

**NYC26**

---

# Private Equity Value Creation **Forum**

September 29th, 2026 - HOTEL ST. REGIS · NYC



Actum Group's Private Equity Value Creation Forum is an exclusive, invitation-only gathering of 100 selected senior value creation professionals, designed to foster peer-to-peer connections among the industry's leading decision-makers.

Featuring a distinguished line-up of private equity value creation leaders and operating partners, the one-day program explores the operational, commercial, digital, and leadership levers shaping portfolio performance, enterprise value, and superior returns.

# MORNING SESSIONS

- **08:00 – 09:00 Breakfast Briefing**
- **08:30 – 09:15 Registration & Networking**
- **09:15 – 09:20 Actum Welcome**  
**Raouf Fria**, Co-Founder & Chief Product Officer, **Actum Group**
- **09:20 – 09:30 Chair Opening Remarks**
- **09:30 – 10:15 Panel — Investment and Value Creation in the Age of Geoeconomics**
  - **Embedding geopolitical resilience into the value creation playbook**
  - **Rewriting the deal underwriting and portfolio monitoring framework**
  - **Capturing industrial policy capital as a value creation accelerator**

**Richard Elder**, Partner & Head of Global Portfolio Solutions, **Carlyle**  
**Caitlin Gubbels**, Senior Managing Director & Global Head of Private Equity, **CPP Investments**  
**Rodney Zimmel**, Global Head of Operating Team, **Blackstone**  
**Anne Arlinghaus**, Partner & Co-Head of Capstone, Americas, **KKR**  
**Anton Orlich**, Managing Investment Director, **CalPERS**
- **10:15 – 10:45 NETWORKING BREAK**



**10:45 – 11:30**

## **SUPPLY CHAIN STREAM**

**Creating Value Through Procurement Excellence**

- **Procurement as EBITDA engine**
- **The 90-day procurement sprint**
- **Portfolio buying power as competitive advantage**

**Kevin Barnes**, MD, Portfolio Chief Procurement Officer, **BC Partners**

**Seth Brody**, Partner, Global Head of Operational Excellence, **Apax**

**Amanda Good**, Partner & Head of Value Creation, **Searchlight Capital**

**Greg Pappas**, MD, Portfolio Support, **Berkshire Partners**

**Timothy Menzie**, Operating Partner, **Ardian**



## **REVENUE GROWTH STREAM**

**Value-Based Pricing in Fragmented Markets**

- **Improving pricing power and margins**
- **Using customer value perception to drive margin expansion**
- **Practical pricing strategies for scalable portfolio growth**

**David Buckey**, MD, Head of Growth Acceleration, **General Atlantic**

**Ingrid Hammond**, Operating Partner, Portfolio Group, **Bain Capital**

**Russ Trpkovski**, Operating Partner, **CVC**

**Hilary Headlee**, Operating Partner, **Insight Partners**

**Jeanne Chen**, Managing Director, **Cinven**

**Eric Brotman**, Senior MD & Head of Partner Engagement, **Blue Owl**

**11:30 – 12:15**

## **SUPPLY CHAIN STREAM**

**Buy, Build, Integrate: Turning Supply Chain Complexity into Portfolio Value**

- **Buy-and-build strategies across fragmented industrial markets**
- **Portfolio-wide vs decentralised sourcing models**
- **Cross-portfolio benchmarking to identify best practices**

**Kevin L. Masse**, MD & Chief Portfolio Officer, **TA Associates**

**Nadeem Syed**, Senior MD & Head of Value Creation, **Vista**

**Matt Eisen**, Partner, **Hellman & Friedman**

**Terrence Hahn**, Operating Partner, **Cerberus Capital Management**

**Colin Smith**, MD & Head of Portfolio Transformation Team, **Oaktree**

## **REVENUE GROWTH STREAM**

**Revenue Growth vs Margin Expansion: Managing the Trade-Off**

- **Balancing short-term EBITDA delivery with long-term commercial investment**
- **Identifying profitable, scalable revenue opportunities**
- **Aligning investors and management on growth vs margin trade-offs**

**Neil Kalvelage**, Senior MD, Head of Portfolio Operations, **Centerbridge**

**Laura Desmond**, Operating Partner, **Providence**

**Vivek Jain**, Managing Director, **H.I.G Capital**

**Christy Carlson**, Operating Partner, **Goldman Sachs Asset Management**

**Derek Mills**, MD Value Creation, **Permira**

**12:15 – 13:30 NETWORKING LUNCH & PRIVATE LUNCH**



**13:30 – 14:15**

## **TECH & GEN AI STREAM**

### **No Data, No AI, No Value: Building the Foundations for Real Impact**

- **From hype to operational impact: where AI is already creating measurable value**
- **Data as the new competitive moat**
- **Preparing portfolio companies for AI adoption through data governance**

**Raj Kushwaha**, MD, Value Creation Head & Chief Digital Officer, **Warburg Pincus**

**Fabio Ficano**, MD, AI and Innovation Group, **Ares Management**

**Alexandra Lutz**, Managing Director, Value Creation, **EQT**

**Stuart Sim**, MD, Head of AI, **Silver Lake Partners**

**Lloyd Hilton**, Head of Hg Catalyst, **Hg**



## **OFFICE OF THE CFO STREAM**

### **The New CFO Playbook for Growth and Value**

- **The evolving CFO: from financial steward to value creation driver**
- **CFOs as translators between operations, technology, and investors**
- **The war for finance talent in PE-backed businesses**

**Brian Chu**, Partner and Head of Performance, **Apollo**

**Anne Huemme**, Portfolio CFO, Head of Portfolio Finance, **Hg**

**Subhi Sherwell**, MD Operations, **TPG**

**Lakshman Charanjiva**, Partner, Head of Portfolio Operations, **BC Partners**

**Michael DeVeau**, Chief Financial Officer, **IFF / CVC PortCo**



**14:15 – 15:00**

## **TECH & GEN AI STREAM**

### **Cloud as a Core Value Driver**

- **Assessing cloud maturity and tech infrastructure during due diligence**
- **Leveraging cloud and AI to accelerate growth and portfolio performance**

**Thomas Charles David Jr**, Technology Operating Partner, **Thoma Bravo**  
**Kelly Breitenbecher**, Chief Portfolio Technology Officer, **Leonard Green & Partners**

**Tyler Modell**, Head of Technology and Security, **Searchlight Capital**

**Jessica Ross**, Operating Partner, Digital Strategy, **Apax**

**Chris Satchell**, Head of Portfolio Technology, **CD&R**



## **OFFICE OF THE CFO STREAM**

### **Driving Measurable Impact Through Digital Change**

- **How CFOs in portfolio companies are accelerating digital change**
- **Automating processes and improving operational efficiency across portfolios**

**Todd Novak**, MD and Head of Portfolio Finance, **MDP**

**Philippe El Khazen**, Operating Partner, **Valor Equity Partners**

**Rebeca Sanchez Sarmiento**, Finance Operating Partner, **Sixth Street**

**Jay Epstein**, MD & CFO Advisor, **Warburg Pincus**

**Bill Koefoed**, Chief Financial Officer, **OneStream / HG PortCo**

# AFTERNOON SESSIONS

- **15:00 – 15:30 NETWORKING BREAK**
- **15:30 – 16:15 Developing Leaders to Unlock Portfolio Performance**
  - **The talent gap: professionalization versus entrepreneurial culture**
  - **Upskilling existing teams versus replacing leadership in portfolio companies**
  - **Gen Z expectations: culture, purpose, and flexibility impact on productivity**

**John Kelleher**, Managing Partner & Global Head of Operating Team, **CVC**  
**Tracey Byrne**, Operating Partner, **Apollo**  
**Mark Gillett**, MD & Head of Value Creation, **Silver Lake**  
**Lauren Heller**, Managing Director, **TPG**  
**Marco Mendes**, MD & Head of Portfolio Support Group, **Advent International**
- **16:15 – 16:45 Fireside Chat — Leadership Resilience and the Power of Teams**

**Tony La Russa**, Former Manager Chicago White Sox & Three-Time World Series Champion
- **16:45 – 17:00 Closing Remarks**
- **17:00 – 19:00 DRINKS RECEPTION**

# GET IN TOUCH.

RAOUF FRIA

[rf@actumgroup.com](mailto:rf@actumgroup.com)

+44 (0) 203 307 5641

+44 (0) 7985 546356

[actumgroup.com](http://actumgroup.com)