



BUSINESS LEADERS PROGRAMME: CFO FORUM 2023

Connecting CFOs from across the private equity investment lifecycle

Gaining insights on technical matters

The Business Leaders Programme CFO Forum 2023 drew on the experience of RSM leaders, subject-matter experts, and CFOs about how to make the most of the opportunities presented and challenges faced across the private equity investment lifecycle.

We covered the following topics:

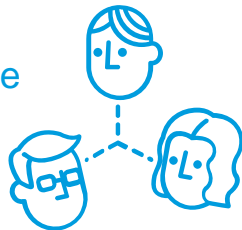
- the current state of the private equity market;
- optimising the tax strategy in a PE-backed business; and
- update on legislation around the failure to prevent the facilitation of tax evasion.

RSM's UK Economist, Tom Pugh, also gave his forecast for the year ahead and his insights on the impact that macroeconomic factors might have on UK-based businesses.

Peer-to-peer connections

The forum enabled CFOs to network with other senior professionals from private equity-backed firms, allowing them to share best practice and gain insights into their focus.

Bringing together over 45 CFOs from private equity-backed businesses in the £10m - £50m turnover range.



Debating current issues

Our breakout sessions allowed for interaction and debate around key technical topics.

Each session included case studies and practical examples, offering CFOs ownership over the discussions.

Topics included:

- delivering and reporting on your carbon footprint strategy;
- how to embed an ED&I strategy;
- safeguarding against cyber threats and risks; and
- why driving value from your data becomes more critical following a private equity investment.

It was a really useful morning, all of the sessions and presenters were excellent. It was also great to connect with other CFO peers.

– Andrew Nelson, Amethyst Radiotherapy Group BV –

It was good to meet lots of others in a similar position to me and to pick up tips and knowledge from RSM's field of experts. It was also a great location and lunch.

– John Williams, Shaw Gibbs –

Business Leaders Programme

Our Business Leaders Programme (BLP) is focused around building strategic, long-term relationships with best-in-class CFOs, CEOs, chairs and non-executive directors who have strong experience of leading and driving value within private equity-backed businesses.

We recognise that having the right talent is key to driving value creation and achieving a successful exit. Our network offers our private equity client's access to over 500 industry leaders with experience across multiple sectors and functions, partnering them with the right talent at all stages of the investment lifecycle – from origination all the way through to exit.

Our BLP is focused on four key pillars:



Building teams: we support our private equity clients to find the best executives and non-executives for their portfolio companies and facilitate introductions that will add value in the future. We do this on a no fee basis;



Supporting careers: we enable our business leaders to grow their professional network of private equity contacts via personal introductions. We also put our business leaders forward for relevant roles;



Professional network: we regularly connect our business leaders through events and training to facilitate networking and knowledge sharing; and



Market insights: we offer our business leaders market insight, thought leadership and regular communications, supporting their ongoing development.



It was really great! The agenda was spot on, it made me ask a lot of questions, and I had the opportunity to meet other interesting CFOs.



– Alex Graves, Tour Partner Group –



The event was incredibly insightful, covering a range of hot topics and practical applications. It was a fantastic opportunity to build your network and connect with other like-minded professionals.



– Ellie Poltorak, Inclusive Employers –



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