

LP Foundation



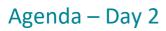
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08:45	Registration and Breakfast
09:00	Course Objectives and Introductions by Course Director Simon Faure, IH International Advisors Ltd - Course Director
09:10	Fund Due Diligence Dana Haimoff, JP Morgan Asset Management - Manager - Track Record - Operational - Value Creation Capabilities - Succession - ESG - Emerging Managers
11:15	Break
11:30	Planning Your Portfolio Scott Penwell, M&G Investments - 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 Simon Faure, Course Director
16:00	First day course close

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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 Finlay Taylor,YFM Equity Partners
12:00	Lunch
13:00	Investing in Venture/Growth Capital Misodzi Mukungurutse, 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 Simon Faure, Course Director
17:00	Course close