

Private Equity
International

Investor Relations Marketing & Communications Forum

Virtual experience 2020

September 2-3 | Available anywhere

**The largest global event for PE Investor
Relations, Marketing & Communications**

PEI



A new virtual experience



Customize your agenda

Mix and match 3 think tank selections, 3 interactive discussion rooms, 12 breakouts and panel sessions to your liking for a personalized event experience



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Enjoy the Forum from the comfort of your home office and on-demand access for up to 12 months after the event is over



Industry leading IR and marketing content

The Forum's in-depth sessions are designed to help you formulate effective plans and develop crucial strategies to attract investors



A new kind of networking

Gain early access to the attendee list and start scheduling 1-to-1 or small group meetings or direct message fellow attendees in advance



Built-in calendar and automated reminders

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Networking lounges

Explore and meet with industry service providers to discover the latest trends and technologies

Speakers include



Marilyn Adler
Managing Partner
Mizzen Capital



Nicole Adrien
Chief Product Officer
and Global Head of
Client Relations
Oaktree Capital



Christine Anderson
Senior Managing
Director, Global Head
of Public Affairs &
Marketing
Blackstone



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



Michael Bane
Head of US Investor
Relations
Ardian



Devin Banerjee
Senior Editor, Financial
Services
LinkedIn



Charles Bauer
Partner, Head of Investor
Relations
EnCap Investments



Gina Bauman
Senior Vice President of
Marketing and Investor
Relations
IVP



Stephanie Bednar
Vice President, Marketing
& Investor Relations
Gryphon Investors



Karen Bommart
Head of Investor
Relations
Battery Ventures



Caitlin Brodie
Managing Director
The Carlyle Group



Erik Cafarella
Partner, Nebrodi
Partners



Renee Calabro
Executive Vice President,
Head of Capital Markets
Communications
Edelman



Tracy Chadwell
Founding Partner
1843 Capital



Carolyn Chen Warner
Director of Investor
Relations
**Bruckmann, Rosser,
Sherrill & Co. (BRS)**

Speakers include



Matthew Coad
Principal, Investor Relations
Victory Park Capital



Kerrie Cohen
Head of Communications,
Americas
Warburg Pincus



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



Andrew Collins
Director of ESG Investing
San Francisco Employees'
Retirement System
(SFERS)



Michael Dalton
Managing Director
Quantum Energy Partners



Michelle Daubar
Partner, Investor Relations
& Communications
Oak HC/FT



Kristy DelMuto
Vice President of Strategic
Marketing
LLR Partners



Irene Hong Edwards
Principal, Head of Investor
Relations
Lovell Minnick Partners



Michael Elio
Partner
StepStone Group



Raed Elkhatib
President and CEO,
Atlantic-Pacific Capital



Cathleen Ellsworth
Managing Director
BlackRock



Graeme Faulds
Director of Private Equity
Solutions
eVestment



Thomas Franco
Partner
Clayton, Dubilier & Rice



Mike Geller
Partner
Prosek Partners



Patricia Grad
Senior Managing Director,
Head of Investor Relations
Arsenal Capital Partners

Speakers include



Ryan Green
Director, Business
Development
Abbott Capital



Lindsay Grider
Head of Investor Relations
Tailwater Capital



Priscilla Guevara
Head of Investor Relations
Science Ventures



Tracy Harris
Partner, Investor Relations
and Product Strategy
Siris Capital



Brett Hickey
CEO
Star Mountain Capital



Michael Hong
Partner
Davis Polk



Alison Humphrey
Director, ESG
TPG Global



Archie Hunter
Director
Landmark Partners



Jennifer James
Managing Director,
Investor Relations &
Marketing
Thoma Bravo



Franny Jones
Managing Director,
Investor Relations
The Sterling Group



Kimberly Kile
General Partner
ABS Capital Partners



John Kim
Managing Director
General Catalyst



Ryan Lavin
Vice President, Investor
Relations
The Carlyle Group



Alexandra Lebenthal
Senior Advisor
Empire Global Ventures



Lisa Lee
Managing Director,
Business Development
Providence Equity
Partners

Speakers include



Daniel Lee
Head of Fundraising &
Investor Relations, North
America
17Capital



Ari Levine
Communications Director
Unigrains



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



**Maggie Littlefield
Sahlman**
Head of Investor Relations
**Charlesbank Capital
Partners**



Megan Lundy
Managing Director
Audax Group



Campbell MacColl
Partner
Harvest Partners



Ken MacFadyen
Senior Vice President,
Head of Content
Development



Shant Mardirossian
Partner, Chief Operating
Officer
**Kohlberg & Company
BackBay Communications**



Kate McGann
Vice President, Public
Relations
Hamilton Lane



Elizabeth Medb Lewis
Senior Engagement
Officer
**International Finance
Corporation (IFC)**



Emily Melchior
Managing Director, Head
of Investor Relations &
Chief of Staff
**Searchlight Capital
Partners**



Roseita Monteiro
Director, Business
Development & Investor
Relations
**Manulife Investment
Management Private
Equity & Credit**



Katie Moore
Managing Director
Hamilton Lane



Christen Paras
Director, Head of Business
Development & Investor
Relations
MiddleGround Capital



Bijal Patel
Director, Investor
Development Group
Actis

Speakers include



Allan Petersen
Managing Director,
Investor Relations
Nautic Partners



Gina Lee Peyton
Head of Capital Formation
& Partner
Castlelake



Kathleen Richmond
Director of Marketing
Serent Capital



Jim Rutherford
Managing Director, Head
of Investor Relations
Pine Brook Partners



Alixé Ryan
Director, Investor
Relations
Denham Capital



Alexander Samuelson
Global Head of Media
Relations
Neuberger Berman



Emily Schillinger
Vice President of Public
Affairs
**American Investment
Council**



**Caroline
Schimmelbusch**
Director, Capital
Development, Europe
Bregal Investments



Gary Sernovitz
Managing Director
Lime Rock Partners



Meghan Slentz
Head of Partner Relations
and Marketing
Pritzker Private Capital



Sarah Smith
Principal, Limited Partner
Services
Advent International



John Thompson
Head of Communications
Actis



Andrew Tirbeni
Vice President
Fundraising, West Coast
Distribution
TPG Global



Charles van Horne
Senior Advisor
Abbott Capital



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

Speakers include



Amy Weisman
Managing Director
Sterling Investment Partners



Andrea Williams
Head of Corporate
Communications and
Branding
Oaktree Capital



Kristin Williamson
Principal, Head of Corporate
Marketing & Communications
Hamilton Lane



Dan Winters
Head of Americas
GRESB



Dodson Worthington
Principal
Churchill Asset Management



Joanne Yoo
Managing Director
Development Partners
International (DPI)



Stephen Ziff
Partner, Co-Head of Investor
Relations and Fundraising
Coller Capital



“I have attended a lot of conferences in my career and this was by far the best conference I have ever attended. Practically every panel left me wanting even more information.”

Michelle Ball
HKW, Inc.



“The only conference I have found for the marketing/communications professional specifically within private equity. It's two days full of applicable content that is very hard to find elsewhere.”

Kelsey Clute
HCI Equity Partners

Connect with the people you need to know

Confirmed attendees include:

- » Abbott Capital
- » Altas Partners
- » American Securities
- » Aquiline Capital Partners
- » Argosy Capital
- » Audax Group
- » Basis Investment Group
- » BentallGreenOak
- » Berkshire Partners
- » Bertram Capital Management
- » BlackRock
- » Brightstar Capital Partners
- » CarVal Investors
- » Castlelake
- » Churchill Asset Management
- » Clayton, Dubilier & Rice
- » Cornell Capital
- » Court Square Capital Partners
- » Crestview Advisors
- » Elevar Equity
- » Franklin Templeton Private Equity
- » Frontier Capital
- » Further Capital Partners
- » General Atlantic
- » General Catalyst
- » GI Partners
- » GoldPoint Partners
- » Goodwell Investments
- » Harbor Group International
- » Harrison Street
- » HGGC
- » IFM Investors
- » Insight Equity
- » Invesco Real Estate
- » Kainos Capital
- » Kohlberg & Company
- » L Catterton
- » LEM Capital
- » Leonard Green & Partners
- » Levine Leichtman Capital Partners
- » LLR Partners
- » Manulife Investment Management Private Equity & Credit
- » Marlin Equity Partners
- » Mercato Partners
- » Metropolitan Partners Group
- » Monroe Capital
- » Nautic Partners
- » New Mountain Capital
- » New Spring Capital
- » Paine Schwartz Partners
- » Pine Brook Partners
- » Providence Equity
- » Quantum Energy Partners
- » Rhone Group
- » Riverstone Holdings
- » San Francisco Employees' Retirement System (SFERS)
- » Serent Capital
- » StepStone Group
- » Sterling Investment Partners
- » Stockbridge Capital
- » Strattam Capital
- » TA Associates
- » Texas A&M Foundation
- » The Riverside Company
- » The Sterling Group
- » Thomas H Lee Partners
- » TPG
- » Trilantic Capital Partners
- » Trive Capital
- » Unigrains
- » Unison Capital
- » Verdane Capital
- » Victory Park Capital
- » Warburg Pincus

Day 1 Agenda highlights

» Women in Private Equity Breakfast (invitation-only)

Group A

- Facilitators:
 - » **Lisa Lee**, Managing Director, Business Development, Providence Equity Partners
 - » **Joanne Yoo**, Managing Director, Development Partners International (DPI)

Group B

- Facilitators:
 - » **Franny Jones**, Managing Director, Investor Relations, The Sterling Group
 - » **Megan Lundy**, Managing Director, Audax Group

» A day in the life of an LP – how things have changed this year

- » **Rick Walsh**, Partner and Head of Investor Relations, Court Square Capital Partners
- Interviewees:
 - » **Erik Cafarella**, Partner, Nebrodi Partners
 - » **Dodson Worthington**, Principal, Churchill Asset Management

» IR in an economic downturn – navigating a crisis from a PE perspective

- Moderator:
 - » **Nicole Adrien**, Chief Product Officer and Global Head of Client Relations, Oaktree Capital
- Panelists:
 - » **Matthew Coad**, Principal, Investor Relations, Victory Park Capital
 - » **Shant Mardirossian**, Partner, Chief Operating Officer, Kohlberg & Company
 - » **Gina Lee Peyton**, Head of Capital Formation & Partner, Castlelake
 - » **Stephen Ziff**, Partner, Co-Head of Investor Relations and Fundraising, Collier Capital

» Expert Panel: What we have learned about the IR role in 25 Years

- Moderator:
 - » **Charles van Horne**, Senior Advisor, Abbott Capital
- Panelists:
 - » **Tracy Chadwell**, Founding Partner, 1843 Capital
 - » **Cathleen Ellsworth**, Managing Director, BlackRock
 - » **John Kim**, Managing Director, General Catalyst
 - » **Jim Rutherford**, Managing Director, Head of Investor Relations, Pine Brook Partners
- » **The art and science of differentiating your firm**
 - Presenters:
 - » **Graeme Faulds**, Director of Private Equity Solutions, eVestment
 - » **Rush Harvey**, Director of Investments, Texas A&M Foundation

Day 1 Agenda highlights

» Why now is a great time to be a woman on Wall Street

- Moderator:
 - » **Amy Weisman**, Managing Director, **Sterling Investment Partners**
- Panelists:
 - » **Marilyn Adler**, Managing Partner, **Mizzen Capital**
 - » **Alexandra Lebenthal**, Senior Advisor, **Empire Global Ventures**

» Fund counsel as an extension of IR

- Moderator:
 - » **Michael Hong**, Partner, **Davis Polk**
- Panelists:
 - » **Allison Cole**, Managing Director, Head of Fundraising and Investor Relations, **Lightyear Capital**
 - » **Michael Dalton**, Managing Director, **Quantum Energy Partners**
 - » **Raed Elkhatib**, President and CEO, **Atlantic-Pacific Capital**
 - » **Campbell MacColl**, Partner, **Harvest Partners**

» Fundamentals of IR training

- Presenter:
 - » **John Kim**, Managing Director, **General Catalyst**

» Fundamentals of marketing/communications training

- Moderator:
 - » **Gina Bauman**, Senior Vice President of Marketing and Investor Relations, **IVP**
- Panelists:
 - » **Mary Armstrong**, Senior Vice President, Global Head of Marketing and Communications, **General Atlantic**
 - » **Michelle Daubar**, Partner, Investor Relations & Communications, **Oak HC/FT**
 - » **Kristin Williamson**, Principal, Head of Corporate Marketing & Communications, **Hamilton Lane**

» State of the GP-led secondary market

- Moderator:
 - » **John Leone**, Partner, **Fairview Capital Group**
- Panelists:
 - » **Brett Hickey**, CEO, **Star Mountain Capital**
 - » **Archie Hunter**, Director, **Landmark Partners**
 - » **Ben Perl**, Managing Director, **Neuberger Berman**

» LPAC dos and don'ts

- Moderator:
 - » **Patricia Grad**, Senior Managing Director, Head of Investor Relations, **Arsenal Capital Partners**
- Panelists:
 - » **Tracy Harris**, Partner, Investor Relations and Product Strategy, **Siris Capital**
 - » **David Lippin**, Managing Director and Head of Investor Relations, **One Equity Partners**
 - » **Sarah Smith**, Principal, Limited Partner Services, **Advent International**

Day 1 Agenda highlights

» The evolution of ESG – meeting and exceeding the fast-evolving standard

- Moderator:
 - » **Heidi DuBois**, Head of ESG, US, Edelman
- Panelists:
 - » **Andrew Collins**, Director of ESG Investing, San Francisco Employees' Retirement System (SFERS)
 - » **Alison Humphrey**, Director, ESG, TPG Global
 - » **Elizabeth Medb Lewis**, Senior Engagement Officer, International Finance Corporation (IFC)
 - » **Dan Winters**, Head of Americas, GRESB

» Marketing/Communications: Optimizing your digital marketing and social media strategy

- Moderator:
 - » **Ken MacFadyen**, Senior Vice President, Head of Content Development, BackBay Communications
- Panelists:
 - » **Devin Banerjee**, Senior Editor, Financial Services, LinkedIn
 - » **Kathleen Richmond**, Director of Marketing, Serent Capital
 - » **Andrea Williams**, Head of Corporate Communications and Branding, Oaktree Capital



» Interactive discussions Fundraising

- Facilitators:
 - » **Kimberly Kile**, General Partner, ABS Capital Partners
 - » **Maggie Littlefield Sahlman**, Head of Investor Relations, Charlesbank Capital Partners

» LP-GP relationship building

- Facilitators:
 - » **Katie Moore**, Managing Director, Hamilton Lane
 - » **Allan Petersen**, Managing Director, Investor Relations, Nautic Partners

» Marketing & communications

- Facilitators:
 - » **Kate McGann**, Vice President, Public Relations, Hamilton Lane
 - » **Kristin Williamson**, Principal, Head of Corporate Marketing & Communications, Hamilton Lane

Day 2 Agenda highlights

» THINK TANK: Group A – Advanced/Seasoned Investor Relations (invitation only)

- Facilitators:
 - » **Allison Cole**, Managing Director, Head of Fundraising and Investor Relations, **Lightyear Capital**
 - » **Vivian Flynn**, Managing Director of Investor Relations, **Pomona Capital**

» THINK TANK: Group B – Emerging Investor Relations (invitation only)

- Facilitators:
 - » **Charles Bauer**, Partner, Head of Investor Relations, **EnCap Investments**
 - » **Caitlin Brodie**, Managing Director, **The Carlyle Group**



» THINK TANK: Group C – Marketing & Communications (invitation only)

- Facilitators:
 - » **Mary Armstrong**, Senior Vice President, Global Head of Marketing and Communications, **General Atlantic**
 - » **Kristy DeMuto**, Vice President of Strategic Marketing, **LLR Partners**

» Private equity reputation management and risk – what is your message?

- Moderator:
 - » **Mike Geller**, Partner, **Prosek Partners**
- Panelists:
 - » **Michael Elio**, Partner, **StepStone Group**
 - » **Priscilla Guevara**, Head of Investor Relations, **Science Ventures**
 - » **Emily Schillinger**, Vice President of Public Affairs, **American Investment Council**
 - » **John Thompson**, Head of Communications, **Actis**

» LP-GP dynamics: building efficient relationships in a challenging time

- Moderator:
 - » **Carolyn Chen Warner**, Director of Investor Relations, **Bruckmann, Rosser, Sherrill & Co. (BRS)**
- Panelists:
 - » **Irene Hong Edwards**, Principal, Head of Investor Relations, **Lovell Minnick Partners**
 - » **Thomas Franco**, Partner, **Clayton, Dubilier & Rice**
 - » **Roseita Monteiro**, Director, Business Development & Investor Relations, **Manulife Investment Management Private Equity & Credit**
 - » **Bijal Patel**, Director, Investor Development Group, **Actis**

Day 2 Agenda highlights

» Fundraising in 2020: dealing with the unexpected

- Moderator:
 - » **Katey Bogue**, Head of Private Markets, **eVestment**
- Panelists:
 - » **Alixé Ryan**, Director, Investor Relations, **Denham Capital**
 - » **Gary Sernovitz**, Managing Director, **Lime Rock Partners**
 - » **Andrew Tirbeni**, Vice President Fundraising, West Coast Distribution, **TPG Global**

» AGMs: dissecting approaches and challenges faced in a crisis year

- Panelists:
 - » **Keith Davisson**, Director, Global Marketing and Communications, **The Riverside Company**
 - » **Caroline Schimmelbusch**, Director, Capital Development, Europe, **Bregal Investments**
 - » **Meghan Slentz**, Head of Partner Relations and Marketing, **Pritzker Private Capital**
 - » **Joanne Yoo**, Managing Director, **Development Partners International (DPI)**

» How technology is changing IR: exceeding LP expectations when it comes to information

- Moderator:
 - » **Noreen Crowe**, Vice President, Product Management, **SS&C Intralinks**
- Panelists:
 - » **Stephanie Bednar**, Vice President, Marketing & Investor Relations, **Gryphon Investors**
 - » **Nancy Katz**, Senior Director, **Costanoa Ventures**
 - » **Christen Paras**, Director, Head of Business Development & Investor Relations, **MiddleGround Capital**

» PR and media relations: how to tie communications into your business strategy

- Moderator:
 - » **Renee Calabro**, Executive Vice President, Head of Capital Markets Communications, **Edelman**
- Panelists:
 - » **Christine Anderson**, Senior Managing Director, Global Head of Public Affairs & Marketing, **Blackstone**
 - » **Kerrie Cohen**, Head of Communications, Americas, **Warburg Pincus**
 - » **Ari Levine**, Communications Director, **Unigrains**
 - » **Alexander Samuelson**, Global Head of Media Relations, **Neuberger Berman**



Day 2 Agenda highlights

» Building IR programs – talent recruitment, management, and development

- Moderator:
 - » **Ryan Lavin**, Vice President, Investor Relations, **The Carlyle Group**
- Panelists:
 - » **Michael Bane**, Head of US Investor Relations, **Ardian**
 - » **Ryan Green**, Director, Business Development, **Abbott Capital**
 - » **Jennifer James**, Managing Director, Investor Relations & Marketing, **Thoma Bravo**



» IR reaching new frontiers in delivering internal value

- Moderator:
 - » **Karen Bommart**, Head of Investor Relations, **Battery Ventures**
- Panelists:
 - » **Lindsay Grider**, Head of Investor Relations, **Tailwater Capital**
 - » **Daniel Lee**, Head of Fundraising & Investor Relations, **17Capital**
 - » **Mary Manin**, Principal, Co-Head of Marketing and Investor Relations, **Stone Point Capital**
 - » **Emily Melchior**, Managing Director, Head of Investor Relations & Chief of Staff, **Searchlight Capital Partners**



“This is the only event for connecting with marketing peers in the private equity industry and I’ve made excellent, year-round contacts from it.”

Kristy DelMuto
LLR Partners

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✉️ regny@peimedia.com

☎️ +1 212 633 1073

