

First-time Funds Series

What should you know before setting up a private fund for the first time? Watch our panel series on first-time funds, where members of Torys' Private Equity team discuss the process of launching a first-time fund stage by stage, with key considerations and practical takeaways highlighted throughout.

Video #11: High-net-worth Individuals – Retail Funds

06:19

In the 11th and final video of our first-time funds series, [Guillaume Lavoie](#) and [Ana Ioanas](#) of our Private Equity practice discuss funds focused for high-net-worth individuals, also known as retail funds, and what needs to be considered for a fund raised for individual investors, including:

- dealing with liquidity concerns for individual investors;
- closed-end funds; and
- calling capital upfront to reduce risks of default.

[Click here](#) for a transcript of this video.

First-time Funds Series: Strategy and marketing



Video #1: Developing a Strategy and Targeting Investors

Our Private Equity group introduces the first-time funds video series and explores preliminary fund formation considerations when developing a strategy and targeting investors.

JAN 27, 2022



Video #2: Fund Structures

Watch Venera Ziegler and Anthony Bishop of our Private Equity practice discuss limited partnerships and structures of funds.

JAN 27, 2022



Video #3: Marketing the Fund and Settling Key Terms

Watch Shannon Gotfrit and Cal Hunter unpack marketing first-time funds and tips in promoting funds to prospective buyers.

JAN 27, 2022



Video #4: Drafting Legal Documents and Finalizing Terms

Mark Morrison and Colby Harris focus on drafting legal documents and finalizing terms for the fund.

FEB 8, 2022



First-time Funds Series: Investments and economics

First-time Funds Series: Other considerations



Video #9: Remedies

Watch Batya Nadler and Aaron Hunt of our Private Equity practice discuss remedies typically available to investors.

APR 27, 2022



Video #10: Securities Law Considerations

Watch Michele Clarkin and Liam Pedersen of our Private Equity practice provide a summary of the key securities issues pertaining to exempt market fund offerings in Canada and the United States.

JUN 13, 2022



Video #11: High-net-worth Individuals – Retail Funds

Watch Guillaume Lavoie and Ana Ioanas of our Private Equity practice discuss funds focused for high-net-worth individuals, also known as retail funds, and what needs to be considered for a fund raised for individual investors.

JUN 28, 2022

