

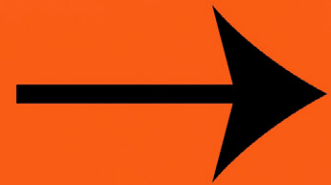
AUTUMN CONFERENCE 2022

WEDNESDAY
9 NOVEMBER

DEMOGRAPHICS

INFLATION

NAVIGATING THE *TRANSITION*



ESG

INTEREST
RATES

COST OF
LIVING

ECONOMY

WORKPLAC

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WEDNESDAY 9 NOVEMBER

08:30 – Registration & Networking Breakfast
09:15

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09:15 – Welcome & Introduction
09:30

Chris Bennett, Managing Director, Head of London Branch, DekaBank Deutsche Girozentrale
Chair – CREFC Europe

KEYNOTE

09:35 – Macro-Economic Environment
10:25
Liz Martins, UK Economist, HSBC Bank

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Liz Martins joined HSBC in 2010 in the Dubai office, where she covered 15 Middle Eastern economies, during the turbulent period of the Arab Spring, bringing HSBC's view on the region to clients across the world. In 2014, she moved to the London office to join the global and European Economics teams. Since 2016 she has led HSBC's analysis of the UK economy, including the key task of navigating the economic landscape following the UK's vote to leave the EU. She regularly presents HSBC's views to institutional and corporate clients up and down the country. She holds Bachelors and Masters degrees from Cambridge University.

10:30 – Macro-Economic Environment and the Implications for Real Estate
11:15

Join Jennie Dorsaint, Partner, Norton Rose Fulbright LLP as she interviews Industry Experts

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Andrew Burrell, Chief Property Economist, Capital Economics
Andrew Radkiewicz, Global Head of Private Debt Strategy and Investor Solutions,
PGIM - Real Estate and Private Equity

11:15 –
11:40
BREAK

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11:45 – As the Cycle Turns

12:30

- Is there a disconnect between buyers and sellers with respect to current values?
- To what extent are yields moving in this inflationary environment?
- What is the current experience relative to historic correlation between interest rates and yields?
- How are the market dynamics and fundamentals different this time vs. post GFC?
- How far reaching will the downturn be? Where might investor focus be?

Moderator: Dean Harris, Executive Managing Director, EMEA, Trimont Real Estate Advisors

Panellists:

Nigel Allsopp, Senior Director, Investment Strategy & Research, Greystar Europe
 Jeremy Tham, Head of Bank Lending Valuations, Valuations & Advisory, Knight Frank LLP
 Alison Lambert, Head of Finance Listed Markets, M7 Real Estate
 Mary Hamilton, Managing Director, Head of Asset Management, European Debt, PGIM Real Estate
 Mat Oakley, Head of UK and European Commercial Property Research, Savills

12:30 –

LUNCH

14:00

GRAB LUNCH & GO TO NETWORKING/ROUNDTABLE DISCUSSIONS

KEYNOTE

14:00 –

Keynote on Leadership in Transitional Times

14:30

**Rebecca Worthington, Chief Financial Officer, Canary Wharf Group plc,
 Board Member, Alstria Office Reit AG**



Previous roles include Chief Financial Officer of iQ Student Accommodation, Non-Executive Director at British Land plc, Chief Operating Officer at Countryside Properties. Founder and Chief Executive of Lodestone Capital Partners.

14:30 –

Financing Real Estate Market Opportunities

15:15

- In the current market turmoil, what are the challenges and opportunities that your respective businesses are now facing into?
- What is happening in the wider CRE finance market, are there trends already beginning to be seen?
- What is it really like presenting deals to Investment Committees in times like this – the do's and the don'ts?
- What is the outlook for CRE Finance over the next 12 / 24 months?

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Moderator: Arron Taggart, Head of UK Real Estate Investment, Cheyne Capital Management (UK) LLP

Panellists:

Philip Moore, Partner, Head of European Real Estate Debt, Ares
 Nicole Lux, Co-Founder FinLoop AG & Senior Research Fellow, Bayes Business School
 Klaus Betz-Vais, Head of Global Investors & Listed Clients, Real Estate & Housing, Lloyds Bank
 Eliot Kaye, Managing Director, Puma Property Finance
 Nicola Free, Managing Director, Head of CRE, EMEA, Wells Fargo Bank NA, London Branch

15:15 –
15:40 **BREAK**

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15:45 –
16:30 **Real Estate Finance: Evolution of Debt on Debt – responses to a challenging market**

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How is the current economic environment impacting debt on debt? Hear from participants in the market as to how they are responding to the current environment and preparing for the challenges ahead.

Moderator: Ruth Harris, Partner, Ashurst

Panellists:

Lorna Brown, CEO, Birchwood Real Estate Capital

James Holdsworth, Senior Director Real Estate Finance, NatWest

Duncan MacPherson, Managing Director, Head of Capital Markets, Starwood

KEYNOTE

16:30 –
17:15 **A World in Transition**
Camilla Cavendish

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Real Estate Capital



Camilla Cavendish is an award-winning journalist and former Head of the Policy Unit at 10 Downing Street under Prime Minister David Cameron. She is also the author of *Extra Time: 10 Lessons for an Ageing World*, an acclaimed examination of the dramatic demographic shift that is redefining how we should look at many aspects of society. From multigenerational workplaces and skills of the future to technology and AI, she explores the trends that are going to shape the near future.

Before joining the Policy Unit, Camilla worked as an Associate Editor, columnist and leader writer at *The Times*, before moving to the paper's Sunday sister title. Previously, she worked as a consultant for McKinsey, at media company Pearson, and served as a Non-Executive Director of the Care Quality Commission. The Secretary of State for Health also asked her to lead a review into Healthcare Assistants and Support Workers in the NHS and social care sector.

17:15 –
17:45 **Wrap Up**

Join Peter Cosmetatos, CEO, CREFC Europe and members of the Conference Planning Committee as they discuss the themes and highlights from the day.

from
17:45 **NETWORKING
DRINKS**

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THANK YOU TO OUR PLANNING COMMITTEE

Ruth Harris
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Michela Hancock
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