

# 1-Day Private Equity Bootcamp

For Investors and Finance Professionals

## Executive Summary

This one-of-a-kind Private Equity Bootcamp focuses on the knowledge and skills needed to:



Invest in private equity



Advise clients on how to invest in private equity

## Learning Objectives



### Private Equity Overview

- Explain why and how investors add alternative investments and private equity to their portfolio
- Define various alternative investments and identify risks associated with them
- Understand and distinguish among the various categories of private equity, such as venture capital, growth capital and buyouts
- Understand how to distinguish among the various categories of private equity, including fund investing, direct investing, co-investing and secondary investing



### Deal Sourcing and Due Diligence

- Develop a plan to generate proprietary deal flow for yourself or for a client
- Create a checklist on what investors need to look for when searching for a direct private equity investment
- Define and differentiate between commercial, financial, managerial and legal due diligence – and dive deep into each type
- Build a comprehensive due diligence process, including the development of thought-provoking questions to ask management during the due diligence process



### Value Creation and Exit Strategies

- Define and differentiate between operational improvement, multiple expansion and deal structuring
- Dive deep into value creation strategies by specifically focusing on operational improvements
- Understand the secrets to being a successful private equity board member – focusing on strategy and execution in the portfolio company
- Evaluate the pros and cons of different exit strategies in a direct private equity investment including exit to a strategic buyer, a financial buyer and the public markets



## Learning Environment

We seek to empower with knowledge to create lasting value for all parties through our unique teaching style that includes:

- Interactive and personalized learning to ensure deep levels of understanding
- Active learning provided through:
  - Thought-Provoking Polls
  - Stimulating Discussions
  - Analyzing Real World Problems
  - ....and more
- Continuous communication and support

## About the Instructor

Steve Balaban, CFA:

- Chief Investment Officer in private equity for 13+ years
- Award-Winning Lecturer in private equity at the University of Waterloo
- Private Equity Subject Matter Expert for the CFA Institute as a Contributing Author for the CFA Level I and Level III Curriculum