

# Foundation

The leading introductory course for PE and VC

Course Brochure

16 - 20 March 2026

**Five-day residential course  
in Old Windsor, Berkshire**



# Overview

UK Private Capital's flagship Foundation course delivers the vital knowledge and skills you need to excel as a private equity or venture capital fund manager in high performing deal teams. Led by some of the industry's most respected practitioners, you will develop your ability to make more informed investments and manage a portfolio, all whilst building lasting connections with peers.

## Topics covered include:

- **NEW** Being an Investor
- **NEW** Investment Committee
- The essentials of thorough due diligence
- Best practice deal structuring and investment returns
- Transaction structuring (early stage, growth capital, MBO)
- How to assess a management team
- Techniques for managing your portfolio
- Exits
- Real case studies to help you put what you've learned into practice
- Group activities to build your network

## What will you take away?

- A fundamental understanding of the deal cycle
- Insight from industry experts
- Long-lasting connections with fellow delegates within the industry
- 26 hours CPD accreditation

## Audience:

- Junior investment professionals with at least six months experience

\* **Dress code:** Smart casual attire

# Why attend?



## The leading industry-standard

Foundation provides delegates with the fundamentals of private equity, covering the lifecycle of a deal, from due diligence and investment returns, right through to managing the portfolio and exits. The course is delivered by some of the industry's most successful and experienced practitioners whose methods and expertise will help you to unlock your true potential.



## Interactive learning

Taking place renowned retreat in Old Windsor, Berkshire - De Vere Latimer Estate, the course utilises engaging face-to-face learning techniques, role-play, group discussions and case studies to put what you've learned to practice in every session.



## Forge connections

Networking is an integral part of the course, you will build longlasting connections with fellow delegates through the daily dedicated social activities including networking drinks, dinners, group activities, quizzes as well as the interactive learning sessions and contact time with course directors.

# Venue

The story of De Vere Beaumont Estate in Old Windsor is a very British one, a tale of democracy, royalty, education, and religion. At its heart, sits an 18th-century mansion, a chapel, 45 event spaces and a Georgian white house in 42 acres of parkland grounds.

The original house was built for Lord Weymouth but it was its time as a public school, from 1854 - 1967, that saw most of the estate's architectural developments.

Following a multi-million-pound refurbishment, today you'll find a wealth of these original features still intact along with a 21st-century style that ensures business, weddings and training are anything but usual.

## What else to expect?

- 4.5 days of accommodation at a renowned retreat in Old Windsor, Berkshire offering a professional and productive work environment free from distractions
- Featuring 42 acres of grounds, complete with natural ponds and specially commissioned sculptures create a relaxing space for guests to explore
- On-site gym with state-of-the-art equipment and a heated indoor swimming pool
- Social and networking activities hosted by UK Private Capital including a pub quiz and awards night
- Breakfast, lunch and dinner will be provided for the duration of the course



# Venue



# Speakers



## Course director: Jon Andrew

Jon Andrew works alongside investment teams to support operational value creation within investee companies. He shares best practice across the portfolio supporting management teams as they develop growth strategies and helps them monitor performance.

After gaining a degree in Molecular Biology & Biochemistry at Durham University, Jon qualified as a chartered accountant with PwC and held roles within the Training, Transaction Services and Consulting teams. During this time, Jon designed and rolled out PwC's inaugural Due Diligence Training Programme across Europe in 1997.

In 2005, Jon joined LDC to focus on performance improvement in its portfolio companies. Over his 15-year private equity career Jon has gained significant experience in a wide range of value creating activities and has particular expertise in driving change through complex integrations, IT implementation programmes, as well as 100-day planning initiatives.

Jon was born in Middlesbrough and because he believes the team chooses you, is a long-suffering Boro fan. He is also an ardent Yorkshire Cricket Club follower and enjoys running and tennis. When not trying to keep in shape, Jon likes to spend time with his three daughters.

## Expert speakers include:

- Elizabeth Alderson, [Livingbridge](#)
- Alistair Brew, [Business Growth Fund](#)
- Tim Clare, [Anthesis Group](#)
- Alex Leigh, [Future Planet Capital](#)
- Neil MacDougall
- Isaac Paine, [Macfarlanes LLP](#)

# Schedule

## Monday, Day 1

09:30	Course assembles and introductory session <a href="#">Jon Andrew, Course Director</a>
10:00	Industry overview <a href="#">Neil MacDougall</a> <ul style="list-style-type: none"><li>• PE/VC introduction</li></ul>
11:00	Break
11:15	Due diligence <a href="#">Jon Andrew, Course Director</a> <ul style="list-style-type: none"><li>• Growth and key drivers</li><li>• Focus your diligence</li><li>• Types of diligence</li><li>• Case study</li></ul>
13:15	Lunch
14:30	MBOs - Deal structuring and investment returns <a href="#">TBC, ECI</a> <ul style="list-style-type: none"><li>• Objectives of structuring</li><li>• Basic MBO structuring</li><li>• Risk and return</li><li>• Alternative capital</li><li>• Case study</li></ul>
15:00	Break
15:10	Deal structuring and investment returns – continued <a href="#">TBC, ECI</a>
16:45	Course closes
19:00	Burger/Pizza Night and Pub Quiz

# Schedule

## Tuesday, Day 2

09:30 Course resumes

Structuring the transaction – early stage  
[Alex Leigh, Future Planet Capital](#)

09:30

- Key considerations for early stage investing
- Enhancing upside/ protecting downside
- Funding instruments
- Case studies

11:00

Break

11:15

Structuring the transaction – early stage continued  
[Alex Leigh, Future Planet Capital](#)

13:00

Lunch

13:45

Structuring the transaction – growth capital  
[Alistair Brew, Business Growth Fund](#)

- What is growth capital?
- Working with entrepreneurs and owner managers
- Comparison with PE
- Deal pricing

15:15

Break

15:30

Structuring the transaction – growth capital continued  
[Alistair Brew, Business Growth Fund](#)

17:00

Course closes

19:00

Welcome from the UK Private Capital Chair

19:40

Dinner

# Schedule

## Wednesday, Day 3

09:30 Course resumes

09:30 Responsible investment  
Tim Clare, Anthesis Group

11:00 Break

11:15 ESG/Impact Session  
Tim Clare, Anthesis Group

12:15 Managing the portfolio (i)  
Jon Andrew, Course Director

- Sources of Shareholder value
- Structure of Portfolio management
- Allocating resources
- Portfolio reporting

13:00 Lunch

14:00 Managing the portfolio (ii)  
Jon Andrew, Course Director

14:00

- Board performance
- Non-Executive Directors
- Case study

15:30 Break

15:45 Managing the portfolio (ii) continued  
Jon Andrew, Course Director

## Wednesday, Day 3

17:00 Break

17:15 Managing the portfolio (ii) continued  
Jon Andrew, Course Director

17:45 Course ends

19:00 Dinner

# Schedule

## Thursday, Day 4

09:30 Course resumes

Legal Considerations  
[Isaac Paine, Macfarlanes LLP](#)

- 09:30
- Key issues in legal agreements
  - Typical issues that arise
  - Case Study

11:15 Break

Restructuring  
[Jon Andrew, Course Director](#)

11:30

- Catalysts for restructuring
- Understanding banks
- Security ranking and value breaks
- When cash is constrained...
- Restructuring options and common scenarios

12:30 Lunch

13:30 Restructuring continued  
[Jon Andrew, Course Director](#)

15:30 Break

15:45 Evaluating management and executive performance  
[Jon Andrew, Course Director](#)

17:30 Course closes

19:00 Dinner and Awards

# Schedule

## Friday, Day 5

09:15 Course resumes

### Exits

[Elizabeth Alderson](#), Livingbridge

- 09:30
- Why are they important?
  - Exit routes and themes
  - The current market – implications

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11:30 Course summary and Q&A  
[Jon Andrew](#), Course Director

12:00 Course ends

# Testimonials and booking

**"A fantastic course and one of the best I have attended. Across the board the content was engaging and useful, the speakers were first rate."**

Aaron Lawson-Clark, NVM PE LLP

**"Really impressed by the course director, Jon, he has some great experience; very passionate about this which very much showed."**

Dominika Kowalska, CVC

**"Good course with balance of tangible skills to transfer into my day job and expanding horizons in adjacencies, with good social calendar. Thanks a lot for all the organisation, it was perfectly organised and I had a great time while learning a lot."**

James Beart, Epiris

## Course price and booking

- **Member discounted price:** £6,000 excluding VAT
- **Non-member:** £10,000 excluding VAT

Get in touch

For further information about training,  
please contact:



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Enquire now

## Contact details

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