



Effective due diligence course

23 May 2024, London

Hines
Grainhouse 6 Dryden St
WC2E 9NH
London, UK

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+31 (0)20 235 86 02
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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



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11:45

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

12:15

Lunch

13:15

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

14:00

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

14:45

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