Effective due diligence course

23 May 2024, London

08:30 Registration and welcome coffee

09:00 Course introduction
• Welcome and course objectives
• Programme
• Introduction course participants
• Introduction to case study

Alex Tilson, Managing Director, International Business Development, Primonial REIM (course leader)

09:30 The due diligence process from the investor’s perspective
• How to organise an effective process
• Investment philosophy
• Selection criteria and alignment of interest
• Analysing track records
• Challenges and future trends

Alistair Dryer, Head of Europe, La Salle Global Solutions

10:30 Coffee break

11:00 The due diligence process from the manager’s perspective
• Preparation for due diligence: examples of INREV DDQ’s
• Managing and mapping the process
• Examples of challenges and transparency

Ilkka Tomperi, Partner and COO, CapMan
**Investor vs. manager view on effective due diligence**
Panel discussion moderated by Alex Tilson, Managing Director, International Business Development, Primonial REIM

- Common challenges
- Tips and tricks
- Examples

*Panelists to be confirmed*

**How to incorporate environmental and social factors**

- ESG due diligence: process
- Key factors to review: checklist
- Examples of current challenges and trends

Olivia Muir, Head of Sustainability, Real Estate & Private Markets, UBS Asset Management

**The role of risk management and operational due diligence**

- The role of risk management in the due diligence process
- Key risks and how to identify them
- How to assess a manager’s capability to manage and mitigate risks
- How to organise an operational due diligence

Goffe Jensma, Principal, Investment Risk Management, Operational Due Diligence, PGGM

**Coffee break**
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15:00

Legal due diligence
- Overview of the process, roles and responsibilities
- Key issues including distributions, governance and exits
- Latest developments and trends

Clare Baker, Partner, Linklaters

15:45

Case study discussion

Alex Tilson

17:15

Course wrap-up

Alex Tilson

17:30

End