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NEW YORK | PRIVATE CAPITAL SUMMIT

CAPLINK GROUP

New York Private Capital Summit



October 15th, *Well& by Durst*, New York

The Annual New York Private Capital Summit is a one-day, education-focused event for private capital funds, investors, deal makers, and service providers. The purpose of the meeting is to facilitate the dissemination of actionable investment content and support the continued development of the private markets sector in the US. The conference agenda has been specifically designed to provide relevant and topical educational content for those who manage, advise, allocate to, or oversee private capital investments and operations.

The event will bring together over 300 delegates with operational, regulatory, and investment roles, as well as leading investors, to discuss institutional capital allocations into private capital investment vehicles.

The event aims to provide a macro outlook across the full spectrum of private markets investing. The content will reflect key market trends and feature influential and dynamic speakers from leading private capital funds. Topics include ESG benchmarks, value creation strategies, human capital leadership, structural and regulatory considerations of launching and forming a fund, M&A tax and compliance strategies, operational due diligence, direct lending, NAV financing, and other innovative financing tools.

We'd like to thank our event sponsors for their support of this industry-leading event. We look forward to hosting you at the conference!

Nawshad Noorkhan,
Founder, Managing Director

CapLink Group



New York Private Capital Summit- Confirmed Speakers



Keynote Speakers:

John M. Toomey, Jr. *Chief Executive Officer, HarbourVest Partners*

Confirmed Speakers:

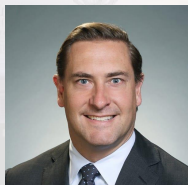
Kevin Desai, *Partner, Private Equity Sector Leader, PWC*
Amyr Hassanally, *Global Head of Private Equity Secondaries, Pantheon Ventures*
Jeffrey Keay, *Managing Director, Chair- Secondary Investment Committee, HarbourVest Partners*
Ben Perl, *Managing Director, Global Co-Head of Secondary Private Equity, Neuberger Berman*
Wilfred Small, *Senior Managing Director, Member, ASF Management Committee, Ardian*
Christophe Browne, *Partner, Secondary Investments, Lexington Partners*
Tricia Winton, *Partner and Head of ESG, Bain Capital*
Preston McKenzie, *Operating Partner, General Atlantic*
Tracey Byrne, *Operating Partner, Talent, Apollo*
Derek Mills, *Managing Director, Value Creation, Permira*
Leela Ramnath, *Managing Director, Head of ESG, Warburg Pincus*
Courtney Hagen, *Chief Talent Officer, Littlejohn & Co.*
Apoorv Saxena, *Managing Director and Head of AI, Silver Lake*
Albert Notini, *Managing Director, Lead Operating Partner, New Mountain Capital*
Dipo Ashiru, *General Counsel & Chief Compliance Officer, Veritas Capital*
Tom Newberry, *Chief Credit Officer & Chairman of Direct Lending, SoundPoint Capital*
Rony Ma, *Managing Director, Direct Lending, KKR*
Richard Ting, *General Counsel & Managing Director, Oaktree Capital*
Jamie Toothman, *Chief Operating Officer, General Counsel & Partner, Harvest Partners*
Joseph-Pierre Régent, *Chief Financial Officer, Kohlberg*
Jason Mehring, *Managing Director and President, Private Debt, Blackrock*
Mia Jung, *Head of Talent, Welsh, Carson, Anderson & Stowe*
Gaurav Aggarwal, *Managing Partner, Vivo Capital*
Clare Copeland, *Chief Tax Officer and Head of Tax Transformation, Carlyle*
Barry J. Giarraputo, *Chief Financial Officer - NB Alternatives, Neuberger Berman*

Andrew Farris, *Managing Director, Healthcare, Blackrock*
Daniel Berglund, *Partner, Head of U.S, Nordic Capital*
Thomas Mayrhofer, *Chief Financial Officer, DigitalBridge*
Daren Schnedier, *Chief Financial Officer, JLL Partners*
Katia Walsh, *AI Lead, Apollo Portfolio Performance Solutions, Apollo*
Devon Leahy, *Global Head of Sustainability, L Catterton*
Jamie Michaud, *Head of Digital and AI, Advent International*
Kim Erle, *Global Head of ESG, H.I.G Capital*
Raj Rupani, *Head of US Tax, Cinven*
Paul Zuber, *Operating Partner, North American Lead, Hg*
Nathan Cali, *Managing Partner, Noble Capital Markets Inc*
Dianna Carr-Coletta, *Partner, Direct Lending, PGIM Private Capital*
Karina Sobieski, *Managing Director, Clearlake Capital Group*
Annie Paydar, *Global Head of Human Capital, General Atlantic*
Sumana Setty, *General Counsel, Managing Director, Blue Owl Capital*
Laura Warren, *Global Head of Tax and Structuring, Hamilton Lane*
Ryan Beauchamp, *Managing Director, Head of AI, GTCR*
Sara Verkest, *Global Head of Tax, KKR*
Mark Gormley, *Partner, Lee Equity*
Leor Landa, *Head of Investment Funds, Davis Polk*
Nancy Mehlman, *Co-Head Tax Practice, Simpson Thacher*
Matthew D. O'Meara, *Partner, Head of Global Private Credit, Mayer Brown LLP*
Betty Huber, *Partner, Global Co-Chair ESG, Latham & Watkins*
Christopher Raphaely, *Co-Chair Healthcare & Life Sciences, Cozen O' Connor*

New York Speakers



Tricia Winton
Global Head of ESG
Bain Capital



John M. Toomey, Jr.
Chief Executive Officer,
HarbourVest Partners



Jamie Toothman,
Chief Operating
Officer, General
Counsel & Partner,
Harvest Partners



Aryn Hassanally
Global Head of Private
Equity Secondaries
Pantheon Ventures



Courtney Hagen Chief
Talent Officer
Littlejohn & Co



Preston McKenzie
Operating Partner
General Atlantic



Karina Sobieski
Managing Director,
Human Capital
**Clearlake Capital
Group**



Albert Notini
Managing Director,
Lead, Operating
Partner
**New Mountain
Capital**



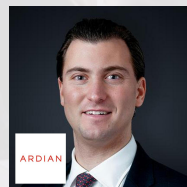
Annie Paydar
Managing Director,
Global Head of Human
Capital
General Atlantic



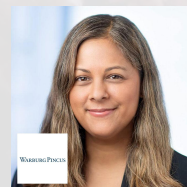
Paul Zuber
Operating Partner,
North American Lead
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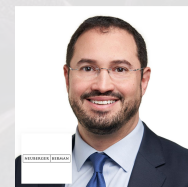
Jamie Michaud
Head of Digital
and AI
Advent International



Wilfred Small
Senior Managing
Director, Member, ASF
Management
Committee
Ardian



Leela Ramnath
Head of ESG
Warburg Pincus



Ben Perl
MD, Global Co Head of
Secondary Private
Equity
Neuberger Berman

New York Speakers



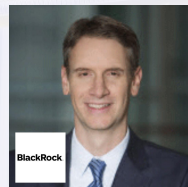
Devon Leahy
Global Head of
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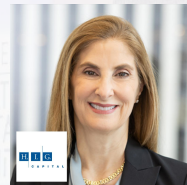
Jeffrey Keay
Managing Director,
Chair-Secondary
Investment
Committee
HarbourVest



Tracey Byrne,
Operating Partner,
Apollo



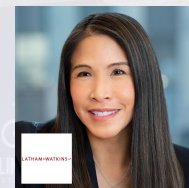
Jason Mehring,
*Managing Director
and President, Private
Debt,* **BlackRock**



Kim Leinwand Erle
Managing Director &
Global Head of ESG
H.I.G



Richard Ting,
*General Counsel &
Managing Director,*
Oaktree Capital



Betty Huber,
Partner, Global
Co-Chair ESG,
Latham & Watkins



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Sumana Setty,
*General Counsel,
Managing Director,*
Blue Owl Capital



Rony Ma,
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KKR

New York Speakers



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General Counsel & Chief
Compliance Officer,
Veritas Capital



Mia Jung,
Talent Partner,
**Welsh, Carson, Anderson
& Stowe**



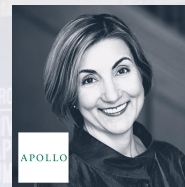
Mark Gormley,
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Lee Equity



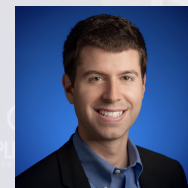
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Christophe Browne,
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Investments,
Lexington Partners



Katia Walsh
AI Lead, Apollo Portfolio
Performance Solutions
Apollo



Ryan Beauchamp,
Managing Director,
Head of AI, **GTCR**



Chandini Jain,
Co-founder and CEO,
Aquan,



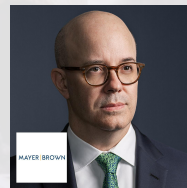
Dr. Guarav Aggarwal
Managing Partner,
Vivo Capital



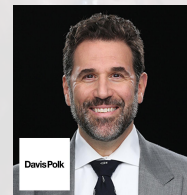
Jeffrey Klein,
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Cozen O' Connor



Matthew D. O'Meara,
Partner, Head of Global
Private Credit,
Mayer Brown LLP



Leor Landa
Head of Investment
Funds
Davis Polk



Nathan Cali
Managing Partner
**Noble Capital
Markets**

New York Private Capital Summit

PRELIMINARY AGENDA



7.30AM- 8.15AM Registration

8.15AM- 8.40AM Breakfast Workshop - Private Wealth Investing

The workshop will provide a focused discussion around the growing role of private wealth investment across private markets. As allocations from high-net-worth individuals, family offices and wealth managers continue to grow, this session offers a unique opportunity to explore the trends shaping this investment stream. The discussion will cover major trends. Attendees will network over a curated breakfast while gaining early insights into private capital strategies and the future of wealth management.

8.40AM -9.00AM Keynote Interview:

An industry leader sits down with Bloomberg to discuss their current outlook and investment theses on global financial markets. What regions and sectors will provide the best opportunities for growth and where should investors look to next?

9.00AM- 9.30AM Panel Discussion: Investing in US Private Equity

The panellists will explore how investors in US private equity can navigate uncertainties including inflation and rising interest rates, while capitalising on the substantial amount of dry powder available. Discussion will focus on sectors that have the potential to deliver higher levels of return and how geopolitical risks and digital transformation impact on these investment decisions.

Moderator: **Andy Thompson**, *Founder and CEO, Notch Partners*

Panelists:

Young Lee, *Partner and Co-President, Audax Private Equity*
Daniel Berglund, *Partner, Head of U.S., Nordic Capital*

9:30AM- 10.00AM Panel Discussion: Navigating Fund Operations & Formation-Regulatory and Structural Considerations

Industry experts will address key structural considerations and legal complexities of forming, launching and operating a private markets fund. Focusing on evolving regulatory developments from the Securities and Exchange Commission (SEC), that are impacting fund managers and investors. The panel will discuss best practice and strategies for firms to help adapt to these changes.

Moderator:

Panelists:

Dipo Ashiru, *General Counsel & Chief Compliance Officer, Veritas Capital*
Richard Ting, *General Counsel & Managing Director, Oaktree Capital*
Sumana Setty, *General Counsel, Managing Director, Blue Owl Capital*
Jamie Toothman, *Chief Operating Officer, General Counsel & Partner, Harvest Partners*

New York Private Capital Summit



PRELIMINARY AGENDA

10.00- 10.30AM Networking Break

10.30AM- 11.00AM Panel Discussion: How are private capital firms leveraging generative AI?

Generative AI is asserting itself as a game-changing technology across the global economy. Within the portfolio, AI can rapidly provide insights into potential impacts and opportunities across various companies and industries. Will these technologies disrupt a portfolio company's value chain or economic model? At the firm level, generative AI offers numerous ways to streamline or automate back-office functions. Can these tools leverage a firm's scale by making institutional knowledge instantly available to everyone who needs it? Additionally, how are private capital firms using AI during due diligence to assess threats and opportunities in every diligence process the firm undertakes?

Moderator: **Jeffrey Klein**, *Managing Director, Alvarez & Marsal*

Panelists:

Katia Walsh, *AI Lead, Apollo Portfolio Performance Solutions, Apollo*
Jamie Michaud, *Head of Digital and AI, Advent International*
Apoorv Saxena, *Managing Director and Head of AI, Silver Lake*
Ryan Beauchamp, *Managing Director, Head of AI, GTCR*
Chandini Jain, *Founder, Chief Executive Officer, Auquan*

11.00AM-11.30AM Panel Discussion: Secondaries: What Does the Future Hold?

The secondaries market is maintaining strong growth, with 2024 seeing record transaction volumes, surpassing previous highs. Institutional investors remain active, driven by a need for liquidity and portfolio rebalancing. The panel will discuss how increased market sophistication and a robust deal flow are pushing the sector forward, with private equity firms and secondary buyers focusing on more complex, niche deals. Rising interest rates, however, have introduced new challenges and pricing dynamics.

Moderator: **Leor Landa**, *Head of Investment Funds, Davis Polk*

Panelists:

Amyn Hassanally, *Global Head of Private Equity Secondaries, Pantheon Ventures*
Jeffrey Keay, *Managing Director, Chair- Secondary Investment Committee, HarbourVest Partners*
Ben Perl, *MD, Global Co-Head of Secondary Private Equity, Neuberger Berman*
Wilfred Small, *Senior Managing Director, Member, ASF Management Committee, Ardian*
Christophe Browne, *Partner, Secondary Investments, Lexington Partners*

New York Private Capital Summit



PRELIMINARY AGENDA

11.30AM-12.00PM Panel Discussion: Sustainability & ESG

ESG leaders will discuss how firms are integrating ESG into investment strategies to drive long-term value, manage risks, and meet stakeholder expectations. The conversation will also cover regulatory pressures, best practices for measuring impact, and how ESG-focused investments are reshaping the future of private equity in a rapidly evolving market.

Moderator: **Betty Huber**, *Partner, Global Co-Chair ESG, Latham & Watkins*

Panelists:

Tricia Winton, *Partner and Head of ESG, Bain Capital*

Leela Ramnath, *Head of ESG, Warburg Pincus*

Kim Erle, *Global Head of ESG, H.I.G Capital*

Devon Leahy, *Global Head of Sustainability, L Catterton*

12.00PM-12.30PM Panel Discussion: The Evolving CFO- Leading Through Operational Complexity

As U.S. private equity firms grow, CFOs face mounting challenges—from evolving regulations and increasing LP demands to modernizing legacy systems. Operations teams are grappling with complex fund structures, data silos, and resource constraints. This panel explores key operational pressures, priorities around automation, co-investment oversight, and the future of finance leadership in a rapidly shifting private equity environment

Moderator: **William Andreoni**, *Partner, National Asset Management Consulting Leader, Fund Services Co-Lead, RSM US LLP*

Panelists:

Thomas Mayrhofer, *Chief Financial Officer, DigitalBridge*

Daren Schnedier, *Chief Financial Officer, JLL Partners*

Joseph-Pierre Régent, *Chief Financial Officer, Kohlberg*

Barry J. Giarraputo, *Chief Financial Officer - NB Alternatives, Neuberger Berman*

New York Private Capital Summit



PRELIMINARY AGENDA

12.30PM-13.00PM Roundtables (30 MINUTES)

Roundtables will be held in a separate room. Each roundtable will be assigned a table number, and topics will be displayed on the main stage, on screens around the venue, and in the official event app. To ensure participation, please pre-book your roundtable in advance.

Table 1: Tech Investing Opportunities

Hosted By:

Table 2: Table 2: Co-Investments- How to get the deal done

Hosted By:

Table 3: A Spotlight on ESG & Impact Investing

Hosted By:

Table 4: Continuation Vehicles, Secondaries ,GP Liquidity Solutions

Hosted By:

Table 5: Due Diligence & Downside Risk Mitigation

Hosted By:

Table 6: NAV Financing

Hosted By:

Table 7: Generative Ai

Hosted By:

Table 8: Examining the US Private Equity Landscape

Hosted By:

Table 9: US Healthcare Investing

Hosted By:

Table 10: ODD for Emerging Managers

Hosted By:

13.00PM-14.00PM Networking Lunch Break

New York Private Capital Summit



PRELIMINARY AGENDA

14.00-14.20 Keynote Interview: John M. Toomey, Jr. *Chief Executive Officer, HarbourVest Partners*

John Toomey, Chief Executive Officer, HarbourVest Partners sits down to discuss HarbourVest's current outlook and investment theses on global private market investing. What regions and sectors will provide the best opportunities for growth and where should investors look to next?

14.20-14.50 Panel Discussion: Human Capital- How Talent Can Drive Value, Foster a Culture of Growth and Improve Diversity In A Transformational Market.

Successful investments rely heavily on skilled professionals who can identify opportunities, perform due diligence, and execute strategic growth plans. Attracting and retaining talented management teams within portfolio companies is essential for maximizing returns and achieving long-term success, making human capital one of private equity's most valuable assets. The panel will discuss real life case studies for identifying, onboarding and retaining talented individuals, who have directly impacted a positive return on investment for their portfolio companies.

Moderator: **Chris Gagnon**, *Managing Director, CEO Works*

Panelists:

Courtney Hagen, *Chief Talent Officer, Littlejohn & Co*
Tracey Byrne, *Operating Partner, Talent, Apollo*
Karina Sobieski, *Managing Director, Human Capital, Clearlake Capital Group*
Annie Paydar, *Global Head of Human Capital, General Atlantic*
Mia Jung, *Head of Talent, Welsh, Carson, Anderson & Stowe*

14.50-15.20 Panel Discussion: Private Equity- Navigating Tax Considerations

Discussion will focus on key tax considerations for private equity firms, focusing on the impact of state taxes, interest deductibility on leveraged buyouts, and strategies to optimize capital gains treatment. Panelists will address international tax compliance and tax planning for exits, offering insights on how to maximize returns and minimize liabilities in a changing tax environment.

Moderator: **Nancy Mehlman**, *Co-Head Tax Practice, Simpson Thacher*

Panelists:

Sara Verkest, *Global Head of Tax, KKR*
Raj Rupani, *Head of US Tax, Cinven*
Laura Warren, *Global Head of Tax and Structuring, Hamilton Lane*
Clare Copeland, *Chief Tax Officer and Head of Tax Transformation, Carlyle*

New York Private Capital Summit



PRELIMINARY AGENDA

15.20- 15.50PM Networking Break

15.50-16.20 Operating Partner Panel Discussion: Value Creation & Portfolio Management

The panel will focus on how firms drive growth through operational improvements, talent optimization, and strategic acquisitions. The conversation will cover hands-on management techniques to enhance performance, mitigate risks, and unlock long-term value. Panelists will also share insights on preparing portfolio companies for successful exits, ensuring maximum returns, and navigating challenges in today's changing market environment.

Moderator: **Kevin Desai**, *Partner, Private Equity Sector Leader, PWC*

Panelists:

Derek Mills, *Managing Director, Value Creation, Permira*
Preston McKenzie, *Operating Partner, General Atlantic*
Paul Zuber, *Operating Partner, North American Lead, Hg*
Albert Notini, *Managing Director, Lead Operating Partner, New Mountain Capital*
Carrie Osman, *Founder, Chief Executive Officer, Cruxy*

16.20-16.50 Panel Discussion: Healthcare Investing

The healthcare sector is thriving, driven by an aging population, increased demand for healthcare services, and innovations in medical technology – making it a solid choice for private equity investment. The panel will discuss opportunities for investors in sectors like telemedicine, healthcare IT, and aging services. Identifying the impact changing regulations and reimbursement uncertainties will have on the sector. Experts will focus on how private equity firms can capitalize on healthcare's growth potential, focusing on value-based care models, cost efficiency, and expanding access to quality healthcare services across the nation.

Moderator: **Christopher Raphaely**, *Partner, Co-Chair HLS, Cozen O' Connor*

Panelists:

Nathan Cali, *Managing Partner, Noble Capital Markets Inc*
Mark Gormley, *Managing Partner, Lee Equity*
Gaurav Aggarwal, *Managing Partner, Vivo Capital*
Andrew Farris, *Managing Director, Healthcare, Blackrock*

New York Private Capital Summit



16.50- 17.20AM Keynote Panel Discussion: Private Credit and Direct Lending

Speakers will address the growing role of non-bank lenders in financing leveraged buyouts, growth capital, and refinancing. The conversation will cover market trends, risk management strategies, and how private credit is offering attractive opportunities amidst bank lending constraints.

Moderator: **Matthew D. O'Meara**, *Partner, Head of Global Private Credit, Mayer Brown LLP*

Panelists:

Tom Newberry, *Chief Credit Officer & Chairman of Direct Lending, SoundPoint Capital*

Jason Mehring, *Managing Director and President, Blackrock Direct Lending/ Private Debt*

Dianna Carr-Coletta, *Partner, Direct Lending, PGIM Private Capital*

Rony Ma, *Managing Director, Direct Lending, KKR*

17.50 -18.00 Closing Remarks, TBC, *Business Reporter, Bloomberg*

18.00-19.30 Networking Cocktail, 2nd Floor,  Nasdaq



17.20- 17.50 Closing Keynote Discussion- (Nasdaq MarketSite, 2nd Floor)

Global Economic Outlook For Private Market Investing:  Nasdaq

Join investment, strategy and research leaders covering the global economic outlook from leading private market firms as they explore the macroeconomic forces driving global markets, investment strategies, and risk management. Discover how private funds are actively future-proofing their portfolios—navigating inflation, interest rates, and geopolitical shifts to secure long-term value and resilience.

Moderator: Chief Economist, Private Markets, EY, (TBC)

Panelists:

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Our large, international team of private equity and funds specialists are on hand to provide you with advice at every stage of the private equity deal lifecycle. We have extensive experience of working with private equity investors, funds and portfolio-backed businesses, so we are well-versed in the fast-paced demands of the industry. Our specialists support your needs across due diligence, mergers & acquisitions, IPOs, tax services, fund structuring, and more. Our deals experience by industry and deep sector knowledge is also harnessed to add value to the private equity deal process.



Increasingly, environmental, social, and governance (ESG) issues are becoming core business priorities for companies, their boards, and their investors. The Latham ESG team combines cross-sector legal and commercial acumen to help clients drive value through their ESG strategies, while carefully addressing and mitigating risk. Our cross-disciplinary approach draws on Latham's experienced team of regulatory, transactional, and litigation practitioners to provide a comprehensive offering that helps clients align with the many facets of ESG, including responsible investment, sustainability, and corporate integrity issues.



Davis Polk & Wardwell LLP (including its associated entities) is an elite global law firm with world-class practices across the board. Clients know they can rely on us for their most challenging legal and business matters. From offices in the world's key financial centers and political capitals, our more than 1,000 lawyers collaborate seamlessly to deliver exceptional service, sophisticated advice and creative, practical solutions. Investment management clients rely on us for creative, custom solutions that help them achieve their business goals. We work with all types of private and registered funds, including private equity funds, hedge funds, secondary funds, credit funds, BDCs, closed-end funds, ETFs, growth capital funds, funds of funds and high net worth conduits – ranging from industry leaders to first-time funds.



Simpson Thacher is one of the world's most respected law firms. But for us, this has never simply been a matter of size or rankings. It's the direct result of our commitment to one founding principle. Multinationals, banks, investment funds and other sophisticated businesses turn to Simpson Thacher's Tax Practice for advice on their largest and most complex transactions. Our U.S. and U.K. tax lawyers work closely with our corporate and real estate colleagues to offer clients the full spectrum of deal and fund capabilities.

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MAYER | BROWN

As private capital vehicles gain momentum from more traditional sources, Mayer Brown is poised to deliver top-level legal advice on this emerging source of capital. We offer private credit funds a “one-stop shop” of legal advice on several aspects of their business, including front-end agency and lender considerations, workouts, structuring, back leverage and regulatory considerations—all delivered with exceptional service.



Consistently ranked amongst the top U.S. law firms, Cozen O'Connor is a full-service corporate law firm with 850 attorneys in 32 offices. Cozen's Health Care & Life Sciences Practice is composed of attorneys with decades of experience focused solely in this industry resulting in the highest quality legal work. We have deep regulatory, reimbursement, pre-transaction due diligence and post-transaction compliance experience and because we've been on every side of a deal, we know how to mitigate risk and get deals done efficiently and effectively, delivering significant value to our clients.



ALVAREZ & MARSAL

Founded in 1983, Alvarez & Marsal is a leading global professional services firm. Renowned for its leadership, action and results, Alvarez & Marsal provides advisory, business performance improvement and turnaround management services, delivering practical solutions to address clients' unique challenges. With a worldwide network of experienced operators, world-class consultants, former regulators and industry authorities, Alvarez & Marsal helps corporates, boards, private equity firms, law firms and government agencies drive transformation, mitigate risk and unlock value at every stage of growth.



CAC Specialty is a leading specialty insurance broker and advisor that provides expertise and placement capabilities across the spectrum of insurance and capital markets. CAC delivers customized solutions for a wide range of risks, serving both large corporations and small to-medium enterprises. As an employee-controlled company, we house top industry talent dedicated to meeting our clients' comprehensive risk management needs.

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Notch Partners is the preeminent provider of CEO-level talent to private equity firms seeking competitive advantage through proprietary deal flow, investment insight, and superior management teams. Unparalleled Breadth and Depth of C-Suite Talent. Notch provides access to a curated network of CEO-caliber talent that would take even marquee firms decades to build and a sizeable staff to maintain. Private Equity Dedication and Sophistication. Notch's exclusive focus on private equity gives us unique insight into the operating needs of PE-backed companies and how to leverage talent from deal origination to competitive auctions.



More than just fund administrators, we leverage leading technologies and an innovative approach to deliver world-class administration, advisory and tax services specifically for private equity and real estate funds. Whether yours is an emerging or a well-established fund, we will work with you to design a custom-fit, scalable and holistic solution to help you stay compliant, manage risks and meet obligations efficiently and economically. RSM Fund Services+ combines deep industry experience, an advanced integrated technology platform and a client-centric service model to increase efficiencies and reduce operational challenges. Discover the RSM difference, and experience the power of being understood.



Large enterprises, privately owned companies, governmental entities, and high-net-worth individuals face near- and far-term operational issues. They turn to EisnerAmper for comprehensive audit, accounting and tax, advisory, and outsourcing services. Our clients represent enterprises of every form, ranging from sophisticated financial institutions to startups, global public firms to middle-market companies, governmental entities as well as high-net-worth individuals, family offices, nonprofit organizations and entrepreneurial ventures across a variety of industries. We are also engaged by the attorneys, financial professionals, bankers, investors, and key stakeholders who serve these clients.



Gain.pro is on a mission to provide global private market visibility. Our industry-leading platform combines advanced AI tech with local-for-local research. It delivers the highest quality information on the companies that matter to you most. We serve 100% of MBB/Big-4 advisories, clients representing >\$1 trillion of private equity capital and more than 70% of the top-20 global M&A houses.

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AUQUAN

Our cutting-edge tools and methodologies are designed to pivot human capital interventions from process excellence to value creation. We supercharge the execution of strategy by precisely connecting it to talent selection, talent allocation, and talent mobilization. We are evidence-based, risk-seeking, and obsessed with defining “the fewest possible things” that will bend your value curve. We are the Talent to Value Company.

Auquan liberates finance industry professionals from time-consuming manual tasks so they can focus on higher value work and make faster, more informed strategic decisions. In finance, extraordinary people spend countless hours on routine tasks — not high value, impactful work. Auquan is changing that. We're using AI agents to automate the time-consuming manual aspects of deep knowledge work and usher in a new era in financial services. 25% of the top 20 global financial firms use Auquan to empower their people to tackle mission-critical challenges and make faster, more informed decisions.

CRUXY

Cruxy is a growth intelligence firm trusted by some of the world's leading private equity funds, including Advent International, Hg Capital, Montagu, and Permira. Renowned for its forensic approach to product, packaging, and pricing strategy in B2B tech, Cruxy goes far beyond surface-level analysis. The team is known for identifying hidden risks and untapped value pre- and post-deal. At the core of its methodology is the Cortex - Cruxy's proprietary intelligence engine that fuses over 2 billion data points with deep sector expertise. This enables Cruxy to rapidly triangulate the reality behind commercial models and extract actionable insight for its clients. What sets Cruxy apart is its obsession with impact: translating data into real, measurable outcomes that drive growth and value for invest

ZZ
ZEDRA

As a global independent fund administrator, we offer best in class combinations of people, process and technology working efficiently throughout the fund design process, implementation and governance. At the heart of our service ethos is the belief that clients are looking for something more than a simple administration service. Operating from key geographies including the Cayman Islands, Luxembourg, Jersey, Guernsey, the US and Singapore we have the local knowledge you need across the world

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