



Effective Due Diligence

24 – 31 March 2023, Online

training@inrev.org
+31 (0)20 235 86 02
www.inrev.org

Friday 17 March

10:00 – 10:45 (CET)

Participants' introduction call
INREV

Friday 24 March

10:00 – 10:45 (CET)

Course introduction

Alexander Tilson, Primonial REIM (Course leader)

- Welcome by INREV
- Course introduction and objectives, case study explanation
- The role of due diligence in today's market
- Quiz

10:45 – 11:30 (CET)

The due diligence process from the investor's perspective - Part I

Yno van Haaster, Blue Sky Group

- How to organise an effective due diligence process
- The role of INREV's tools
- Trends in the process

11:30 – 11:45 (CET)

Coffee break

11:45 – 12:30 (CET)

The due diligence process from the investor's perspective - Part II

Philipp Roepke, PIMCO

- Investment philosophy
- Selection criteria – track record, cultural fit and weighing of factors
- Alignment of interest



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Wednesday 29 March

10:00 – 11:00 (CET)

The due diligence process from the manager's perspective

Helena Ekström, Areim

- Preparation for due diligence
- Mapping and managing the process
- The role of INREV's tools
- Importance of transparency

11:00 – 11:15 (CET)

Coffee break

11:15 – 12:30 (CET)

Case Study – Part I

All



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Thursday 30 March

10:00 – 11:00 (CET)

Legal due diligence

Clare Baker, Linklaters

- Overview of the process, roles and responsibilities
- Key issues including distributions, governance and exits
- Latest developments and trends

11:00 – 11:15 (CET)

Coffee break

11:15 – 12:15 (CET)

How to incorporate Environmental and Social factors

Olivia Muir, UBS Asset Management

- The role of sustainability and environmental issues
- Development and drivers of ESG due diligence in the regulatory environment
- Integration of social and governance factors

12:15 – 12:30 (CET)

Additional Q&A



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Friday 31 March

10:00 – 11:00 (CET)

The role of risk management and operational due diligence

Rutger Leliveld, PGGM

- The role of risk management in the due diligence process
- Key risks relevant for non-listed real estate investments and how to identify them
- How to assess a manager's capability to manage and mitigate risks
- How to organise an operational due diligence

11:00 – 11:15 (CET)

Coffee break

11:45 – 12:45 (CET)

Case Study – Part II

All

12:45 – 13:00 (CET)

Course wrap-up

Alexander Tilson, Primonial REIM