

Investor Relations, Marketing & Communications Forum New York 2022

April 19-20, 2022
Convene, 117 W 46th St, New York

Tuesday, April 19

8:00-8:50am Pre-conference workshops

WORKSHOP A:

Redefining company culture

8:55am Welcome

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**

WORKSHOP B:

Recruiting and retaining talent: Maneuvering the great resignation

10:15am Networking break

10:45am Breakouts

INVESTOR RELATIONS:

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



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

4. REFRESHING YOUR BRAND AND NARRATIVE

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

John Thompson, Global Communications Director, **Actis**

2. PRESS RELATIONS: KEYS TO SUCCESSFUL COMMUNICATION

Ari Levine, Director of Communications and Investor Relations, **Unigrains**

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**

3. TECHNOLOGY SOLUTIONS TO IMPROVE LP COMMUNICATION, STREAMLINE REPORTING & ENHANCE TRANSPARENCY

6. ADAPTING TO DIGITAL DISRUPTION

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

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

- Ready 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



11:00am Masterclass roundtables

1. THE ANNUAL INVESTOR CONFERENCE: POWERFUL WAYS TO ENGAGE AND UPDATE WITH YOUR INVESTORS

Steve Felix, Founder, **Felix Consulting**
Liz Weiner, Co-Founder, **Felix Consulting**

2. OPTIMIZING YOUR DIGITAL STRATEGY: WHAT YOU'RE MISSING

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?

3. IR AND MARKETING IN VENTURE CAPITAL

Stacey Monteiro Leanos, Director of
Investor Relations, **ACME**

Sarah Tomolonius, VP, Investor Relations,
M13

12:15pm Closing networking luncheon