

Private Equity Due Diligence Bootcamp Day 2

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



Building on the Private Equity Overview Bootcamp, this Private Equity Due Diligence Bootcamp takes a deeper dive into direct and fund due diligence

Review from Day 1 of:



Private Equity Overview



Deal Sourcing and Due Diligence



Value Creation and Exit Strategies

Deeper Dive in Day 2 into:



Private Equity Fund Due Diligence

- Create a comprehensive due diligence checklist for investing in private equity funds
- Understand the seven most important things to look at when investing in private equity funds
- Improve your ability to formulate and ask specific questions throughout the fund due diligence process



Private Equity Direct Due Diligence

- Develop deep understanding of commercial, financial, management, and legal due diligence
- Identify important metrics on financial statements when conducting financial due diligence
- Learn how to apply value creation strategies to real-world private equity situations



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 15+ 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