Course Synopsis

This 3-day workshop aims to provide participants with the practical knowledge and competencies to carry out private equity investments. Module 1 on Sourcing Private Equity Deals & Fund Raising looks at a top-down approach to develop investment strategy for PE fund, starting with an overview of the PE industry and who’s who in PE – the people, the companies and the deals. At the end of the highly interactive 3-day workshop, participants will walk away with goods insights into the PE industry, and practical tips on what is needed to start the first PE fund.

Learning Objectives

- Gain overview on PE industry, the success stories and painful flops
- Know the PE investment cycle, from fundraising, deal sourcing, portfolio management to exit
- Go through fund-raising process, including search and due diligence on potential investors
- Adopt a structured approach to sourcing, screening and filtering deals
- Learn through extensive case discussions on PE deals and role play to pitch deals

Who Should Attend

- Investors, entrepreneurs, high net worth investors and family offices keen to set up PE funds
- Financial professionals such as CEOs, CFOs, accountants, business development managers who engage in PE investments
- Investment professionals such as fund managers, analysts, limited partners, endowment trustees, private bankers, looking to deepen their industry knowledge

Program Dates

18 APR to 20 APR

Thu – Sat 09:30 – 17:00

Program Fee

SGD $3,000 (excluding GST)

FICS Funding Criteria

70% FICS funding is available to eligible financial institutions and qualified individuals. Terms and conditions apply.

For Enquiries

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**Curriculum**

**Day 1**

**Introduction to Private Equity**
- Who’s who in PE – the people, the companies and the deals
- Types and structure of PE funds
- Industry trends and developments
- Case studies

**Day 3**

**Starting a Private Equity Fund**
- Documentation (PPM, LP agreements)
- Determine fund structure
- Fundraising role play – pitching to potential investor
- Evaluation and key considerations for partnership

**Day 2**

**Fund Raising & Deal Sourcing**
- PE investment cycle
- PE fund raising trends and strategies
- Identify potential investors and due diligence
- Source, screen and filter deals
- Case discussions – sniffing out opportunities to create value

**Trainer’s Biography**

**Yong Kwek Ping** is the CEO of Inventis Investment Holdings (China) Co Ltd, a leading private equity firm based in China with more than USD4.2bn of capital under management. Yong is responsible for the investment strategy and performance of the funds for the greater China region; his investment interest lies across industries such as education, retail, financial services, logistics and contract manufacturing industries. Yong is an engineer by training and a Senior Fellow of the Wharton School, University of Pennsylvania, USA. He is frequently invited to speak at major investment and business conferences globally.

**About FTI**

Since its inception in 2007, the Financial Training Institute@SMU (FTI) has established a solid reputation for quality training programs and setting high certification standards for executives and professionals in the financial services industry.

FTI has trained over 2,300 participants and certified about 600 professionals from more than 100 financial institutions, an endorsement of the strong support from the financial services industry. We have since expanded beyond professional certification programs accredited under the Financial Industry Competency Standards, to include specialist workshops in commodity trading and financing.

Looking ahead, FTI will continue to design and develop programs that facilitate progressive expertise-building across functional areas and enhancement in specific fields of expertise.