

Private Equity  
International

# Investor Relations, Marketing & Communications Forum

New York 2022

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

## Harnessing industry changes, trends, and new opportunities

**PEI**

To learn more, visit:

[peievents.com/en/event/investor-relations-marketing-communications-forum-new-york-2022/](https://peievents.com/en/event/investor-relations-marketing-communications-forum-new-york-2022/)

# Contents

---

- » [Agenda highlights](#) →
- » [Advisory board](#) →
- » [Speakers](#) →
- » [Networking opportunities](#) →
- » [Attendees](#) →
- » [Venue and hotel](#) →
- » [Event sponsors](#) →
- » [Event tickets](#) →



*The forum is two days full of applicable content that is very hard to find elsewhere.*

**Kelsey Clute**

HCI Equity Partners

# Agenda highlights

[View full agenda ↗](#)



**IR when you're not actively fundraising:**  
Building a foundation



**ESG:**  
Shaping your message



**Communication strategies:**  
Develop and protect your relationships



**Crisis communication:**  
Navigating the endemic and beyond



**Fundraising:**  
Implementing strategies amid the endemic and a heated market



**Optimizing your digital strategy:**  
What you're missing



**Technology solutions:**  
Improve LP communication and streamline reporting



**Think tanks:**  
Global marketing and communication strategies for success

# Advisory board

[View all speakers ↗](#)



**Christine Anderson**  
Global Head of External  
Relations  
Blackstone



**Mary Kate Bertke**  
Managing Director,  
Head of Investor Relations  
Great Hill Partners



**Alanna Chaffin**  
Co-Head, Investor  
Relations &  
Communications  
OpenGate Capital



**Conrad Gorospe**  
Head of North America  
Fundraising & Investor  
Relations  
Insight Partners



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



**Gina Lee Peyton**  
Partner, Head of Capital  
Formation  
Castlelake



**Maggie Littlefield  
Sahlman**  
Managing Director and  
Head of Investor Relations  
Charlesbank



**Laura Manley**  
Chief Marketing Officer  
MetLife Investment  
Management



**John Thompson**  
Global Communications  
Director  
Actis

# Featured speakers

[View speakers ↻](#)



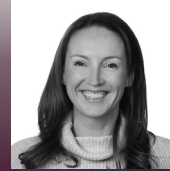
**Christine Anderson**  
Global Head of External  
Relations  
**Blackstone**



**Mary Armstrong**  
Managing Director  
**General Atlantic**



**Charles Bauer**  
Partner  
**EnCap Investments**



**Mary Kate Bertke**  
Managing Director,  
Head of Investor  
Relations  
**Great Hill Partners**



**Clare Burrows**  
Corporate  
Communications &  
Branding  
**Oaktree**



**Alanna Chaffin**  
Co-Head, Investor  
Relations &  
Communications  
**OpenGate Capital**



**Debby Cordeiro**  
Vice President,  
Public Affairs and  
Communications  
**Ivanhoé Cambridge**



**Shavonne Correia**  
Head of Investor  
Relations & Marketing  
**KPS Capital Partners**



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



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

# Featured speakers

[View speakers](#) ↻



**Kristin DePlatchett**  
Partner, Head of  
Investor Relations  
Trilantic North America



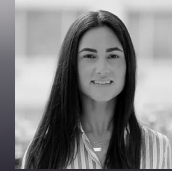
**Heidi DuBois**  
Global Head of ESG  
AEA Investors



**Katie Fasken**  
Managing Director  
Slate Asset  
Management



**Steve Felix**  
Partner & Co-Founder  
Felix / Weiner  
Consulting Group



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



**Amy Harsch**  
Managing Director  
American Securities



**Michelle Holleman**  
Director of  
Communications  
Chicago Teachers'  
Pension Fund



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



**Kelly Howard**  
Partner, Head of  
Marketing  
Adams Street Partners



**Michelle Jacobi**  
Managing Director  
Gatewood



# Featured speakers

[View speakers](#) ↻



**Jennifer James**  
Managing Director,  
COO, and Head of  
Investor Relations &  
Marketing  
**Thoma Bravo**



**Jason Jerista**  
Managing Director,  
Investor Relations  
**LLR Partners**



**Franny Jones**  
Managing Director  
**The Sterling Group**



**Kim Kile**  
Head of Investor  
Relations, Fundraising,  
and Communications  
**Access Holdings**



**Gina Lee Peyton**  
Partner, Head of  
Capital Formation  
**Castlelake**



**Ari Levine**  
Director of  
Communications &  
Investor Relations  
**Unigrains**



**Maggie Littlefield  
Sahlman**  
Managing Director and  
Head of Investor Relations  
**Charlesbank**



**Megan Lundy**  
Managing Director  
**Audax Private Equity**



**Laura Manley**  
Chief Marketing Officer  
**MetLife Investment  
Management**



**Alexis Maskell**  
Partner, Head of  
Investor Relations  
**BC Partners**

# Featured speakers

[View speakers](#) ↻



**Colleen McKenzie**  
Vice President,  
Investor Relations  
**Butterfly**



**Jeff Mills**  
Partner, Global  
Head of Investor  
Relations  
**RCF**



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



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



**Candice Sorbera**  
Managing Director,  
Head of Investor  
Relations  
**Butterfly**



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



**Sarah Tomolonius**  
VP, Investor Relations  
**M13**



**Nathan Urquhart**  
Partner and Global  
Head of Investor  
Relations  
**Carlyle**



**Liz Weiner**  
Partner & Co-Founder  
**Felix / Weiner**  
Consulting Group



**Kenya Williams**  
Managing Director and  
Product Specialist  
**Oaktree**



**Kristin Williamson**  
Head of Corporate  
Marketing and  
Communications  
**Hamilton Lane**



# In-person networking opportunities

Connect with the **expansive community** of industry professionals who are attending the Forum.

# 1

## **Think tanks**

Hear best practices from industry leaders, discuss how to build and advance your career, and brainstorm marketing and communications strategies for success.

# 2

## **Preconference workshops**

Discover how you can successfully redefine your company's culture and maneuver the great resignation by properly recruiting and retaining talent.

# 3

## **Coffee house chats**

These deep-dive discussions will explore how to strengthen LP loyalty, generate more first-time allocations, optimize online communication, and provide consistent messaging to the board and investors.

# 4

## **Networking**

Mingle with peers in-between sessions, at luncheons, during the cocktail reception, and at designated networking breaks to build your connections with fellow industry professionals.

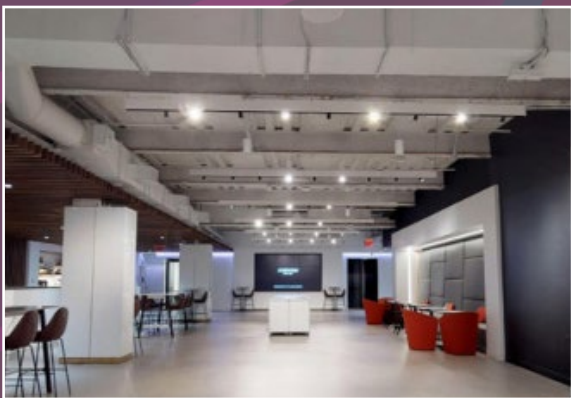
# Preliminary attendee list

## Confirmed attendees for 2022 include:

- » Access Holdings
- » ACME
- » Actis
- » Advent International
- » AEA Investors
- » American Securities
- » Anduin
- » Anzu Partners
- » Apollo Global Management
- » ArchiMed
- » Arclight Capital Partners
- » Audax Group
- » Audax Private Equity
- » BC Partners
- » BentallGreenOak
- » Blackstone
- » Brightstar Capital Partners
- » Butterfly
- » Canyon Clo Advisors
- » Capstreet Group
- » Carlyle Group
- » Carval Investors
- » Castlake
- » Catterton Partners
- » CBRE Group
- » Centerbridge Capital Partners
- » Charlesbank Capital Partners
- » Cloud Theory
- » Collier Capital
- » Crow Holdings
- » CRV
- » EnCap Investments
- » Fairview Partners
- » Federated Hermes
- » Felix / Weiner Consulting Group
- » FFL
- » Fondo
- » Frontier Capital
- » Gatewood
- » General Atlantic
- » Great Hill Partners
- » Hamilton Lane
- » HCI Equity Partners
- » Hines Interests
- » Inari Capital
- » Infranode
- » Insight Equity Holdings
- » Instar Asset Management
- » Institutional Venture Partners
- » Invesco
- » Ivanhoé Cambridge
- » Kayne Anderson Capital Advisors
- » Kelso & Co.
- » KPS Capital Partners
- » LEM Capital
- » Levine Leichtman Capital Partners
- » Lloyd Jones
- » LLR Partners
- » Lovell Minnick Partners
- » M13 Ventures
- » Marlin Equity Partners
- » Mesirow
- » MetLife Investment Management
- » Monomoy Capital Partners
- » New Mountain Capital
- » North Peak Capital
- » Oak HC/FT
- » Odyssey Investment Partners
- » OpenGate Capital
- » Orchard Global Asset Management
- » Orion Resource Partners
- » Peachtree Hotel Group
- » Pelion Venture Partners
- » Pivotal Life Sciences
- » Redesign Health
- » Resource Capital Funds
- » Rhone Capital
- » Sands Capital Management
- » Slate Asset Management
- » Sterling Group
- » Summit Park
- » Ta Associates
- » Thoma Bravo
- » Tiaa
- » Trilantic North America
- » Unigrains
- » Viking Global Investors
- » Voyager Capital
- » Warburg Pincus & Co.
- » Waterton Associates
- » Welsh, Carson, Anderson & Stowe
- » Westcap Group
- » WM Partners
- » ...and more

# Venue and hotel

[Book a room ↗](#)



## Convene

117 West 46th St  
New York, NY 10036



## Kimpton Muse Hotel

130 West 46th Street  
New York, NY 10036

**All conference sessions will take place at Convene.** We have also reserved a room block at the Kimpton Muse Hotel for attendees at a discounted rate.\* To reserve your room at the hotel, click the "book a room" button in the top right corner or call reservations and mention **PEI's Investor Relations, Marketing & Communications Forum at 1-800-KIMPTON.**

**\*The group rate is only available until March 28, 2022**

# Sponsors

[View all sponsors ↗](#)

## Lead Sponsors

**Davis Polk**



## Sponsors



DiligenceVault



Juniper Square



## Supporting associations



## Media partners

**Buyouts**

**PE Hub**

**Venture Capital Journal**

## Host publication

**Private Equity International**

For information on the available sponsorship opportunities, contact **Tyler Mitchell** at [tyler.m@peimedia.com](mailto:tyler.m@peimedia.com) or call **+1 646 795 3279**

# Event tickets

Secure your place today to network with industry peers and learn from experienced professionals in the private equity investor relations, marketing, and communications space.

**General delegate US \$3,250**

General delegate passes are for fund of funds managers or in-house IR, marketing, and communications professionals at private equity or venture capital firms.



*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

**Secure your  
place today** ↻

For program information:

**Melissa Baer**

melissa.b@peimedia.com  
+1 917 243 0501

For sponsorship opportunities:

**Tyler Mitchell**

tyler.m@peimedia.com  
+1 646 795 3279

For registration questions:

**Customer Services**

customerservices@peimedia.com  
+1 212 633 1073