

Investor Relations, Marketing & Communications Forum

New York 2023

Agenda

Day 1 - Wednesday, April 19

8:00 AM - 9:00 AM Pre-conference breakfast meetings

Get geared up for the conference at one of our concurrent breakfast meetings.

A. Brand authenticity in private markets

- What does “authenticity” mean in the private market?
- How do you create KPIs for authenticity?
- Share ideas for creating and managing an authentic brand and narrative for fund managers.

Speakers:

Mary Armstrong, Managing Director, Global Head of Marketing & Communications, **General Atlantic**

Priscilla Guevara, Head of Investor Relations, Investment Team & Science Ventures, **Science Inc.**

Rob Kaufman, Principal, Head of Investor Relations, **Linse Capital**

Ravali Parsa, Director of Investor Relations, **Aurora Capital Partners**

B. Fundraising during a downturn

- How will a recession impact the global fundraising market?
- How do you retain investors in a recession?
- Discuss emerging fundraising strategies to connect with non-traditional sources of capital.

Speakers:

Amy Nelson, Chief Strategy Officer, **Rethink Capital Partners**

Michelle Noyes, Managing Director, Head of Americas, **Alternative Investment Management Association (AIMA)**

Bill O'Connor, Managing Director, **PEI**

Tony Paredes, Vice President of Sales, **Anduin**

Sarah Tomolonius, Vice President, Investor Relations, **M13**

C. VIP breakfast: A modern IR approach to converting your IR funnel faster (Invite-only)

9:00 AM - 9:15 AM Opening remarks

Speaker: **Seth Kerker**, Director, Membership & Events, **PEI**

9:15 AM - 9:50 AM Fireside keynote: Future-proof marketing for private markets

- What is future-proof marketing?
- How will social media change the private investment market?
- Get ideas on how to optimize your firm's marketing team, technology, and strategy.

Interviewee: **Arielle Gross Samuels**, Managing Director, Global Head of Marketing, **Blackstone**

Interviewer: **MK Flynn**, Editor-in-Chief, **PE Hub**

9:50 AM - 10:20 AM Networking break

10:20 AM - 10:55 AM The impact of the recession on private markets

- How will the recession affect the allocation strategies of traditional investors?
- What are the global events and economic trends driving investor behavior today and tomorrow?
- Understand what investors want to see in GP proposals in the current economic environment.

Moderator: **Sarah Smith**, Managing Director, Limited Partner Services, **Advent International**

Speakers:

Abigail Archibald, Senior Portfolio Manager, **Mellon Foundation**

Stephan Connelly, Managing Director, **Star Mountain Capital**

Robert Ellis, Managing Director, **Summit Rock Advisors**

Neda Jafar, Partner, **Kimmeridge**

10:55 AM - 11:25 AM Refreshment break

11:25 AM - 12:05 PM Masterclasses

Masterclasses provide delegates with practical insight and guidance from leading voices and expert sources on a variety of subjects. Set up in a classroom style, delegates will come away with actionable advice and insights on how to tackle complex challenges.

Masterclass A: How to build marketing teams for private markets

- How to assess the marketing needs of your firm and get buy-in from management.
- How to create a vision for your marketing team.
- Learn strategies small-to-midsize firms can use to build lean marketing teams.

Speakers:

Jeffrey Auerbach, Director of Marketing, **MiddleGround Capital**

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

Aarti Iyer, Head of Communications, **Campbell Lutyens**

Yokasta Segura-Baez, Managing Director, Investor Relations & Fundraising, **ArcLight Capital Partners**

Masterclass B: Branding and content creation for fund managers

- Aligning your firm's branding and investment strategies.
- Creating and cultivating brand narratives that drive investor diversification and loyalty.
- Learning what the private equity sector can learn from venture capital when it comes to telling a firm's story.

Speakers:

Kelsey Clute, Vice President, Director of Communications, **HCI Equity Partners**

Jack Cohen, Vice President of Content & Engagement, **General Catalyst**

Kristy DelMuto, Senior Director, Strategic Marketing, **LLR Partners**

Kimberley Tait, Vice President, Global Head of Content & Brand, **Antler**

Masterclass C: Designing your IR, marketing & communications tech stack

- Building your firm's fundraising, marketing & communications tech stack on a budget.
- Designing your firm's digital strategy that grows your investor relations, fundraising, marketing & communications efforts.
- Understanding the technologies your firm's IR and marcomms "team of one" needs to adapt to changing investor priorities in a challenging global economy.

Speakers:

Angela Johnson, Partner, Investor Relations & Capital Raising, **Fifth Wall**

Joel Palathinkal, CEO, **Sutton Capital**

David Teten, Managing Partner, **Versatile Venture Capital**

Louise Verga, Managing Director Americas, **Dasseti**

Masterclass D: The private market regulatory environment

- What does the regulatory environment for private markets look like today?
- How does the current regulatory environment impact your firm's fundraising and marketing strategies?
- Learn how to successfully navigate the new SEC marketing rule and other regulations.

Speakers:

Blake Bennett, Chief Financial Officer & Chief Compliance Officer, **Revelstoke Capital**

Miles Chan, Vice President of Insight, **Ontra**

Michael Hong, Partner, Investment Management, **Davis Polk**

Suzan Rose, Senior Advisor, Government & Regulatory Affairs, **Alternative Investment Management Association (AIMA)**

12:05 PM - 1:05 PM Lunch

1:05 PM - 1:40 PM Generation Z and the private market

- What drives the behavior of Gen Z investors and managers?
- How is Gen Z influencing the alternative investment market?

- Learn what Gen Z investors expect from managers when it comes to fundraising, relations, and marketing.

Speaker: Meagan Loyst, Founder & CEO, **Gen Z VCs**

1:40 PM - 2:10 PM Networking break

2:10 PM - 2:45 PM Is DEI falling behind?

- In 2020, LPs dramatically increased their DEI commitments; how do LPs prioritize diverse-owned managers in their allocation strategies today?
- Learn how fund managers can build equity into their investment strategies.
- How can DEI investment strategies include other underserved groups such as the neurodivergent population?

Moderator: Carmen Ortiz McGhee, Chief Operating Officer, **National Association of Investment Companies**

Speakers:

Michael Elio, Partner, **StepStone Group**

Amy Nelson, Chief Strategy Officer, **Rethink Capital Partners**

Josette Thompson, Managing Director, **Prosek Partners**

2:45 PM - 3:00 PM Refreshment break

3:00 PM - 4:00 PM Working groups

Join one of our working groups to collaborate with your peers around shared challenges and take part in wide-ranging conversations about emerging trends.

Working group A: Digital transformations for marketing & fundraising in private markets

- What does a digital transformation look like for private equity fund managers?
- I have years of data – how do I determine what data will be most useful during my digital transformation?
- Learn about the digital tools available to optimize your marketing and fundraising efforts.

Moderator: Hye Kyung (HK) Lee, Chief Solutions Officer, **InvestorFlow**

Speakers:

Erica Blob, Partner, Chief Operating Officer & Chief Compliance Officer, **Brighton Park Capital**

Annie Caucci, Director of Marketing, **NewSpring Capital**

Isabel Han, Associate Director, Product Management, **Invesco**

Rachel Hannon, Principal, Business Development and Investor Relations, **Summit Park**

Brian Jackson, Data Scientist, **Kimmeridge**

Matt Richards, Head of Market Intelligence, **Angelo Gordon**

Working group B: Getting real about ESG

- How do investors prioritize ESG during a recession?

PEI To learn more, visit: peievents.com/en/event/irmc-forum-ny/

- How do you communicate your firm's ESG strategy to non-traditional investors?
- Share insights on tailoring and communicating your ESG strategy to match your firm's investment approach in a slowed economy.

Moderator: **Frazer Blyth**, Director, Marketing & Communications, **Bluewater**

Speakers:

Heidi Dubois, Global Head of ESG, **AEA Investors**

Leslie Golden, Managing Director, Global Head of Capital Formation & Investor Relations, **DigitalBridge**

Justin Kulla, Partner, **TZP Group**

Natalya Michaels, Managing Director, Head of Investor Relations, **Paine Schwartz Partners**

Ravali Parsa, Director of Investor Relations, **Aurora Capital Partners**

Gary Sernovitz, Managing Director, **Lime Rock Partners**

Rachele Stephenson, Manager of Investor Relations, **NewSpring Capital**

Sarah Tomolonius, Vice President of Investor Relations, **M13**

Working group C: Social media's role in private market fundraising

- What is driving fundraisers to social media for prospects, and what success are they finding?
- How are investors using social media to find new managers, and how are managers using social media to find new founders and deals?
- Share ideas and learn strategies for using social media as a viable source of investors and deals.

Moderator: **Devin Banerjee**, Managing Editor, **LinkedIn**

Speakers:

Ellen Chan, Global Director of Digital Marketing, **Antler**

Lindsay DeLarme, Managing Director, Head of Corporate Communications & Branding, **Oaktree Capital Management**

Mike Duda, Managing Partner, **Bullish Inc.**

Emily Melchior, Head of Investor Relations, **Bansk Group**

Courtney Mullin, Senior Manager, Investor Relations & Community, **Tidemark**

Michele Puopolo, Vice President, Private Investing Marketing Strategist, **Wellington Management**

Courtney Sullivan, Managing Director and Head of Fundraising and Investor Relations, **Lightyear Capital**

Iris Tomczyk, Head of Marketing & Communications, **Edison Partners**

Working group D: The investor experience

- Why is understanding your firm's investor experience so critical for attracting investor prospects and retaining investor partners?
- How can fund managers use marketing funnels to identify and even qualify investors?
- Share ideas about how to shape an investor's entire journey with your firm: from marketing, content, and social media, to hybrid, virtual, and in-person AGMs.

Moderator: **Matt Malone**, CEO, **Privcap**

Speakers:

Sheila Dharmarajan, Partner, Head of Investor Relations & Business Development, **ZMC**

Melissa Greenberg, Head of Investor Relations, **North Peak Capital**

Priscilla Guevara, Head of Investor Relations, Investment Team & Science Ventures, **Science Inc.**

Amrita Mainthia, Vice President, Investor Relations, **General Catalyst**

Alia Rafi, Principal, Investor Relations & Fundraising, **FTV Capital**

Jennifer Zhu, Principal, Investor Relations, **Incline Equity Partners**

4:00 PM - 4:30 PM Networking break

4:30 PM - 5:00 PM Workshops I

- Share best practices, tips & tricks.
- Connect and collaborate with your peers around shared challenges.
- Take part in a lively moderated discussion.

Workshop A: Pitch deck optimization

- How are GPs using the pitchbook today?
- Should you still use pitchbooks in meetings?
- Learn tactics and strategies available to enhance the effectiveness of your pitchbook.

Speakers:

Carolyn Chen Warner, Director of Investor Relations, **BRS & Co.**

Johanna Doherty, Managing Director, Investor Relations & Marketing, **JLL**

Jon Greene, Managing Director, **MJ Hudson**

Workshop B: Streamlining investor onboarding & adding transparency to your capital raising process

- How can your firm reduce risk around data collection and transaction management?
- How can my firm improve the investor onboarding experience?
- Learn to reduce the cycle time to receive funding.

Speaker:

Noreen Crowe, Vice President of Product Development, **SS&C Intralinks**

Brian Finnegan, Senior Business Information Manager, **American Securities**

Workshop C: Getting creative with your DDQ

- How do you refresh your firm's approach to crafting winning DDQs?
- What are some ways to add depth to your DDQ?
- Learn how to balance creativity with regulatory compliance

Speakers:

Natasha Azar, Vice President, Investor Relations & Marketing, University Relations, **Osage University Partners**

Sarah Busch, Principal, Investor Relations, **Argosy Capital**
Dan Sullivan, Sales Executive for the Americas, **DiligenceVault**

Workshop D: Marketing to organizations versus individuals

- Can the personal brands of my leadership team materially enhance my organization's brand?
- How can fund managers make mass communications seem personal?
- Learn techniques to leverage individual connections when marketing to organizations.

Speakers:

Emila Damjanovic, Partner, Investor Relations, **Lead Edge Capital**
Rob Kaufman, Principal, Head of Investor Relations, **Linse Capital**
Kimberly Lu, Vice President, Investor Relations, **Vestar Capital Partners**

5:00 PM - 6:30 PM Reception

Day 2 - Thursday, April 20

8:00 AM - 9:00 AM Think tanks

Our think tanks are invitation-only gatherings for individual stakeholder groups. Kick off the conference's second day with discussions on critical issues and share learnings with peers in a closed-door setting, with no media, vendors, or service providers in the room.

Think tank for investor relations & fundraising professionals

- How are investor relations & fundraising professionals coping with such a competitive funding market, rising inflation, and the impacts of other global crises?

Speakers:

Jeff Becker, General Partner, **Antler**
William Craig, Investment Director, **Wellington Management**
Morgan Schmit-Sobeck, Principal, Investor Relations, **Clayton, Dubilier & Rice**
Robyn Slutzky, Partner, Head of Capital Solutions, **Arctos Partners**

Think tank for marketing & communications professionals

- How can marketing, branding, and communications professionals continue to add value in the private capital market?

Speakers:

Kelsey Clute, Vice President, Director of Communications, **HCI Equity Partners**
Pia De Sousa, Director of Marketing, **Sun Capital Partners**

9:00 AM - 9:15 AM Chair's welcome

9:15 AM - 9:50 AM Fireside keynote: Where is your firm on the branding spectrum?

- How do privately held alternative investment firms tell authentic, honest brand stories?
- Is my firm a leader or just keeping up with the Joneses when it comes to DEI, ESG, and impact investing?
- Learn how to adapt your branding and marketing strategy for new sources of capital, (e.g., retail/mass affluent investors, international investors).

Interviewee: **Jennifer Zimmerman**, Chief Marketing Officer, **General Catalyst**

Interviewer: **Caroline Gibson**, Partner, **Prosek Partners**

9:50 AM - 10:20 AM Networking coffee break

10:20 AM - 10:55 AM Growing your fundraising footprint

- What are the top alternative sources of capital today?
- Fundraising overseas - what are the challenges and solutions?
- Learn how to work with placement agents and get the most out of the relationship.

Moderator: **Sherri Williams**, Partner, Head of Investor Relations & Fundraising, **The Raine Group**

Speakers:

Elliot Pasztor, Vice President, Origination, **Further Capital**

Jessica Schmitt, Head of Investor Relations, **Arrowroot Capital**

Jacob Shulman, Director of Investor Relations, **Oak Hill Capital**

Frederick Storz, Managing Director, Investor Relations, **Energy Capital Partners**

10:55 AM - 11:10 AM Networking coffee break

11:10 AM - 11:45 AM Crisis communications

- How have the various crises of the last two years (e.g., the war in Ukraine, rising interest rates, the denominator effect, the cryptocurrency crisis) impacted private market fundraising?
- How can investment managers create proactive crisis communications strategies?
- Get best practices on how to retain investors through crises.

Moderator: **Colin Allodi**, Senior Vice President, Institutional Sales, **Backstop Solutions Group**

Speakers:

Jimmy Carrion, Senior Vice President of Investor Relations, **Lloyd Jones**

Alexander Samuelson, Managing Director, Global Head of Media Relations, **Neuberger Berman**

Evan Teiger, Partner, Investor Relations, **Foundation Capital**

11:45 AM - 12:00 PM Networking break

12:00 PM - 12:30 PM Workshops II

Share best practices, tips, and tricks to collaborate with your peers on shared challenges, and participate in a lively, moderated discussion. Be prepared to learn and contribute to the conversation.

Workshop A: Setting an approach to media relations

- Can a good press relations strategy be an asset to support growth as well as manage the firm's reputation?
- What are the best practices for handling press relations challenges?
- Learn about building and promoting your brand through press relations.

Speakers:

Brittany Cash, Principal, Co-Head of Corporate Communications, **Ares Management**

Kate McGann, Principal, Corporate Marketing & Communications, **Hamilton Lane**

Workshop B: What do LPs want?

- How have institutional investor priorities changed in the face of the worst fundraising environment since 2008?
- What can you do to retain investors in a highly competitive, cash-constrained market?
- Gain insight into how you can find new fundraising opportunities even when most LPs are already over-allocated.

Speakers:

Jay Brupbacher, Head of US Investor Relations, **Astorg**

Robyn Slutzky, Partner, Head of Capital Solutions, **Arctos Partners**

Jeff Williams, Chief Strategy Officer, **Altvia**

Workshop C: How to use marketing to close deals

- What can firms do to attract the right kind of founders for your portfolio?
- Can marketing techniques help managers qualify founders as well as attract them?
- Learn what motivates founders today and how to increase your firm's deal flow.

Speakers:

Kristy DelMuto, Senior Director, Strategic Marketing, **LLR Partners**

Ryan Parker, Chief Marketing Officer & Head of Brand, **Trivest**

Workshop D: International fundraising

- What is driving interest in international capital markets?
- Learn how to tailor your proposal to comply with local regulations and customs.
- What are the challenges and pitfalls of international fundraising?

Speaker:

Elizabeth Lawrence, Director, Investor Relationships, **American Securities**

Susan Stella, Head of Investor Relations and Impact, **Activate Capital**

12:30 PM - 1:30 PM Lunch & close of the conference