

### Registration and welcome coffee

08:30 - 09:00

Networking

### Chair's welcome address

09:00 - 09:05

Main Conference Day 1 Plenary

### Participants

**Chair: Marion Michael** - CFO, Stage Capital

### The big picture: what is here to stay?

09:05 - 09:40

Main Conference Day 1 Plenary

What are the major lessons learned by CFOs and COOs surrounding the virtual shift? Evaluating the pros and cons of digital due diligence and fundraising. How have CFOs/COOs bridged the distance and maintained strong LP/GP relationships and communication? Looking ahead, what trends will remain post-pandemic?

### Participants

**Rahul Manvatkar** - Investment Funds Partner, Linklaters

**In conversation with: Kevin Early** - European CFO, Ares Management

**Andrew Howlett-Bolton** - Managing Director and Chief Financial Officer, EMEA Funds, The Carlyle Group

### Putting sustainability into practice

09:40 - 10:15

Main Conference Day 1 Plenary

In the transition from a 'tick the box' approach, everyone is talking about ESG, but what does it really mean? What are the challenges and best strategy solutions for measuring, reporting and tracking? How to implement ESG into the investment process while balancing financial, environmental and social returns. What does the LP truly want?

### Participants

**Axel Elmqvist** - Sustainability Lead, Verdane

**In conversation with: Mandar Kulkarni** - CFO, Bluewater

**Stephanie Hubold** - Head of ESG, Altor Equity Partners

### Tech showcases

10:15 - 11:15

Main Conference Day 1 Plenary

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

Showcase 1: **Omar Dapul**, *International Head of Solutions Engineering, Allvue Systems*

Showcase 2: **Roger Tomlinson**, *Regional Director – EMEA, EWM Global*

Showcase 3: **Darren Cran**, *COO, AccountsIQ*

Showcase 4: **Gregor Kreuzer**, *CPO & Co-Founder, qashqade*

Showcase 5: **Gareth Hewitt**, *CEO & Co-Founder, LemonEdge*

*Followed by Q&A*

### Participants

**Moderator: Ronald Bell** - Founding Partner and COO, Fremman Capital

**Showcase 1: Omar Dapul** - International Head of Solutions Engineering, Allvue Systems

**Showcase 2: Roger Tomlinson** - Regional Director – EMEA, EWM Global

**Showcase 3: Darren Cran** - COO, AccountsIQ

**Showcase 4: Gregor Kreuzer** - CPO & Co-Founder, qashqade

**Showcase 5: Gareth Hewitt** - CEO & Co-Founder, LemonEdge

### Dedicated networking break

11:15 - 12:00

Networking

### The secondaries space and GP-led deals

11:15 - 12:00

CFO/COO only

#### **Closed door session, CFO/COO only**

What kind of solutions can secondaries offer to GPs? What are the greatest challenges and how have these been overcome?

Run strictly under The Chatham House Rule, what is said in this session cannot be attributed to any individual, encouraging participants to speak openly on the topics that really matter. Closed to Press.

To register for this session, please e-mail [samantha.grannum@informa.com](mailto:samantha.grannum@informa.com)

### Participants

**Discussion Leaders: Jon Freeman** - Partner, Investment, Collier Capital

**Katja Baur** - CFO, Montana Capital Partners

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

### Talking tax

12:00 - 12:20

Main Conference Day 1 Plenary

If you could start with a blank piece of paper with your fund structures and jurisdictions, what would you do? Will the UK's asset holding company regime tempt funds to set up UK holding structures? What about Ireland's new limited partnership and how do you feel about the coming of ATAD III and enhanced substance requirements?

### Participants

**Emily Clark** - Partner/Head of Tax, Travers Smith

**In conversation with: Mark Ingram** - Director - Global Deals Tax, ICG

**Josh Griffin** - Head of Tax, Inflexion

### Reconsidering risk management

12:20 - 12:55

Main Conference Day 1 Plenary

The past year and a half has shown us that risk does not discriminate. In fact, it has taken on a whole new meaning. What makes an effective business continuity plan and how can you approach risk before it approaches you? What are the best strategies to mitigate FX risk?

### Participants

**Ash Hall** - Senior Partner, Alpha FX

**In conversation with: Eva Hubsman** - Partner and CFO, Israel Secondary Fund

**Sally Beh** - Partner, CFO & COO, ACE & Company

### Portfolio company value creation: pulling all the levers

12:55 - 13:30

Main Conference Day 1 Plenary

With ever-evolving supply chains, how can firms continue to pick the right investments? What are the most effective steps to perfecting the monitoring process, enhancing the relationship with portfolio companies, and maximising portfolio performance? What can CFOs and COOs do to support financial and operational safety? How can corporate governance be incorporated to create a value that lasts?

### Participants

**Moderator: Dani Goldsher** - CFO, Triventures

**Panellists: Toine Huijbers** - CFO, DOB Equity

**Gert-Jan Evers** - CFO, Parcom Capital

**Stephanie Hubold** - Head of ESG, Altor Equity Partners

### Networking lunch break

13:30 - 14:30

Networking

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### CFO/COO invite-only lunch

13:30 - 14:30  
CFO/COO only

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### Global regulatory update

14:30 - 15:05  
Main Conference Day 1 Plenary

What is the latest on the regulation scene and what are the changes on the horizon? How will these make a difference to investors in the UK, Europe and the rest of the world? How can fund managers ensure regulatory and tax compliance in a post-Brexit world?

#### Participants

**Moderator: Gurpreet Manku** - Deputy Director General and Director of Policy, BVCA

**Panellists: Raj Hussain** - Managing Director, Global Head of Compliance, CVC Capital Partners

**Jason Kahn** - Senior Vice President, Legal Counsel and CCO, Lexington Partners

**Tom Hodge** - General Counsel & Chief Compliance Officer, Glendower Capital

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### Credit facilities and fund financing

15:05 - 15:40  
Main Conference Day 1 Plenary

With a range of new, tailored liquidity options and facilities available, which fund structures are best? Evaluating the developments and opportunities of NAV and hybrid facilities. What does the future of fund finance look like?

#### Participants

**Moderator: Paul Cunningham** - CFO and Chairman, Helios Investment Partners and IPEV

**Panellists: John Horton** - Finance Director, DN Capital

**Shelley Morrison** - Senior Investment Director - Fund Financing, Aberdeen Standard Investments

**Mandar Kulkarni** - CFO, Bluewater

**Andrew Waldele** - Head of Fund Finance Advisory, Validus Risk Management

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### Dedicated networking break

15:40 - 16:10  
Networking

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### Off the record: Diversity, culture and inclusion: fixing the mix and motivating talent

16:10 - 16:45  
Main Conference Day 1 Plenary

What is driving talent attraction and retention beyond the money, and how do CFOs and COOs move the needle? What are the reporting measures and concrete action points for CFOs and COOs? How to translate and reinforce a culture that is intangible in a remote setting. HR success stories – mental wellbeing and performance.

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Closed to Press.

#### Participants

**Moderator: Diana Meyel** - Managing Partner, CFO/COO, Cipio Partners

**Panellists: Antje Hensel-Roth** - Executive Director and Chief People & External Affairs Officer, ICG

**Hina Ahmad** - Senior Managing Director, COO, Capital Dynamics

**Sally Beh** - Partner, CFO & COO, ACE & Company

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### Off the record: A global mobility guide

16:45 - 17:20  
Main Conference Day 1 Plenary

Exploring the wider repercussions of Covid-19, global mobility and economic substance requirements. What are the challenges and solutions for CFOs and COOs? With an increasingly mobile workforce comes an increase in interaction with multiple tax territories. How to monitor the risks while ensuring cost-effectiveness and tax and regulatory compliance.

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Closed to Press.

#### Participants

**Moderator: Elena Rowlands** - Partner, Travers Smith

**Panellists: Phil Bartram** - Partner, Travers Smith

**Kiran Kular** - Head of Tax, Bridgepoint

**Clare Copeland** - Managing Director, Tax, The Carlyle Group

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### Off the record: The SPACs explosion

17:20 - 17:55  
SPACS and financing

How is the PE industry capitalising on opportunities in this space? How does the UK and EU SPACs market compare to the US, and what are the trends? What measures can be taken to mitigate the risks for investors?

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Closed to Press.

#### Participants

**Discussion Leaders: Raxita Kapashi** - CFO, Dawn Capital

**Chris Bulger** - General Counsel, Vitruvian Partners

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### Off the record: Structure and domicile: finding a home for your fund

17:20 - 17:55  
Regulation, tax and compliance

Discussing the key considerations when structuring a fund. How to select a fund domicile. ATAD II updates- what are the next steps for fund managers? With Ireland and Luxembourg as the popular European domiciles of choice, what are the points to think about when assessing different jurisdiction costs and benefits?

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Closed to Press.

#### Participants

**Discussion Leaders: Diana Meyel** - Managing Partner, CFO/COO, Cipio Partners

**Tom Hodge** - General Counsel & Chief Compliance Officer, Glendower Capital

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### End of main conference day one

17:55 - 18:00  
Networking

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### Main conference day one networking drinks reception

18:00 - 19:30  
Networking

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# SCHEDULE

MAIN CONFERENCE DAY 1 - 21/09/2021

SuperReturn CFO/COO

21 - 22 September 2021  
InterContinental O2  
London

TIME	CFO/COO ONLY	MAIN CONFERENCE DAY 1 PLENARY	NETWORKING	REGULATION, TAX AND COMPLIANCE	SPACS AND FINANCING
08:00			08:30 - Registration and welcome coffee		
09:00		09:00 - Chair's welcome address 09:05 - The big picture: what is here to stay? 09:40 - Putting sustainability into practice			
10:00		10:15 - Tech showcases			
11:00	11:15 - The secondaries space and GP-led deals		11:15 - Dedicated networking break		
12:00		12:00 - Talking tax 12:20 - Reconsidering risk management 12:55 - Portfolio company value creation: pulling all the levers			
13:00	13:30 - CFO/COO invite-only lunch		13:30 - Networking lunch break		
14:00		14:30 - Global regulatory update			
15:00		15:05 - Credit facilities and fund financing	15:40 - Dedicated networking break		
16:00		16:10 - Off the record: Diversity, culture and inclusion: fixing the mix and motivating talent 16:45 - Off the record: A global mobility guide			

# SCHEDULE

MAIN CONFERENCE DAY 1 - 21/09/2021

SuperReturn CFO/COO

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London

TIME	CFO/COO ONLY	MAIN CONFERENCE DAY 1 PLENARY	NETWORKING	REGULATION, TAX AND COMPLIANCE	SPACS AND FINANCING
17:00			17:55 - End of main conference day one	17:20 - Off the record: Structure and domicile: finding a home for your fund	17:20 - Off the record: The SPACs explosion
18:00			18:00 - Main conference day one networking drinks reception		

### Registration and coffee

08:30 - 09:15

Networking

### Chair's opening remarks

09:15 - 09:20

Main Conference Day 2 Plenary

### Participants

**Chair: Roxane Combe** - Business Development Director, IQ-EQ

### Valuations and volatilities

09:20 - 09:55

Main Conference Day 2 Plenary

Exploring the impacts of the pandemic on portfolio company valuations. How have valuation methods changed and are these here to stay? Comparing different methodologies - what works best? How to plan for future volatilities.

### Participants

**Moderator: James Harper** - Finance Manager, Apposite Capital

**Panellists: Klas Tikkanen** - COO, Nordic Capital

**Nick Latner** - Finance Director, HG Capital

**Lance Taylor** - Partner and CFO, HGGC

### Fundraising in 2021 and 2022: the numbers that count

09:55 - 10:10

Main Conference Day 2 Plenary

Latest data insights into fundraising, performance, and forecasts for the year ahead. Analysing investor sentiment in private equity: what are the top strategies and trends across the market?

### Participants

**Kamarl Simpson** - Vice President - Private Capital, EMEA, Preqin

### Top-tier talent management: rewards and recognition

10:10 - 10:45

Main Conference Day 2 Plenary

The importance of Carry and Co-investment schemes as part of an effective remuneration structure. Can firms standardise Carry and Co-Investment structures, data transparency and accessibility? What are the most effective incentive strategies for retaining quality talent? Planning for increased regulation and reporting.

### Participants

**Moderator: Simon Shipgood** - Regional Director, EMEA, EWM Global

**Panellists: Martin Fagerlund** - Partner and COO, Impilo AB

**Adrian Neilan** - COO and Investment Director - Technology, Deepbridge Capital

**Lance Taylor** - Partner and CFO, HGGC

**Gert-Jan Evers** - CFO, Parcom Capital

### Dedicated networking break

10:45 - 11:15

Networking

### In-house vs outsourcing: a balancing act

11:15 - 11:50

Main Conference Day 2 Plenary

What market factors are driving the private capital industry towards outsourcing? Considerations on what to outsource and what to keep in-house, who to outsource to and whether to keep it in one place. How to balance solutions while ensuring the quality and control of operations.

### Participants

**Roxane Combe** - Business Development Director, IQ-EQ

**In conversation with: Malcolm Goddard** - Partner and CFO/COO, Zetland Capital

**Ronald Bell** - Founding Partner and COO, Fremman Capital

### Cybersecurity spotlight

11:50 - 12:10

Main Conference Day 2 Plenary

### Participants

**Keynote: Simon Eyre** - CISO - Chief Information Security Officer, Drawbridge

### Diving into data: what's hot in AI and analytics?

12:10 - 12:45

Main Conference Day 2 Plenary

Analysing and capturing data from trends, patterns and behaviour, and transforming them into intelligence. What are the benefits of AI? How to access, monitor and report data accurately and efficiently.

### Participants

**Moderator: Frida Einarson** - Partner, Verdane

**Panellists: Andy Hampshire** - COO and CTO, Gresham House

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

**William Harris** - Chief Digital Officer, IQ-EQ

**Omar Dapul** - International Head of Solutions Engineering, Allvue Systems

### Networking lunch break

12:45 - 13:45

Networking

### Manoeuvring through the marketing minefield

13:45 - 14:20

Main Conference Day 2 Plenary

Navigating the Cross-Border Distribution Framework- what are the requirements and how can they be implemented into the fundraising process? What are the implications of changing rules on pre-marketing and reverse solicitation? How do non-EU funds go about marketing in the EU while staying compliant?

### Participants

**Moderator: Wendy Meharg** - European Counsel, H.I.G. Capital

**Panellists: Liz Judd** - General Counsel and Compliance Officer, STAR Capital

**Aaron Kienwald** - Group COO, Oakley Capital

**Jin-Hyuk Jang** - International Counsel, Debevoise & Plimpton LLP

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### Defining ESG: breaking down the rules and regulations

14:20 - 14:55

Main Conference Day 2 Plenary

With new regulatory updates coming into force over this year and the next, how can firms prepare and ensure compliance for the following:

- The Sustainable Finance Disclosure Regulation (SFDR)
- EU Taxonomy and UK Green Taxonomy
- EU Corporate Sustainability Reporting Directive (CSRD)
- EU Directive on Mandatory Human Rights, Environmental and Good Governance Due Diligence (MHRDD)

### Participants

**Moderator: Ellinor Schrewelius** - Investor Relations & Business Development, Verdane

**Panellists: Jovana Stopic** - ESG Manager, IK Investment Partners

**Yohan Hill** - Director of ESG and Responsible Investing, Adams Street Partners

**Amandeep Singh Johal** - Legal Counsel Portfolio Governance, Triton

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### Dedicated networking break

14:55 - 15:25

Networking

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### Keeping LPs happy

15:25 - 16:00

CFO/COO only

### *Closed door session, CFO/COO only*

What are the major concerns and pressures from LPs and how can these be handled? Tackling the growing volume of back-office work - how to manage increasing demands in reporting quantity, quality and frequency. What should the standard be?

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### Participants

**Discussion Leaders: Giovanni Pericolini** - Partner and CFO, Medicxi

**Raxita Kapashi** - CFO, Dawn Capital

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### Episode 2021: shared experiences and burning questions

16:00 - 16:35

CFO/COO only

### *Closed door session, CFO/COO only*

What are the key takeaways from the past 12 months and the main areas of concern for CFOs and COOs moving forward? A session aimed at tackling the tough bits.

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### Participants

**Discussion Leaders: Jonathan Hewitson** - Finance Director, Kennet Partners

**Martin Garcia** - CFO, BITKRAFT Ventures

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### Chair's closing remarks and end of SuperReturn CFO/COO 2021

16:35 - 16:40

CFO/COO only

### Participants

**CHAIR: Roxane Combe** - Business Development Director, IQ-EQ

# SCHEDULE

MAIN CONFERENCE DAY 2 - 22/09/2021

SuperReturn CFO/COO

21 - 22 September 2021  
InterContinental O2  
London

TIME	CFO/COO ONLY	MAIN CONFERENCE DAY 2 PLENARY	NETWORKING
08:00			08:30 - Registration and coffee
09:00		09:15 - Chair's opening remarks 09:20 - Valuations and volatilities 09:55 - Fundraising in 2021 and 2022: the numbers that count	
10:00		10:10 - Top-tier talent management: rewards and recognition	10:45 - Dedicated networking break
11:00		11:15 - In-house vs outsourcing: a balancing act 11:50 - Cybersecurity spotlight	
12:00		12:10 - Diving into data: what's hot in AI and analytics?	12:45 - Networking lunch break
13:00		13:45 - Manoeuvring through the marketing minefield	
14:00		14:20 - Defining ESG: breaking down the rules and regulations	14:55 - Dedicated networking break
15:00	15:25 - Keeping LPs happy		
16:00	16:00 - Episode 2021: shared experiences and burning questions 16:35 - Chair's closing remarks and end of SuperReturn CFO/COO 2021		