



Private Equity Investment and Value Creation Course

27 September – 1 October 2027
San Diego



Private Equity Investment and Value Creation Course

Ref: 439_135472 **Date:** 27 September – 1 October 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Private Equity Investment and Value Creation Course is a five-day foundation course for investment analysts, corporate finance professionals, fund operations staff, transaction support teams, and finance managers, who leave with a Private Equity Investment Case. The course connects fund structures, fundraising, deal screening, due diligence, valuation, transaction terms, portfolio governance, value creation, monitoring, and exit analysis in one decision process. Agile Leaders Training Center provides foundation training in private equity investment and value creation.

Who Should Attend

- Investment functions responsible for screening private company opportunities
- Corporate finance functions responsible for valuation and transaction analysis
- Fund operations functions responsible for commitments, records, and reporting
- Transaction support functions responsible for due diligence coordination
- Finance management functions responsible for investment cases and monitoring
- Portfolio support functions responsible for governance and value initiatives

The course assumes participants already work with financial statements, business plans, or investment information and leaves out advanced fund administration, legal drafting, and country-specific regulation.

Departments and Industries

The course supports departments that analyze, finance, execute, monitor, or govern private investments across financial and operating sectors.

- Private equity and private markets investment teams
- Banking, corporate finance, and transaction advisory functions
- Fund operations, reporting, and investor-relations departments
- Portfolio-company strategy, finance, and operations teams
- Family offices, holding companies, and institutional investment functions
- Professional services and industrial corporate-development teams

Learning Objectives

By the end of this course, participants will be able to:



- Apply a private equity fund lifecycle map to financing decisions
- Use deal sourcing and screening criteria to prioritize opportunities
- Analyze commercial, financial, and operational due diligence evidence
- Build valuation ranges and compare transaction structures
- Evaluate portfolio governance, value creation, and monitoring plans
- Develop an integrated investment committee case and exit analysis

Course Agenda

Day 1: Fund Structure and Investment Context

- Private Equity Fund Lifecycle Map
- General Partner and Limited Partner Role Matrix
- Fundraising and Capital Commitment Flow
- Management Fee and Carried Interest Model
- Investment Mandate and Target Profile Canvas

Day 2: Deal Sourcing and Due Diligence

- Deal Origination Pipeline Board
- Opportunity Screening Scorecard
- Commercial Due Diligence Question Map
- Financial Due Diligence Evidence Schedule
- Operational and Governance Risk Register

Day 3: Valuation and Transaction Structure

- Comparable Company Valuation Range
- Discounted Cash Flow Assumption Sheet
- Entry Price and Return Driver Bridge
- Debt and Equity Structure Scenario
- Investment Committee Decision Memo

Day 4: Ownership and Value Creation

- Portfolio Governance Responsibility Matrix
- Operational Value Creation Plan
- Strategic Initiative Prioritization Grid
- Portfolio Performance Monitoring Dashboard
- Exit Route and Timing Analysis



Day 5: Private Equity Investment Practice

- Exercise: Fund Structure and Commitment Review
- Exercise: Deal Screening and Due Diligence Assessment
- Exercise: Valuation and Transaction Structure Comparison
- Exercise: Value Creation and Exit Scenario Review
- Capstone Exercise: Private Equity Investment Case

Practical Exercises

The course includes the following suggested activities:

- Suggested activity: map fund participants, commitments, fees, incentives, and investment stages into one lifecycle view.
- Suggested activity: screen a target and organize commercial, financial, operational, and governance evidence in a due diligence plan.
- Suggested activity: compare valuation ranges, capital structures, return drivers, and exit routes under alternative assumptions.
- Suggested activity: assemble a committee memo, value creation plan, monitoring dashboard, and exit analysis into an investment case.

FAQs

Who suits the private equity investment course, and what does it assume?

The course suits investment, corporate finance, fund operations, transaction support, and portfolio functions and assumes workplace exposure to financial statements, business plans, or investment information.

How does private equity investment training differ from advanced leveraged buyout modeling?

Private equity investment training covers the full fund and deal lifecycle at foundation level, while advanced leveraged buyout modeling concentrates on detailed debt schedules, model mechanics, and return sensitivities.

What creates value in a private equity investment?

Private equity value can come from strategic repositioning, revenue improvement, operating efficiency, governance, capital structure, acquisitions, and exit execution, with each initiative linked to evidence and monitored results.



How is due diligence used in private equity deals?

Due diligence tests commercial, financial, operational, governance, and transaction assumptions so decision makers can identify risks, validate the investment thesis, and define required actions.

How are private equity exit routes compared?

Exit routes are compared by buyer type, timing, readiness, market conditions, execution risk, proceeds, and their effect on the investment case and expected returns.

Conclusion

Participants take back a Private Equity Investment Case containing a fund lifecycle map, screening scorecard, due diligence plan, valuation range, transaction structure, committee memo, value plan, monitoring dashboard, and exit analysis. The case connects financing, investment selection, ownership actions, and returns in one decision record. It gives teams a working basis for reviewing opportunities and tracking portfolio priorities.