



**PRIVATE EQUITY  
INTERNATIONAL**

# Investor Relations Marketing & Communications Forum 2019

**Carve your niche in PE  
investor relations, marketing &  
communications**

**June 19-20 | Convene, 730 Third Ave | New York  
[events.privateequityinternational.com/investor-relations](https://events.privateequityinternational.com/investor-relations)**

Now in its 14th year, the **Investor Relations, Marketing and Communications Forum** continues to be the biggest North American event dedicated to addressing the latest PE and VC investor relations, marketing and communications strategies.

Join us this year to hear from industry thought leaders on how the IR role is evolving, what the future holds for the investor relations & marketing community, and how to stay at the forefront of fundraising.



# Meet the advisory board

Lending their industry expertise, the board members contribute to a content rich & thought provoking program, sharing their perspectives and concerns for today's IR professionals.



**Mary Armstrong**

Senior Vice President,  
Global Head of  
Marketing and  
Communications  
**General Atlantic**



**Charles Bauer**

Managing Director,  
Head of Investor  
Relations  
**EnCap Investments**



**Karen Bommart**

Head of Investor  
Relations  
**Battery Ventures**



**Caitlin Brodie**

Principal  
**The Carlyle Group**



**Graham Hearn**

Managing Director and  
Chief of Staff  
**The Riverside  
Company**



**David Lippin**

Managing Director  
and Head of Investor  
Relations  
**One Equity Partners**

*"It was a great event, well put together, fast paced, and interesting topics, very good and relevant."*

**Sarah Clawson, New Forests**

Learn more online at:  
[events.privateequityinternational.com/investor-relations](https://events.privateequityinternational.com/investor-relations)

# Agenda highlights

**Wednesday, June 19, 2019**

7:50 **Women in Private Equity Breakfast:** Explore what it's like being a woman in PE investor relations, marketing & communications

9:00 **LP appetites and perspectives:** what really matters to investors?

9:40 **Scaling your investor relations with technology**

10:20 **Sharing emerging ideas and best practices in IR, marketing, & communications**

11:30 **ESG due diligence: mitigating risks and uncovering opportunities**

12:10 **Building and protecting your reputation at every juncture**

1:45 **Breakout series I**

**Track A | Leveraging content marketing to differentiate your PE brand in a crowded market**

**Track B | Roundtable: Investor relations "horror stories" and headwinds**

2:30 **Breakout series II**

**Track C | Roundtable: Career advice for marketing & communications professionals**

**Track D | Career advice for investor relations professionals**

3:10 **Breakout series III**

**Track E | Roundtable: Leveraging digital marketing and social media platforms**

**Track F | LPAC best practices**

4:00 **Fundraising campaign management: sharing war stories**

4:30 **Interactive main room working groups**

*This session will allow the audience to break into interactive roundtable discussions in the main presentation room with designated facilitators at each table. Key areas will be covered per table to share best practices.*

View full agenda online at:

**[events.privateequityinternational.com/investor-relations](https://events.privateequityinternational.com/investor-relations)**

# Agenda highlights

Thursday, June 20, 2019

8:00 Two invitation-only think tanks for both IR and marketing/communications professionals

9:20 The new IR frontier: closing the data gap with your LPs

10:00 The rise of the secondary market: figuring out your niche in fund restructurings

10:40 AGMs: tips and tricks to be better prepared for your "Super Bowl"

11:30 Press relations: why communications is a key to a company's success

12:00 A day in the life of an LP

12:30 Presentation sensation - why you can no longer afford to just be an average speaker



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# Confirmed speakers include



**Mary Armstrong**  
Senior Vice President,  
Global Head of Marketing  
& Communications  
General Atlantic



**Karen Bommart**  
Head of Investor Relations  
Battery Ventures



**Caitlin Brodie**  
Principal  
The Carlyle Group



**Allison Cole**  
Managing Director, Head  
of Fundraising & Investor  
Relations  
Lightyear Capital



**Michelle Daubar**  
Principal & Head of  
Investor Relations &  
Communications  
Oak HC/FT



**Laura Fahrney**  
Principal, Director of  
Investor Relations  
Ridgemont Equity  
Partners



**Kathlika Fontes**  
Director of Investor  
Relations  
Grain Management



**Amy Harsch**  
Managing Director,  
Investor Relationships  
American Securities



**Frances Higgins**  
Managing Director of  
Investor Relations  
Welsh, Carson, Anderson  
& Stowe



**Kathryn Kantarian**  
Principal - Director of  
Investor Relations  
Siguler Guff & Company



**Robert Kaufman**  
Vice President,  
Investor Relations &  
Communications  
FTV Capital



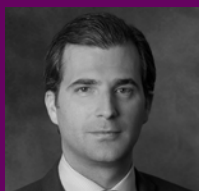
**David Lippin**  
Managing Director and  
Head of Investor Relations  
One Equity Partners



**Angeli Stirbei**  
Vice President, Marketing  
& Client Relations  
Prologis



**John Thompson**  
Global Communications  
Director  
Actis



**Philip Viergutz**  
Managing Director, Head  
of Business Development  
& Investor Relations  
AlpInvest Partners



**Rick Walsh**  
Partner and Head of  
Investor Relations  
Court Square Capital  
Partners

Interested in speaking?

Contact Marc Mele at [marc.m@peimedia.com](mailto:marc.m@peimedia.com) or +1 646 581 9295

## 250+ attendees from 100+ firms, including:

- » Alcion Ventures, L.P.
- » AlInvest Partners
- » AltaReturn
- » BackBay Communications
- » Battery Ventures
- » Bentall Kennedy
- » Blackstone
- » Brightstar Capital Partners
- » Brookfield Asset Management
- » CarVal Investors
- » CCMP Capital Advisors
- » Clayton Dubilier and Rice LLC
- » Coller Capital
- » Court Square Capital Partners
- » Crescent Capital Group
- » CrossHarbor Capital Partners
- » CVC Capital Partners
- » Duff & Phelps
- » Edelman
- » Edge Natural Resources LLC
- » eFront
- » EnCap Investments
- » Energy Capital Partners
- » eVestment
- » Francisco Partners
- » Frazier Healthcare Partners
- » Frontier Capital
- » FTV Capital
- » Gennx360 Capital Partners
- » Global Infrastructure Partners
- » Goldman Sachs
- » Hamilton Lane
- » HCI Equity Partners
- » IFC
- » IFM Investors
- » Insight Equity
- » ILPA
- » Intralinks
- » Invesco
- » Ivanhoé Cambridge
- » Kainos Capital
- » KKR
- » KPS Capital Partners
- » Landmark Partners
- » Leonard Green & Partners
- » Lexington Partners
- » Macquarie Infrastructure
- » New Mountain Capital
- » New Spring Capital
- » Oak HC/FT
- » One Equity Partners
- » Onex
- » Paine Schwartz Partners LLC
- » Partners Group
- » Prologis
- » Providence Equity Partners
- » The Riverside Company
- » Searchlight Capital Partners
- » Star Mountain Capital
- » StepStone Group
- » Stonelake Capital Partners
- » TPG Capital
- » Varde
- » Victory Park Capital LLC
- » Warburg Pincus
- » Welsh, Carson, Anderson & Stowe

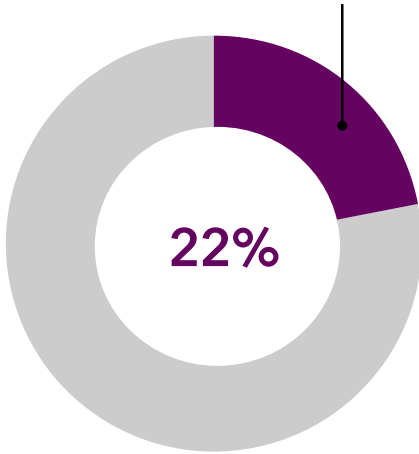
View the whole previous attendee list at :

[events.privateequityinternational.com/investor-relations](https://events.privateequityinternational.com/investor-relations)

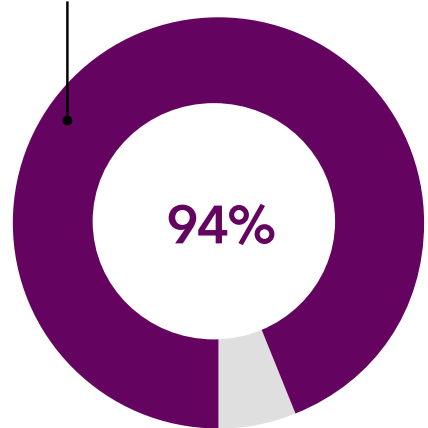
# Looking at the importance of the investor relations role

There's no denying the importance of investor relations at every stage of the fundraising cycle. IR has become the deciding factor between general partners if other factors were equal.

Yes, we have taken the the approach of organizing a "due diligence" day for investors

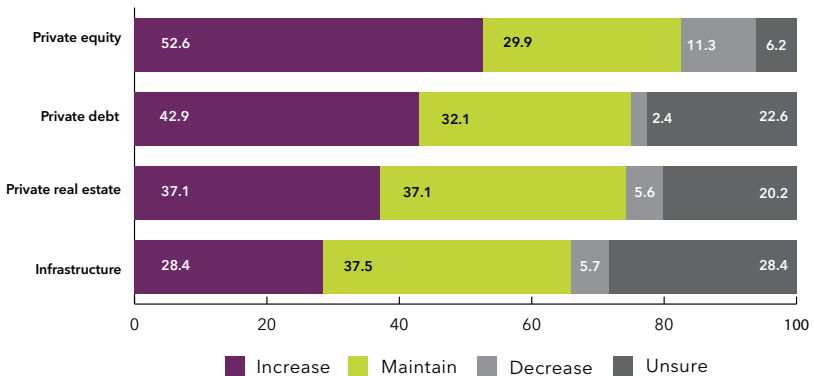


Attendees agree that a strong IR effort when not fundraising will shape the outcome when an LP is making a decision to invest



Source: PEI Investors Relations & Communications 2018 Forum

## Thinking of your current fund manager relationships, would you like to increase, maintain or decrease the number of relationships?



Source: Private Equity International LP Perspectives



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*"Excellent event.  
Great networking  
and best practice  
sharing."*

**Aaron Rudberg**  
Baird Capital

# Pricing

**General delegate**

**Advance price:** US \$2,395 (**Save \$700** - ends March 15th)

**Preferred price:** US \$2,595 (**Save \$500** - ends April 26th)

**Full price:** US \$3,095 (after April 26th)

**Qualified investors\***

Complimentary

\* Approval upon review

# Registration



**Email**

regny@peimedia.com



**Online**

events.privateequityinternational.com/investor-relations



**Phone**

+1 212 633 1073

## Venue

**Convene**

730 Third Ave, 17th floor  
New York, NY 10017

## Hotel accommodations

**Grand Hyatt**

109 East 42nd Street  
New York, NY 10017