35  
Stream A: Regulation, reporting and compliance

- How many hats does the CFO/COO/CCOs wear and what are the latest ones added to the wardrobe?
- Cross collaboration and who owns what risk?

### Participants

**Panellist: Judy Yuan** - Chief Operating Officer and General Counsel, Sentinel Global

**Panellist: William Newbrander** - Partner and CFO, Osceola Capital Management

**Panellist: Brian Smith** - Partner, CFO and COO, Multico Capital

**Moderator: Vinay Bantu** - CEO, YMY Capital

### How to strengthen the ODD function to build and maintain better relationships with managers?

14:50 - 15:35

Stream B: C-suite boardroom sessions Run strictly under The Chatham House Rules Places limited

*Run strictly under The Chatham House Rule, and open to pre-registered CFOs, COOs, CCOs, CROs & CTOs. Places are limited. To register please email [Adrianna.moskal@informa.com](mailto:Adrianna.moskal@informa.com)*

#### Participants

**Discussion Leader: Robert Adler** - CFO & COO, Azimut Alternative Capital Partners

**Discussion Leader: Yonatan Sinuany** - CFO, Vintage Investment Partners

### Afternoon refreshments and networking break

15:35 - 16:05

Networking

### Getting it right first time: reporting best practices

16:05 - 16:50

Stream A: Regulation, reporting and compliance

- Rising expectations, ease of reporting burdens, data fragmentation and reassuring investors.
- How do you manage it all?

#### Participants

**Panellist: Ryan Cowles** - Managing Director, Co - Head of Fund Accounting & Operations, Warburg Pincus

**Moderator: Vinay Bantu** - CEO, YMY Capital

**Panellist: Stephanie Smith** - Global Chief Operating Officer, Equity Private Markets, BlackRock

### Troubleshooting technology risk

16:05 - 16:50

Stream B: C-suite boardroom sessions Run strictly under The Chatham House Rules Places limited

- How are CTOs and COOs managing technology risk in an ever-changing landscape?

#### Participants

**Nicholas Platt, Jr.** - Partner and co-founder, Kudu Investment Management, LLC

**Imran Shaikh** - Chief Technology Officer, Shore Capital Partners

### People risk and compliance

16:50 - 17:30

Stream A: Regulation, reporting and compliance

- How are CCOs mitigating malpractice, insider trading and avoiding reputational damage within their organisations?

#### Participants

**Speaker: Lindsay Antonello** - Managing Director and Deputy Chief Compliance Officer, TPG

**Speaker: James Gaven** - General Counsel and Chief Compliance Officer, SK Capital Partners

### How can C-suite professionals foster better relations with regulators and LPs?

16:50 - 17:35

Stream B: C-suite boardroom sessions Run strictly under The Chatham House Rules Places limited

- What needs to change?

#### Participants

**Discussion Leader: Gerry Esposito** - Partner, CFO & CCO, Newbury Partners

**Discussion Leader: John Beczak** - Chief Financial Officer, Resource Capital Funds

### Evening drinks reception

17:35 - 18:30

Networking

### End of main conference day one

18:30 - 18:35

# SCHEDULE

MAIN CONFERENCE DAY 1 - 06/05/2024

SuperReturn CFO/COO North America

May 6-7, 2024  
Intercontinental Chicago Magnificent Mile  
Chicago

TIME	PLENARY SESSIONS	NETWORKING	CFO/COO ONLY - INVITE-ONLY LUNCH	STREAM A: REGULATION, REPORTING AND COMPLIANCE	STREAM B: C-SUITE BOARDROOM SESSIONS RUN STRICTLY UNDER THE CHATHAM HOUSE RULES PLACES LIMITED
08:00	08:20 - Registration and welcome coffee	08:20 - Registration and welcome coffee	08:20 - Registration and welcome coffee	08:20 - Registration and welcome coffee	08:20 - Registration and welcome coffee
09:00	09:00 - Chair's welcome address 09:05 - Cyber threat landscape – working with law enforcement 09:45 - The SEC Private Funds Advisor Rules: key priorities				
10:00	10:30 - The unseen risks: what Tipper X teaches us about compliance blind spots				
11:00	11:30 - Integration of AI in private equity: the potential to revolutionize	11:00 - Morning coffee and networking break			
12:00	12:15 - Tech showcases				
13:00		13:00 - Networking lunch	13:00 - CFO/COO only - Invite-only lunch		
14:00				14:05 - The SEC Private Funds Advisor Rules: timelines, challenges, and practical implementation 14:50 - The ever-evolving role of a C-suite leader: secrets to C-suite success	14:05 - A-Z of industry pain points: what's the playbook for GPs? 14:50 - How to strengthen the ODD function to build and maintain better relationships with managers?
15:00		15:35 - Afternoon refreshments and networking break			

# SCHEDULE

MAIN CONFERENCE DAY 1 - 06/05/2024

SuperReturn CFO/COO North America

May 6-7, 2024  
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TIME	PLENARY SESSIONS	NETWORKING	CFO/COO ONLY - INVITE-ONLY LUNCH	STREAM A: REGULATION, REPORTING AND COMPLIANCE	STREAM B: C-SUITE BOARDROOM SESSIONS RUN STRICTLY UNDER THE CHATHAM HOUSE RULES PLACES LIMITED
16:00				<p>16:05 - Getting it right first time: reporting best practices</p> <p>16:50 - People risk and compliance</p>	<p>16:05 - Troubleshooting technology risk</p> <p>16:50 - How can C-suite professionals foster better relations with regulators and LPs?</p>
17:00		17:35 - Evening drinks reception			
18:00	18:30 - End of main conference day one	18:30 - End of main conference day one	18:30 - End of main conference day one	18:30 - End of main conference day one	18:30 - End of main conference day one

### Welcome coffee

08:20 - 08:55

### Chair's welcome address

08:55 - 09:00  
Plenary Sessions

### Participants

**Chair: Romulad Beneche** - US Director, AIMA

### Higher-for-longer and private fund fees

09:00 - 09:20  
Plenary Sessions

- Macro's effect on fundraising and deal flow
- Anticipated changes in expenses
- Fees and sources of revenue

### Participants

**Brigid Connor** - AVP, Fees Research Lead, Preqin

### Market volatility: liquidity, valuations, and the cost of capital

09:20 - 10:00  
Plenary Sessions

- How are CFOs and COOs navigating through uncertainty and measuring liquidity?
- How are they going to adjust valuations in light of debt flows?

### Participants

**Moderator: Brian Garfield** - Managing Director, Lincoln International LLC

**Panellist: Dina Colombo** - Partner, COO & CFO, GreyLion Partners

**Panellist: Chaim Langer** - Managing Director, External Investing Group (XIG) and Chief Operating Officer of Vintage Strategies, Goldman Sachs Asset Management

**Panellist: Travis Krueger** - Managing Director, GTCR

**Panellist: Brian Dunford** - Senior Vice President and Head of Valuations, Thoma Bravo

### Lessons learned from the White House and qualities of excellent leadership

10:00 - 10:30  
Plenary Sessions

### Participants

**Susan Sher** - Former Chief of Staff to First Lady Michelle Obama; First Female Corporation Counsel for the City of Chicago, University of Chicago

### Leveraging data & efficient reporting in the middle and back-office

10:30 - 11:00  
Plenary Sessions

- Using data for effective decision making: how do you source, prioritise and create the necessary reports?

### Participants

**Speaker: Dan Rochkind** - CFO, Lerer Hippeau

**Speaker: Carlos Calderon** - Senior Vice President and Chief Financial Officer, Ariel Investments

### Morning coffee and networking break

11:00 - 11:30  
Networking

### What do LPs want and what do GPs need to know?

11:30 - 12:15  
Plenary Sessions

- Enhancing the relationship with GPs, increasing transparency, and mitigating risk
- What more can be done?

### Participants

**Panellist: Ashley Roche** - Chief Operating Officer, General Counsel, MEMCO

**Panellist: Chris Iorillo** - Chief Financial, Legal and Compliance Officer, Freeman Spogli

**Panellist: Jessie Juan** - Co-Founder and Partner, Quantum

**Moderator: Joshua Cherry-Seto** - Partner & CFO, StartUp Health

### The state of fundraising: trends, challenges, and solutions

12:15 - 13:00  
Plenary Sessions

- How are today's leading CFOs and COOs maintaining consistency and profitability in an industry that is cyclical at its core?
- How are they mitigating the risks associated with current market pressures, crucial investment decisions, ever-changing fundraising dynamics, and evolving capital structures?

### Participants

**Panellist: Darren Herz** - Chief Financial Officer, Goldner Hawn

**Panellist: Eva Hubsman** - Partner and CFO, Israel Secondary Fund

**Panellist: Amy Persohn** - Chief Operating Officer, Navitas Capital

**Moderator: Amy Rubenstein** - CEO, Clear Investment Group

### Networking lunch

13:00 - 14:05  
Networking

### Roundtable Discussions

13:00 - 14:05

Roundtable Discussions - First come first served basis

**Roundtable 1: Voices in VC:** What obstacles are the venture capital CFOs and COOs facing in today's market?

#### Roundtable 2: Success in the secondaries space

To what extent is investing in the secondaries market a smart choice? Why are firms embracing continuation vehicles as exit alternatives? What do the next few years look like for private credit secondaries?

#### Roundtable 3: Disruption of the banking system and what this means for PE?

#### Roundtable 4: It's not black and white – managing conflicts of interest

### Participants

**Table 1: Joshua Cherry-Seto** - Partner & CFO, StartUp Health

**Table 2: Chaim Langer** - Managing Director, External Investing Group (XIG) and Chief Operating Officer of Vintage Strategies, Goldman Sachs Asset Management

**Table 3: John Beczak** - Chief Financial Officer, Resource Capital Funds

**Table 4: Ashley Roche** - Chief Operating Officer, General Counsel, MEMCO

### How to use AI for greater efficiencies

14:05 - 14:45

Stream A: Operations, costs, and due diligence

- What are the associated risks of AI tools?

### Participants

**Speaker: Ayesha Kiani** - COO, MNNC Group

**Speaker: Matt Schaefer** - Chief Operating and Financial Officer, AIR Asset Management

### Impact Investing – a tale of 2 approaches

14:05 - 14:45

Stream B: C-Suite Boardroom Sessions: Growth, human capital and retaining talent

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### Participants

**Discussion Leader: Sunil Rao** - COO, SVP of Finance, Plum Alley

**Discussion Leader: Catherine Colyer** - COO, WaterEquity

### Outsourcing and vendor selection – getting the best returns

14:45 - 15:25

Stream A: Operations, costs, and due diligence

- How do GPs identify service providers for all portfolios

### Participants

**Panellist: Peter Tang** - Chief Financial Officer (CFO) and Managing Director, Butterfly Equity

**Panellist: Jameson Greenfield** - Chief Financial Officer, State of Wisconsin Investment Board

**Panellist: Jackie Dao** - CFO, Reach Capital

**Panellist: Olibia Stamatoglou** - Managing Director, Chief Financial Officer & Chief Compliance Officer, Victory Park Capital Advisors, LLC

**Moderator: Bessie Wu** - CFO, NewView Capital

### Capital raising and building scale

14:45 - 15:25

Stream B: C-Suite Boardroom Sessions: Growth, human capital and retaining talent

- What are people doing from a liquidity perspective?
- What are LPs' obligations?

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### Participants

**Discussion Leader: Amy Rubenstein** - CEO, Clear Investment Group

**Mr Steven Ernest** - Vice President, Originations, Chicago Atlantic

### Three key trends impacting fund finance

15:25 - 16:05

Stream A: Operations, costs, and due diligence

- NAV financing as a key area and how to realize its value

### Participants

**Speaker: Dadong Yan** - Head of Portfolio Finance, Managing Director, Barings

**Speaker: Aaron Simkovich** - Managing Director- CFO, Maranon Capital, L.P.

### Migration of talent across PE

15:25 - 16:05

Stream B: C-Suite Boardroom Sessions: Growth, human capital and retaining talent

- What tools are CFOs and COOs using to attract long term talent?
- What operational changes are being made?

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### Participants

**Discussion Leader: Susan Black-Beth** - Chief Operating Officer, Avante Capital Partners

**Discussion Leader: Stephanie Smith** - Global Chief Operating Officer, Equity Private Markets, BlackRock

### Chair's closing remarks and end of SuperReturn CFO/COO North America 2024

16:05 - 16:10

### Participants

**Chair: Ayesha Kiani** - COO, MNNC Group

# SCHEDULE

MAIN CONFERENCE DAY 2 - 07/05/2024

SuperReturn CFO/COO North America

May 6-7, 2024  
Intercontinental Chicago Magnificent Mile  
Chicago

TIME	PLENARY SESSIONS	NETWORKING	ROUNDTABLE DISCUSSIONS - FIRST COME FIRST SERVED BASIS	STREAM A: OPERATIONS, COSTS, AND DUE DILIGENCE	STREAM B: C-SUITE BOARDROOM SESSIONS: GROWTH, HUMAN CAPITAL AND RETAINING TALENT
08:00	08:55 - Chair's welcome address 08:20 - Welcome coffee	08:20 - Welcome coffee	08:20 - Welcome coffee	08:20 - Welcome coffee	08:20 - Welcome coffee
09:00	09:00 - Higher-for-longer and private fund fees 09:20 - Market volatility: liquidity, valuations, and the cost of capital				
10:00	10:00 - Lessons learned from the White House and qualities of excellent leadership 10:30 - Leveraging data & efficient reporting in the middle and back-office				
11:00	11:30 - What do LPs want and what do GPs need to know?	11:00 - Morning coffee and networking break			
12:00	12:15 - The state of fundraising: trends, challenges, and solutions				
13:00		13:00 - Networking lunch	13:00 - Roundtable Discussions		
14:00				14:05 - How to use AI for greater efficiencies 14:45 - Outsourcing and vendor selection – getting the best returns	14:05 - Impact Investing – a tale of 2 approaches 14:45 - Capital raising and building scale
15:00				15:25 - Three key trends impacting fund finance	15:25 - Migration of talent across PE

# SCHEDULE

MAIN CONFERENCE DAY 2 - 07/05/2024

SuperReturn CFO/COO North America

May 6-7, 2024  
Intercontinental Chicago Magnificent Mile  
Chicago

<b>TIME</b>	<b>PLENARY SESSIONS</b>	<b>NETWORKING</b>	<b>ROUNDTABLE DISCUSSIONS - FIRST COME FIRST SERVED BASIS</b>	<b>STREAM A: OPERATIONS, COSTS, AND DUE DILIGENCE</b>	<b>STREAM B: C-SUITE BOARDROOM SESSIONS: GROWTH, HUMAN CAPITAL AND RETAINING TALENT</b>
<b>16:00</b>	<b>16:05</b> - Chair's closing remarks and end of SuperReturn CFO/COO North America 2024	<b>16:05</b> - Chair's closing remarks and end of SuperReturn CFO/COO North America 2024	<b>16:05</b> - Chair's closing remarks and end of SuperReturn CFO/COO North America 2024	<b>16:05</b> - Chair's closing remarks and end of SuperReturn CFO/COO North America 2024	<b>16:05</b> - Chair's closing remarks and end of SuperReturn CFO/COO North America 2024