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Operational Due Diligence in Private Equity and Hedge Funds

There are some instances when the target company is private equity or a hedge fund. It is very easy to overlook operational aspects in these acquisitions because the buyer focuses on the past returns that the which the portfolios have provided.

Operational Due Diligence - A Framework

Private Equity Operational Due Diligence broadens the discussion surrounding operational risk assessment in private equity funds beyond the mere notions of "pass" or "fail" and fosters an increased discussion about the rights of Limited Partners to perform

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comprehensive operational due diligence reviews.

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Private Equity Operational Due Diligence, + Website: Tools ...

Private equity investors have a fiduciary duty and owe it to their clients to perform due diligence, both investment and operational, on GPs and funds, and before and after the commitment of capital. Rigorous ODD should be applied consistently across all third-party asset manager relationships, regardless of strategy.

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The Value of Operational Due Diligence on Private Equity Funds
Operational Due Diligence is increasingly a key component of the private equity diligence playbook. A thorough assessment of a target's supply chain, operations and IT infrastructure can provide investors with critical information that informs investment decisions and influences post close strategies.

Operational Due Diligence: 10 Key Questions Private Equity ...
Commercial and Financial Diligence are necessary but insufficient areas of pre-deal investigation With median holding periods falling, increasing the speed and magnitude of value capture is critical to achieve target valuations an operations transformation plan adds an element of certainty by identifying tangible

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improvement levers not dependent on growth-based assumption

□ Our approach typically leads to 20-40% improvements in EBITDA and 15-25% reductions in working capital within 12 months

PRIVATE EQUITY SUPPORT OPERATIONAL DUE DILIGENCE

According to Thomson Reuters Westlaw, the specific due diligence plan for a private equity transaction is driven by the private equity (PE) fund's underlying strategy for building value. Enhanced due diligence (EDD) refers to a deeper level of scrutiny of entities with whom a company seeks to do business.

Enhanced Due Diligence Best Practices for Private Equity ...

The Private Equity Due Diligence Checklist provides a framework

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of initial due diligence requests. These are tailored specifically to transactions involving private equities or privately-owned companies. Most suitable for transactions that involve private equities

Private Equity Due Diligence Checklist [Free Template ...

Through operational due diligence, a PE firm gets a head start on pursuing savings immediately after the deal closes, having already identified and sized up the biggest opportunities.

New Prominence For Operational Due Diligence In Private Equity
Beginning with a brief history of operational risk coupled with the unique aspects of operational due diligence on private equity funds, Private Equity Operational Due Diligence analyzes the approaches

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Valuation, legal, and financial statement risks. User-friendly flag icons throughout the text highlight key operational risk areas and deficiencies that have historically tended to signal larger problems.

Amazon.com: Private Equity Operational Due Diligence ...

In alternative investments, operational due diligence, is an investigation into operational factors of alternative investment entities such as a hedge fund, private equity fund, or infrastructure fund. ODD has gained prominence over the past years due to the failure of hedge funds such as Amaranth Advisors and the Bayou Hedge Fund Group. Also contributing to the increase of interest in this field were the actions of alleged rogue traders such as Brian Hunter and alleged Ponzi schemers such as Ar

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Operational due diligence (alternative investments ...

Alecia: To that point, private equity has probably lagged a bit behind hedge funds in terms of operational due diligence. We still see questionnaires that likely have been written for a hedge fund and have not been updated to reflect operations from a private equity fund perspective.

THE RISE OF Operational Due Diligence - Privcap

Operational due diligence as a strategic tool for prospective buyers
Historically, operational due diligence (ODD) was conducted to ensure dealmakers knew what they were buying; shedding light on the current state of operations or refining the cost baseline, particularly for carve-outs where standalone and stand-up costs had to be confirmed.

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Operational due diligence: A proactive approach to value ...

The state of operational due diligence is in flux. Private equity Limited Partners are increasingly accepting the need to perform these types of operational risk reviews. Additionally, private equity investors are broadening the scope and depth of such operational risk reviews. In summary, the results of this survey indicate:

Private Equity Operational Due Diligence Trends ...

The leading provider of operational due diligence to mid-market private equity Private equity firms seeking expert advice on operations, IT and supply chain performance of target acquisitions turn to TriVista for guidance. Quality of Operations® Due Diligence

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Operational Due Diligence - TriVista

The ILPA Due Diligence Questionnaire (ILPA DDQ) was designed to ease the administrative burden placed on private equity LPs and GPs by standardizing the most frequent and important diligence questions posed by investors.

ILPA Due Diligence Questionnaire (DDQ)

Conducting due diligence is therefore necessary – not only to select the best performers, but to avoid costly disasters. Edited by Kelly DePonte of Probitas Partners, Private Equity International's Private Equity Fund Investment Due Diligence guide is a comprehensive and practical due diligence resource for investors looking to invest in the next great fund.

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Private Equity Fund Investment Due Diligence | PEI Books ...

Deal Structuring: A Focus on Operational Control and Protecting the Downside Thorough Due Diligence Process Strong track record of sourcing proprietary transactions as demonstrated through our deal portfolio as well as pipeline through our network and strong stable of operating partners.

A step-by-step guide to develop a flexible comprehensive operational due diligence program for private equity and real estate funds Addressing the unique aspects and challenges associated with performing operational due diligence review of both private equity

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and real estate asset classes, this essential guide provides readers with the tools to develop a flexible comprehensive operational due diligence program for private equity and real estate. It includes techniques for analyzing fund legal documents and financial statements, as well as methods for evaluating operational risks concerning valuation methodologies, pricing documentation and illiquidity concerns. Covers topics including fund legal documents and financial statement analysis techniques Includes case studies in operational fraud Companion website includes sample checklists, templates, spreadsheets, and links to laws and regulations referenced in the book Equips investors with the tools to evaluate liquidity, valuation, and documentation Also by Jason Scharfman: Hedge Fund Operational Due Diligence: Understanding the Risks Filled with case studies, this book is required reading for private

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Valuation And Documentation Wiley Finance
equity and real estate investors, as well as fund managers and service providers, for performing due diligence on the noninvestment risks associated with private equity and real estate funds.

"A step-by-step guide to develop a flexible comprehensive operational due diligence program for private equity and real estate funds. Addressing the unique aspects and challenges associated with performing operational due diligence review of both private equity and real estate asset classes, this essential guide provides readers with the tools to develop a flexible comprehensive operational due diligence program for private equity and real estate. It includes techniques for analyzing fund legal documents and financial statements, as well as methods for evaluating operational

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risks concerning valuation methodologies, pricing documentation and illiquidity concerns. Covers topics including fund legal documents and financial statement analysis techniques Includes case studies in operational fraud. Companion website includes sample checklists, templates, spreadsheets, and links to laws and regulations referenced in the book. Equips investors with the tools to evaluate liquidity, valuation, and documentation. Also by Jason Scharfman: Hedge Fund Operational Due Diligence: Understanding the Risks. Filled with case studies, this book is required reading for private equity and real estate investors, as well as fund managers and service providers, for performing due diligence on the noninvestment risks associated with private equity and real estate funds"--

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How to diagnose and monitor key hedge fund operational risks

With the various scandals taking place with hedge funds, now more than ever, both financial and operational risks must be examined. Revealing how to effectively detect and evaluate often-overlooked operational risk factors in hedge funds, such as multi-jurisdictional regulatory coordination, organizational nesting, and vaporware, Hedge Fund Operational Due Diligence includes real-world examples drawn from the author's experiences dealing with the operational risks of a global platform of over 80 hedge funds, funds of hedge funds, private equity, and real estate managers.

Alternative investments such as hedge funds, private equity, and fund of funds continue to be of strong interest among the investment community. As these investment strategies have become

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Valuation And Documentation Wiley Finance increasingly complex, fund managers have continued to devote more time and resources towards developing best practice operations to support the actual trade processing, fund accounting, and back-office mechanics that allow these strategies to function. Representative of this operational growth, estimates have indicated that fund managers have seen increased operating budgets of 30% or more in recent years. In today's highly regulated environment, alternative investment managers have also increasingly had to integrate rigorous compliance and cybersecurity oversight into fund operations. Additionally, with recent advances in artificial intelligence and big data analysis, fund managers are devoting larger portions of their information technology budgets towards realizing technology-based operational efficiencies. Alternative investment fund service providers have also substantially increased

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Valuation And Distribution Wiley Finance
their scope and breadth of their operations-related services.

Furthermore, investors are increasingly performing deep-dive due diligence on fund manager operations at both fund level and management company levels. This book provides current and practical guidance on the foundations of how alternative investment managers build and manage their operations. While other publications have focused on generalized overviews of historical trading procedures across multiple asset classes, and the technical intricacies of specific legacy operational procedures, *Alternative Investment Operations* will be the first book to focus on explaining up-to-date information on the specific real-world operational practices actually employed by alternative investment managers. This book will focus on how to actually establish and manage fund operations. *Alternative Investment Operations* will be an invaluable

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up-to-date resource for fund managers and their operations personnel as well as investors and service providers on the implementation and management of best practice operations.

The missing link to determining a company's real value Most people at the M&A table know how to carry out financial and legal due diligence. Only the accomplished investors come prepared with an in-depth understanding of the complete due diligence process. Operations Due Diligence is a game-changing guide for investors who need a fully accurate determination on the sustainability of a business. Written by a hands-on operations executive who has successfully implemented process improvement programs at large and small businesses, this practical guidebook sets itself apart by providing a step-by-step strategy for analyzing the toughest area of

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Valuation And Description Wiley Finance
a business to assess: its operations. Unlike financial and legal due diligence, there were no principles such as law and accounting to guide operations due diligence—until now. This turnkey approach, based on a pragmatic series of almost 400 questions, helps you accurately assess the infrastructures of a business—its customer satisfaction, production, information management, sales and marketing, organization, and personnel, as well as its finances and legal operations. For managers and business owners looking to improve the sustainability of their business, this guided inquiry serves as a thorough operations checklist to next-level performance. Whether you are an investor trying to capture a new opportunity with minimal risk or an executive struggling to improve your business, Operations Due Diligence gives you a distinct advantage by: Going a step further than most books and illustrating how to

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analyze your discoveries Using historic examples to make the lessons both understandable and memorable Clearly explaining how and why each sector is an important indicator of the long-term sustainability of a business Conveniently locating infrastructure summary questions at the end of chapters for quick reference Providing a document checklist so nothing gets overlooked at the negotiating table The highest-valued companies and their investors know that producing the best products and services isn't enough. Survival depends on continually improving infrastructure through Operations Due Diligence.

Hedge Fund Governance: Evaluating Oversight, Independence and Conflicts summarizes the fundamental elements of hedge fund governance and principal perspectives on governance arguments.

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An authoritative reference on governance, it describes the tools needed for developing a flexible, comprehensive hedge fund governance analysis framework. Case studies and interviews with professional fund directors shine a bright light of pragmatism on this framework. The author's global analysis of more than 5,000 hedge fund governance structures enables him to draw realistic conclusions about best practices. He also explores the value consequences of good vs. bad governance, estimating the actual dollar losses that can result from bad governance, as well as the operational and investment performance benefits of certain governance practices. Presents methods for evaluating qualifications, conflicts of interests, fees, obligations and liabilities of hedge fund Boards of Directors. Explains techniques for developing a hedge fund governance assessment program, including

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Valuation legal documentation analysis and financial statements for analyzing governance related information. Uses case studies and example scenarios in hedge fund governance successes and failures to explore investor governance rights and fund manager responsibilities in onshore and offshore jurisdictions.

Develop and manage a private equity compliance program
Compliance has become one of the fastest-growing areas in the private equity (PE) space. Mirroring trends from the hedge fund industry, recent surveys indicate that PE managers rank compliance as the single most challenging aspect of their business. Reports also indicate that PE compliance spending has rapidly outpaced other PE operating costs with recent estimates indicating that individual PE funds on average spend at least 15 - 20% of their operating budgets

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Valuation And Deal Structuring Wiley Finance

on this area. General Partners (GPs) have also significantly ramped up the hiring of private equity compliance related roles. Private Equity Compliance provides current and practical guidance on key private equity (PE) compliance challenges and trends. Packed with detailed, practical guidance on developing and managing a private equity compliance program, it offers up-to-date case studies and an analysis of critical regulatory enforcement actions on private equity funds in areas including conflict of interest, fees, expenses, LP fundraising disclosures, and valuations. □ Provides real-world compliance guidance □ Offers information that is tailored to the current compliance practices employed by GPs in the private equity industry. □ Provides guidance on managing the compliance risks associated with cybersecurity and information technology risk □ Serves as a PE-focused complement to the author's previous book,

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Hedge Fund Compliance If you're a private equity investor or compliance officer looking for trusted guidance on analyzing conflicts, fees, and risks, this is one reference you can't be without.

How will the funds of hedge funds (FoHF) business have to change to survive in the wake of the 2008-2012 financial crisis? This new research provides valuable insight. **Reconsidering Funds of Hedge Funds** presents the first comprehensive views of UCITS as well as recent trends in due diligence, risk management, and hedge fund deaths and survivors. The book contains original chapters by 22 academics and 16 hedge fund professionals, and includes two sections on performance: one that looks at UCITS FoHF and one that deals with traditional FoHF performance. Most chapters examine aspects of the 2008-2012 financial crisis, and almost every

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chapter addresses fund of hedge funds' management process before, during, and after the crisis. Covers recent advances in risk management, due diligence, tail risk, and allocation Presents an in-depth analysis of UCITs Balances academic and professional viewpoints

This overview of a complex and often misunderstood subject takes the reader through the issues that are faced throughout the life cycle of a private equity investment, from the identification of an opportunity, through the various stages of the transaction and the lifetime of the investment, to the eventual exit by the investor. The analysis of key documentation and legal issues covers company law, employment law, pensions, taxation, debt funding and competition law, taking into account recent legal developments

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such as the Companies Act 2006, the recent emergence of private equity in the UK and the challenges faced by the industry as a result of the financial crisis.

The long-awaited guide for modern hedge fund compliance program development *Hedge Fund Compliance + Website* provides straightforward, practical guidance toward developing a hedge fund compliance program, drawn from the author's experience training financial regulators, consulting with government entities, and analyzing hedge fund compliance structures across the globe. In-depth explanations of compliance principles are backed by illustrative case studies and examples. Highly in-demand templates of popular hedge fund compliance documentation provide actionable illustrations of key compliance policies. Designed to

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assist investors, fund managers, service providers, and compliance job seekers directly, this book describes the fundamental building blocks of the hedge fund compliance function. Compliance is one of the fastest growing areas in the hedge fund space. This reference book provides an essential foundation in modern hedge fund compliance, reflecting the recent changes of this dynamic field. Design and run a hedge fund compliance program Access templates of core compliance documentation and checklists Discover how investors can evaluate and monitor compliance programs Interviews with hedge fund compliance practitioners A steady stream of regulatory changes, combined with the enhanced enforcement efforts of regulators, ensure that hedge funds' compliance-related expenditures will continue to grow. While hedge fund compliance legislation continues to evolve globally, little practical guidance

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exists for those tasked with the boots-on-the-ground aspects of developing an actual compliance program to comply with best practices and regulatory guidance from leading hedge fund regulators including the US Securities and Exchange Commission, the National Futures Association, the Commodity Futures Trading Commission and the United Kingdom's Financial Conduct Authority. Hedge fund professionals and investors need a fundamental framework for establishing and evaluating an effective program, and when compliance is the issue, trial and error carries too much risk. Hedge Fund Compliance + Website provides clear guidance and practical tools to meet today's compliance professional needs.

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