

Investor Relations, Marketing & Communications Forum New York 2023

April 19-20
Convene, 117 W 46th St, New York

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 alternative investments

- What does "authenticity" mean in the alternative investments market?
- Discuss how to create and manage an authentic brand and narrative for fund managers.
- How do you create KPIs for authenticity?

B. Investor relations, marketing & communications for emerging funds

- How are emerging managers impacting the private equity market?
- Share ideas and best practices for emerging funds in the private equity market.
- How do you tell your own "emerging manager story" for fundraising and marketing?

9:00 AM - 9:15 AM Opening remarks & chair's welcome

9:15 AM - 10:00 AM Fireside keynote chat: Future-proofing marketing in alternative investments

- Why does the alternative investments management industry need to future-proof marketing?
- Identify the in-house marketing expertise and technology you need to create an impactful, consistent, and authentic brand, and how to build your team.
- Is the alternative investment market going social?

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

10:00 AM - 10:30 AM Networking break

10:30 AM - 11:05 AM LP panel: Trends and allocation strategies for private equity

- What are the new allocation strategies emerging today?
- Understand the global events and economic trends driving LP behavior.
- How can you use these insights to drive investor relations, marketing & communication strategy for your firm?

11:05 AM - 11:20 AM Refreshment break

11:20 AM - 12:00 PM Masterclasses

Attend one of four concurrent masterclasses to get practical insight and guidance from leading voices and expert sources on a variety of subjects, including:

- A. *How to build your investor relations, marketing & communications team*
- B. *Content production for fund managers*
- C. *How to design your investor relations, marketing & communications tech stack*
- D. *How to plan your next AGM*

12:00 PM - 1:00 PM Lunch

1:00 PM - 1:25 PM Generation Z and the alternative investments market

- What drives Gen Z investors and managers behavior?
- 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**

1:25 PM - 2:40 PM Working groups A & B

Guided by experts and thought leaders, our concurrent working group sessions combine panels with roundtable discussions to spark peer-to-peer engagement around big picture challenges.

- A. *Digital transformations for investor relations, marketing & communications*
- B. *DEI: How are LPs prioritizing DEI today?*

2:40 PM - 2:55 PM Refreshment break

2:55 PM - 3:30 PM Getting real about ESG

- What can investor relations do to avoid greenwashing?
- Learn how to right size your ESG efforts to fit your firm's strategy
- How are LPs prioritizing ESG today?

3:30 PM - 3:45 PM Refreshment break

3:45 PM - 5:00 PM Working groups C & D

Guided by experts and thought leaders, our concurrent working group sessions combine panels with roundtable discussions to spark peer-to-peer engagement around big picture challenges.

- C. *Social media's role in private equity fundraising & investor relations*
- D. *Designing the stakeholder journey for your fund*

5:00 PM - 7:00 PM Reception

Day 2 - Thursday, April 20

8:00 AM - 9:15 AM Think tanks

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

- A. *Investor relations & fundraising*
- B. *Marketing & communications*
- C. *Allocators*

9:15 AM - 9:25 AM Chair's welcome

9:25 AM - 10:05 AM Day 2 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 fine-tune your investor relations, marketing & communications strategies to become a leader and not a follower

10:05 AM - 10:15 AM Refreshment break

10:15 AM - 11:00 AM Workshops I

Take part in one of five workshops around specific challenges in investor relations, marketing & communications.

- A. *Digital storytelling for private equity firms*
- B. *How to use LinkedIn for private equity fundraising*
- C. *Leveraging technology at your next AGM*
- D. *Best practices for managing DDQ reporting*
- E. *Refreshing your branding narrative*

11:00 AM - 11:35 AM Coffeehouse chats

Take part in informal, but expert-led, coffeehouse chats around relevant topics. Move from one chat to another based on your interest, network, and of course, take a coffee break! Chats will cover:

- A. *Alternative investment consumerization*
- B. *The end of the "megadeal era" and the impact on your investor relations, marketing & communications strategies*
- C. *Stakeholder journeys in private equity*

11:35 AM - 11:45 AM Refreshment break





11:45 AM - 12:30 PM Workshops II

- A. *Best practices for crisis communications*
- B. *Press relations - friend or foe?*
- C. *Top tips for the perfect DDQ*
- D. *Key terms to know for LPAs*
- E. *How to use marketing to close deals*

12:30 PM - 1:30 PM Closing lunch