

SAMPLE – EXTRACTED FROM FULL SPEECH

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The Next 10,000 Days – A View to 2050

Private Markets & their Role in Effecting Change

January 2024

Time Partners

**Independent
private market
expertise**

- Advice to institutions and family offices
- Focus on private markets – PE investment programmes
- Specialists in PE fund selection, without conflict
- Specialists in sustainability and impact
- Strategic operational, financial and investment planning

Private Markets

- Build PE Portfolios over time – compounding returns

- Embrace and back the trends of the future

- Entrepreneurship & innovation in the private markets → true alpha

- Controlled, disciplined investment paces

- Co-investment opportunities

- Agree strategy with your adviser first

- Build your model

- Funds drive core portfolio strategy

Businesses – Dynamic Change

Industries

- Industries around the globe disrupted
- Capital will flow to industries and firms that are more capital efficient and more sustainable
- Compete on returns **and** sustainability metrics (i.e. IRR + ERR)

Firms

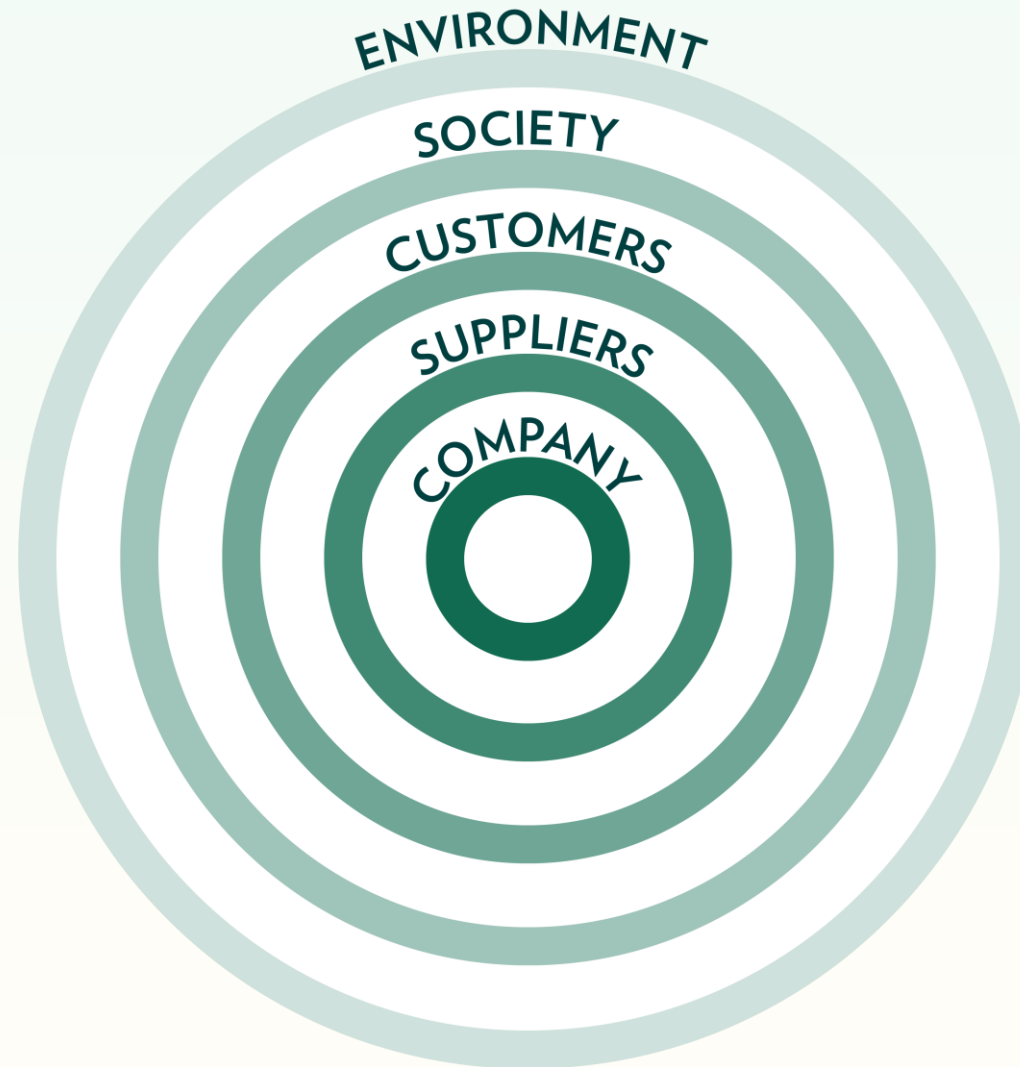
- Firms' lifespans are shrinking as large, monolithic firms have difficulty keeping up with the pace of innovation in startups
- Contract and remote work grows – reducing urbanisation

Measuring Impact

Measuring the full impact of business decisions becomes normal in annual reporting

New drivers of Capital →

The ERR reports will show your external impacts, both positive and negative



Within 20 years, the new company

- Disruptive innovation
 - Just-in-time organisations, minimising use of capital
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- Humans and machines to maximise productivity
 - Light-weight, short-lived organisations
 - Develop people
 - Wholly sustainable business practices
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- Short tenures – growth in self-employment
 - Growth of self-ownership / co-owners
 - Embracing opinion and public pressure (transparency)
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- Benefit Corps formed at the level of Articles
 - ERR reports complement Annual Reports

Contact

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