Tuesday, April 19

8:00–8:50am Pre-conference workshops

WORKSHOP A: Redefining company culture

8:55am Welcome

WORKSHOP B: Recruiting and retaining talent: Maneuvering the great resignation

9:00am Opening remarks

9:05am Today’s IR: How the past two years have redefined the role

• Pivoting during continued uncertainty in a heated market
• Fundraising changes, challenges, and solutions
• The future of LP communications
• Responding to the demand of stakeholders
• Unexpected challenges
• How companies are reassessing their needs and how it is impacting PE firms

Moderator: Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub
Shavonne Correia, Head of Investor Relations & Marketing, KPS Capital Partners
Jennifer James, Managing Director, Chief Operating Officer, and Head of Investor Relations & Marketing, Thoma Bravo
Nathan Urquhart, Partner and Global Head of Investor Relations, Carlyle

9:45am Shaping your ESG message

• Investor demands and expectations
• Incorporating ESG into your narrative
• Harnessing and conveying the evolution of social issues
• ESG war stories
• Strategies to avoid greenwashing
• Addressing and honoring the needs of stakeholders

Moderator: Jordan Stutts, Senior Reporter, New Private Market
Christine Anderson, Global Head of External Relations, Blackstone
Debby Cordeiro, Vice President, Public Affairs and Communications, Ivanhoe Cambridge
Heidi Dubois, Global Head of ESG, AEA Investors
John Thompson, Global Communications Director, Actis
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<tr>
<td>10:15am</td>
<td>Networking break</td>
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<tr>
<td>10:45am</td>
<td>Breakouts</td>
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<td><strong>INVESTOR RELATIONS:</strong></td>
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| Diversifying your investor base | - New strategies for finding foreign and domestic investors  
- Adaptive methods to keep investors engaged  
- Techniques to earn trust and loyalty when working with new LPs  
- Positioning innovative investment strategies  
- Working with placement agents |
| Franny Jones, Managing Director, The Sterling Group |                              |
| **MARKETING & COMMUNICATIONS:** |                              |
| Crisis communication: Navigating the endemic and beyond | - Harnessing new modes of communication due to COVID  
- How communication strategies have adapted and changed going into COVID’s third year  
- Managing the different needs of stakeholders  
- Tailoring your message and targeting your audience  
- Communicating your firm’s message internally  
- Utilizing digital and experiential marketing |
| Moderator: Clare Burrows, Corporate Communications & Branding, Oaktree |                              |
| Mary Armstrong, Managing Director, General Atlantic |                              |
| Mike Geller, Partner, Prosek |                              |
| Kelly Howard, Partner, Head of Marketing, Adams Street Partners |                              |
| **11:30am Breakouts** |                              |
| **INVESTOR RELATIONS:** |                              |
| IR when you’re not actively fundraising: Building a foundation | - Preparing to market your fund and convey your strategy to LPs  
- Compiling and tailoring your investor list due to changing LP demands  
- Conducting thorough due diligence  
- New approaches to differentiate your firm and fund to investors  
- Creative solutions to planning and executing a road show  
- Creating the perfect pitch in a COVID world |
| Moderator: Ryan FitzGibbon, Managing Director, Prosek Partners |                              |
| Michelle Daubar, Partner, Investor Relations & Communications, Oak HC/FT |                              |
| Irene Hong Edwards, Principal, Head of Investor Relations, Lovell Minnick Partners |                              |
| Kim Kile, Head of Investor Relations, Marketing & Communications, Access Holdings |                              |
| Stacey Monteiro Leanos, Director of Investor Relations, ACME |                              |
| **MARKETING & COMMUNICATIONS:** |                              |
| Communication strategies to develop and protect your relationships | - Understanding investor expectations: How to stay relevant  
- Investor appetite and allocation in 2022 and beyond  
- Communication dos and don’ts  
- Messaging fundamentals  
- Working with global investors  
- Utilizing technology to enhance communication  
- How tech and data can evaluate and monitor your LP relationships |
| Michelle Holleman, Director of Communications, Chicago Teachers’ Pension Fund |                              |
| Kristin Williamson, Head of Corporate Marketing and Communications, Hamilton Lane |                              |
| **12:15pm Networking luncheon** |                              |
| **1:10 pm Coffee house chats: Deep dives with the speakers** |                              |
| STRENGTHEN LP LOYALTY AND GENERATE MORE FIRST-TIME ALLOCATIONS |                              |
| Kyle Dunn, Managing Director, Business Development - IR & Marketing, MJ Hudson |                              |
| Jon Greene, Managing Director, Europe - IR & Marketing, MJ Hudson |                              |
| OPTIMIZING ONLINE COMMUNICATION |                              |
| PROVIDING CONSISTENT MESSAGING TO THE BOARD AND YOUR INVESTORS |                              |

Learn more at: peievents.com/en/event/investor-relations-marketing-communications-forum-new-york-2022/
2:00pm  The new AGM: Organizing and executing a return to in-person

- Preparing for your annual meeting
- Addressing LP expectations to make it to the next tier
- Investor engagement and interactive solutions
- Infrastructure issues and technology tips
- Is a virtual/live hybrid model sustainable?
- Taking your AGM to the next level

Gretchen Robinson, Director, Capital Formation-Business Development, GI Partners

2:40pm  LP insight: Building and sustaining credibility with investors

- Utilizing metrics to quantify and report on LP interaction/relations
- Key strategies in reputational management & reputational risk
- Best practices in conveying company culture and value
- Effective communications and marketing for investors, regulators, and key stakeholders
- Fundraising: Navigating the busiest market in the industry
- Understanding and choosing resources to improve your firm’s trajectory

Moderator: Jason Jerista, Managing Director, Investor Relations, LLR Partners

Melissa Greenberg, Head of Investor Relations, North Peak Capital
Amy Harsch, Managing Director, Investor Relationships, American Securities

3:20pm  Networking break

3:50pm  Deep dive roundtables

1. EVERYTHING YOU NEED TO KNOW ABOUT GP-LED SECONDARIES
2. PRESS RELATIONS: KEYS TO SUCCESSFUL COMMUNICATION
   Ari Levine, Director of Communications and Investor Relations, Unigrains
3. TECHNOLOGY SOLUTIONS TO IMPROVE LP COMMUNICATION, STREAMLINE REPORTING & ENHANCE TRANSPARENCY
4. REFRESHING YOUR BRAND AND NARRATIVE
   Kristy DelMuto, Senior Director, Strategic Marketing, LLR
   John Thompson, Global Communications Director, Actis
5. STRATEGIES FOR EMERGING MANAGERS: APPROACHES TO DRIVE VALUE CREATION
   Colleen McKenzie, VP, Investor Relations, Butterfly
   Candice Sorbera, Managing Director, Head of Investor Relations, Butterfly
6. ADAPTING TO DIGITAL DISRUPTION

4:55pm  Close of day 1: Cocktails and networking

Learn more at: peievents.com/en/event/investor-relations-marketing-communications-forum-new-york-2022/
Wednesday, April 20

6:15 am   3K Fun Run in Central Park
6:15 am   Yoga in Bryant Park

8:00–9:00am   Pre-conference think tanks

ADVANCED IR: Best practices from industry leaders
Franny Jones, Managing Director, The Sterling Group
Maggie Littlefield Sahlman, Managing Director and Head of Investor Relations, Charlesbank
Kenya Williams, Managing Director and Product Specialist, Oaktree

EMERGING IR: Building and advancing your career

MARKETING & COMMUNICATIONS: Strategies for success

9:00am   Welcome remarks

9:05am   Elevating your DE&I initiative: How to raise the bar
• Preparing for your annual meeting
• Addressing LP expectations to make it to the next tier
• Investor engagement and interactive solutions
• Infrastructure issues and technology tips
• Is a virtual/live hybrid model sustainable?
• Taking your AGM to the next level
Kristin DePlatchett, Partner and Head of Investor Relations, Trilantic Capital Management
Sharmila Kassam, Chief Operating Officer, Nasdaq Asset Owner Solutions
Megan Lundy, Managing Director, Audax Private Equity

9:45am   Fundraising amid the endemic and a heated market
• Readyng investors for you to come to market
• Adapting to current environments and pivoting your fundraising strategy
• Online fundraising tips and tricks
• Differentiating your firm when fundraising
• Forecasting challenges in 2022 and beyond
• Managing the process and broadening your skill set
Charles Bauer, Partner, EnCap Investments
Eliot Hodges, Chief Executive Officer, Anduin
Maggie Littlefield Sahlman, Managing Director and Head of Investor Relations, Charlesbank
Alexis Maskell, Partner, Head of Investor Relations, BC Partners

10:40am   Networking break

Learn more at:
peievents.com/en/event/investor-relations-marketing-communications-forum-new-york-2022/
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<tr>
<td>11:00am</td>
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<tr>
<td>1. THE ANNUAL INVESTOR CONFERENCE: POWERFUL WAYS TO ENGAGE AND UPDATE WITH YOUR INVESTORS</td>
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| Steve Felix, Founder, Felix Consulting 
Liz Weiner, Co-Founder, Felix Consulting |
| 2. OPTIMIZING YOUR DIGITAL STRATEGY: WHAT YOU'RE MISSING |
| 3. IR AND MARKETING IN VENTURE CAPITAL  |
| Stacey Monteiro Leanos, Director of Investor Relations, ACME 
Sarah Tomolonius, VP, Investor Relations, M13 |
| 4. LPAC DOS AND DON'TS  |
| Jason Jerista, Managing Director, Investor Relations, LLR Partners 
Jeff Mills, Partner, Global Head of Investor Relations, RCF |
| 5. THE EVOLUTION OF CO-INVESTMENT PROCESSES: ARE THEY HERE TO STAY? |
| 12:15pm      | Closing networking luncheon                                                    |