

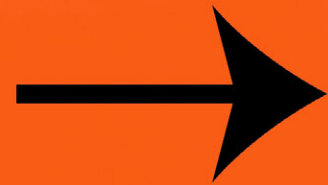
# AUTUMN CONFERENCE

2022 WEDNESDAY  
9 NOVEMBER

DEMOGRAPHICS

INFLATION

## NAVIGATING THE *TRANSITION*



ESG

INTEREST  
RATES

COST OF  
LIVING

ECONOMY

WORKPLAC

ATION

Fruit & Wool Exchange, 1 Duval Square, London, E1 6PW

We have applied for CPD Accreditation and expect to hear back by 14 October

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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 in London. 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 Paul Norman, Managing Editor UK and Europe, CoStar News as he 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 – BREAK**  
**11:40**

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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?
- What is the likelihood of a recession and how far reaching will it be? Who will be the winners and losers?

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

**Panellists:**

Nigel Allsopp, Senior Director, Investment Strategy & Research, Greystar Europe

Jeremy Tham, Partner, Head of Bank Lending Valuations, Knight Frank

Alison Lambert, Senior Vice President, Head of Finance Europe, Oxford Properties Group

Mary Hamilton, Managing Director, PGIM

Mat Oakley, Head of UK and European Commercial Property Research, Savills

**12:30 –**

**LUNCH**

**14:00**

**GRAB LUNCH & GO TO NETWORKING/ROUNDTABLE DISCUSSIONS**

**Topics to be confirmed**

**KEYNOTE**

**14:00 –**

**Keynote on Leadership in Transitional Times**

**14:30**

**14:30 –**

**Financing Thriving Real Estate Market Opportunities**

**15:15**

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- Post Brexit, post-Covid and in current economic climate, what opportunities are real estate owners / investors pursuing and proposing to lenders?
- What is happening in CRE finance – is the market pausing or are there still opportunities for new business?
- What is the outlook for CRE Finance?
- Should lenders prepare for higher level of distress and recovery work?

**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

Madeleine McDougall, Managing Director – Real Estate & Housing, Lloyds

Eliot Kaye, Managing Director, Puma Property Finance

Nicola Free, Managing Director, Head of CRE, EMEA, Wells Fargo Bank NA, London Branch

**15:15 –**

**BREAK**

**15:40**

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

Traditional CMBS/CLO markets might have slowed and some lenders may be finding the traditional origination and syndication environment challenging, however those looking for exposure to real estate debt are finding innovative ways to get a slice of the action. We'll explore how, who and why.

**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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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**

Planning Committee observations & key take aways

from **17:45** **NETWORKING DRINKS**

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## THANK YOU TO OUR PLANNING COMMITTEE

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Ashurst

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Moody's Investors Service

Dean Harris  
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