LP Foundation

Agenda - Day 1



08:45	Registration and Breakfast
09:00	Course Objectives and Introductions by Course Director Simone Faure, IH International Advisors Ltd - Course Director
09:10	Fund Due Diligence Dana Haimoff, JP Morgan - Manager - Track Record - Operational - Value Creation Capabilities - Succession - ESG - Emerging Managers
11:15	Break
11:30	 Planning Your Portfolio Michael Mowlem, Connection Capital Portfolio construction and pacing Measuring returns – methodologies Measuring returns – the latest approaches to benchmarking
13:00	Lunch
14:00	Portfolio Monitoring Petros Krappas, Cambridge Associates Ltd Front Office: - Advisory Boards - Annual Meetings - Update Meetings - Informal flows of information Back Office: - Quarterly and annual fund reports - Distribution and capital call notices - Being prepared with the latest information, including regarding portfolio companies - Technology solutions
15:15	Summary & Conclusions Simone Faure, Course Director
16:00	First day course close

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Agenda – Day 2



08:45	Breakfast & Recap
09:00	 Regulation, Legal Agreements and Terms David Ambler & Rober C. Mailer, Morgan, Lewis and Bockius UK LLP The regulatory framework Fund structures Fund economics Fee Structures The legal framework Terms and alignment The Limited Partnership Agreement (LPA) Other documentation
10:30	Break
10:45	ESG – LP Prospective Penelope Curwen, Cinven
12:00	Lunch
13:00	 Investing in Venture/Growth Capital Mark Coggin, British Business Bank How investing in venture funds is different What makes a good fund What makes a good LP
14:00	Introduction to Secondaries, Co-Investments & Fund Restructurings/Amendments Sandeep Mirani & Mario Guiliani, Neuberger Berman Private Equity
15:30	Break
15:45	The buyout market and current trends Simon Faure, Course Director
16:45	Summary & Close Simone Faure, Course Director
17:00	Course close