



Fund structuring: regulatory considerations

20 November 2025, London

PATRIZIA
24 Endell St
London WC2H 9HQ
UK

academy@inrev.org
+31 (0)20 235 86 02
www.inrev.org

08:30 **Registration and welcome coffee**

09:00 **Course introduction**

- Course objectives
- Explanation case study
- Terminology
- What is a fund?

Darren Stolzenberg, Partner, CMS (Course leader)

09:45 **Introduction to the regulatory landscape for fund structuring**

- Impact of AIFMD
- MiFID and structures outside AIFMD

Jeff Rupp, Director of Public Affairs, INREV

10:30 **Coffee break**

11:00 **SFDR and SDR**

- Articles under SFDR
- Labels under SDR
- Considerations relevant to the fund's structure

Anisha Galli, Investment Funds Lawyer, Linklaters



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11:45

Key legal framework and related issues

- Managing and marketing your fund
- The document suite
- Ancillary documents
- Key issues

Jan Gruter, Investment Funds Partner, Addleshaw Goddard

12:30

Lunch

13:45

Fund terms

- Common fund terms
- Examples

Niall Dickson, Partner, Goodwin

14:30

Introduction to tax considerations for fund structuring

- Investor considerations
- Fund level considerations
- ATAD
- ESG and tax structuring implications

Patricia Gudiño Jonas, Partner, EY

15:15

Lunch



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Case study negotiation

16:45

Course wrap-up by course leader

17:00

End



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