UK PRIVATE CAPITAL
Invested in a better future

LP Foundation

Course Agenda



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Day 1 Agenda

08:45	Registration and Breakfast
09:00	Course Objectives and Introductions by Course Director Yvonne O'Mara, Interogo Global Private Equity - Course Director
09:10	Planning Your Portfolio Ben Norris & Olivia Smith, M&G Investments • Portfolio construction and pacing • Measuring returns – methodologies • Measuring returns – the latest approaches to benchmarking
11:15	Break
11:30	Fund Due Diligence Liza Lee Marchal & Lili Jones, ICG Enterprise Trust • Manager • Track Record • Operational • Value Creation Capabilities • Succession • ESG • Emerging Managers
13:00	Lunch
14:00	Investing in Venture/Growth Capital Ariella Young, Alicorn VP • How investing in venture funds is different • What makes a good fund • What makes a good LP
15:15	Summary & Conclusions Yvonne O'Mara, Course Director

15:30	Coffee / Drinks Reception
16:30 – 17:00	End of Day 1

Day 2 Agenda

08:45	Breakfast & Recap
09:00	Regulation, Legal Agreements and Terms David Ambler, 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	Portfolio Monitoring Jamie Hayford, Pantheon 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

13:00	Lunch
14:00	ESG – LP Prospective Corinne Tomsett, Danesmead Advisory
15:00	Introduction to Secondaries, Co-Investments & Fund Restructurings/Amendments Sandeep Mirani, Neuberger
16:30	Summary & Close Yvonne O'Mara, Course Director
17:00	Course close