

# Investor Relations, Marketing & Communications Forum New York 2024

April 10-11, 2024  
Convene, 117 W 46th St, New York

## Investor Relations, Marketing & Communications Forum

### Keynote Speakers

Ernesto Anguilla, Partner, Head of Communications & Public Affairs, Bain Capital  
Mary Armstrong, Managing Director, Global Head of Marketing & Communications, General Atlantic  
Jeffrey Kauth, Managing Director, Global Public Affairs, Blackstone

### Speakers

Dominique Ahumada, Head of Capital Partnerships, Lead Edge Capital  
Rush Baker, Partner, Head of Investor Relations, Edison Partners  
Devin Banerjee, Senior Managing Editor, Industry News and Community, LinkedIn  
Rich Beecher, Managing Director, Head of Investor Relations, Fundamental Advisors  
Andrew Campbell, Partner, DC Capital Partners  
Andrea Chrysanthou, Vice President, TAS  
Kelsey Clute, VP Investor Relations Arlington Capital Partners  
Catherine Coleman, Head of Investor Relations, WindRose Health Investors  
Michelle Daubar, Partner Investor Relations and Communications, Oaktree HC/FT  
Chelsea Dodge, Head of Investor Relations, Fin Capital  
Chris Donahoe, Head of AI Strategy, Edelman Smithfield  
Rebeca Ehrnrooth, Managing Director, Head of Investor Network, Equilibrium Capital  
Tim Flannery, CEO and Co-Founder, Passthrough  
Drew Fox, Head of Investor Relations & Fundraising, North America, 17Capital  
Katja Gagen, Operating Partner - Marketing & Communication, Playground Global  
Karen Derr Gilbert, Partner, FTV Capital  
Dana Goldstein, Managing Director, Head of Investor Relations, Anthos Capital  
Nicola Goll, Portfolio Manager, Head Multi-Managers Private Equity Americas, UBS  
Brendan Gover, Vice President, Investor Relations, Slate Asset Management  
Carla Grace, Managing Director, Due Diligence and Investor Relations, Hines  
Sarah Grenon, Head of Marketing, North America, Impax Asset Management  
Lindsay Grider, Global Head of Fundraising & Investor Relations, Levine and Leichtman Capital Partners  
Colin Hannaway, Managing Director, H.I.G. Capital  
Andrew Harris, Managing Director, Head of Investor Relations and ESG, Tiger Infrastructure Partners  
Jillian Hazelton, Head of Marketing & Communications, Bregal Investments  
Samantha Hewitt, Director, Investor Relations, Abbott Capital Management  
Judy Hugen, Head of Investor Relations, TT Capital Partners  
Ryan Hughes, Head of Investor Relations, Stellus Capital  
Radhika Iyer, Managing Director, Head of Marketing, Energy Impact Partners  
Amon Johnson, Managing Director, Star Mountain Capital  
Kathryn Kantarian, Principal, Investor Relations, Freedom 3 Capital  
Greg Kaufmann, Director, Gridline  
Erin Kitchell, Partner, Head of Investor Relations, Goodwater Capital  
Richard Lichter, Vice Chair and Founder, Newbury Partners - Bridge LLC  
Ken MacFadyen, Director, Marketing & Communications, Audax Group  
Rich Maass, Managing Director, Investor Relations, Searchlight Capital Partners  
Eliza McGrath, Principal, Head of Investor Relations, Hastings Equity Partners



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Oren Michaely, Director of AI, Motive Partners  
Sora Monachino, Principal, Head of Investor Relations, Victory Park Capital Advisors  
Charlotte Morse, Managing Director, Head of Investor Relations & Marketing, Bridge Investment Group  
Meghan Munchoff, Managing Director, Head of Investor Relations, 400 Capital Management  
Allan Petersen, Managing Director, Investor Relations, Nautic Partners  
Britney Potapchuk, Vice President, Head of Marketing Compliance, HarbourVest Partners  
Kathryn Pothier, Partner, Head of Investor Relations, Epiris  
Jodi Rubenstein, Managing Director, GTCR  
Morgan Schmit-Sobeck, Principal, Investor Relations, Clayton, Dubilier and Rice  
Anar Shah, Head of Investor Relations, Lionstone Investments  
Charlotte Shropshire, Head of Investor Relations, Menlo Ventures  
Jacob Shulman, Director of Investor Relations, Oak Hill Capital  
Soo Song, Head of Marketing, WiL (World Innovation Lab)  
Tess Sprechman, Head of Investor Relations, AE Industrial Partners  
Annis Steiner, Principal, Marketing and Communications, FTV Capital  
Susan Stella, Head of Investor Relations and Impact, Activate Capital  
Dan Sullivan, Sales Executive for the Americas, DiligenceVault  
Lindsey Swanson, Head of Investor Relations, BBH Capital Partners  
Benjamin Thorndike, Managing Director, Head of Infrastructure IR, Manulife Investment Management  
Monica Vitoria, Partner, Head of Investor Relations, Stripes  
Joanna Weiss, Director Investor Relations, Trispan  
Sonja Weiss, Manager, Investor Relations, Instar Asset Management  
Kristin Williamson, Head of Corporate Marketing & Communications, Hamilton Lane  
Ana Yoerg, Vice President, Marketing, At One Ventures

## 2024 Agenda

**Day 1:** April 10, 2024

**8:00** Registration – Continental Breakfast

**8:00** Pre-conference breakfast meetings

### Meeting A

#### **Optimize your brand: Work on a rebrand or new brand strategy**

- Get the organization on board
- How to tailor multiple stories for various constituencies (e.g., prospects, and clients the public)
- Action planning (sequence)
- Budget for brand

### Meeting B

#### **Investor Engagement**

#### **Manage multiple strategies for telling your story to multiple investor types**

- Contrast characteristics different investor types
- Breakdown needs of investor types
- Maintain brand integrity while tailoring your story

### Meeting C

#### **Invite only VIP**



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- Evaluate outcomes and KPIs to measure efficacy

#### Panelists

- **Kelsey Clute**, VP Investor Relations, **Arlington Capital Partners**
- **Kristin Williamson**, Head of Corporate Marketing & Communications, **Hamilton Lane**
- **Samantha Hewitt**, Director, Investor Relations, **Abbott Capital Management**
- **Sarah Grenon**, Head of Marketing, North America, **Impax Asset Management**

- Discuss how nuances influence where and how to reach different constituencies

#### Panelists

- **Kathryn Kantarian**, Principal, Investor Relations, **Freedom 3 Capital**
- **Jillian Hazelton**, Head of Marketing & Communications, **Bregal Investments**
- **Charlotte Morse**, Managing Director, Head of Investor Relations & Marketing, **Bridge Investment Group**
- **Rush Baker**, Partner, Head of Investor Relations, **Edison Partners**

**9:15**      **Opening remarks & chair's welcome**

## **09:30**      **Keynote Fireside Chat**

A reflection and projection of the role of communications in private markets. Get insights on the challenges inherent to the shifting expectations and demands of private equity and how communication executives must adapt.

#### *Moderator*

**Devin Banerjee**, Senior Managing Editor, Industry News and Community, **LinkedIn**

#### *Keynote*

**Ernesto Anguilla**, Partner, Head of Communications & Public Affairs, **Bain Capital**

## **10:15**      **LP Panel: Walk a mile in an investor's inbox**

- Hear from actual LPs: What they are looking for and how they choose new managers
- Best practices for communicating with LPs – from the first email to subdocs., make your fund stand out
- What to do when you're not fundraising – how to build and maintain relationships
- Putting your best foot forward thru your AGM, social media, quarterly reports and more
- Hear techniques for staying involved with your LPs: how (and how much) they want to hear from you

#### *Moderator*

**Tim Flannery**, CEO and Co-Founder, **Passthrough**

#### *Panelists*



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Nicola Goll, Portfolio Manager, Head Multi-Managers Private Equity Americas, UBS

11:05      Networking break

## 11:35      Breakout Sessions

### Diversify your funding base: Sovereign and global family offices and institutional investors

- Understand which pools of capital are best suited for your strategy and firm
- Navigate challenges as you address regional expectations and regulations
- Vet and manage outside counsel and placement agents
- Identify and conform to nuanced cultural norms

#### Panelists

- Karen Derr Gilbert, Partner, **FTV Capital**
- Andrew Campbell, Partner, **DC Capital Partners**
- Dominique Ahumada, Head of Capital Partnerships, **Lead Edge Capital**
- Brendan Gover, Vice President, Investor Relations, **Slate Asset Management**

### Investor Engagement

### Leverage technology to prospect and attract new investors

- CRM best practices to manage investor relationships
- Using social media platforms to build brands and engage with investors
- Digital strategies that drive lead generation
- Identify what data is most relevant

#### Panelists

- Meghan Munchoff, Managing Director, Head of Investor Relations, **400 Capital Management**
- Radhika Iyer, Managing Director, Head of Marketing, **Energy Impact Partners**
- Soo Song, Head of Marketing, **WiL (World Innovation Lab)**
- Amon Johnson, Managing Director, **Star Mountain Capital**

12:25      Networking luncheon

## 1:25      Think tank sessions (GP-Only)

### Think tank A

#### Small-Midsize Firms (1-4 Team Members)

- What are the most valuable skillsets and competencies of someone in your role
- Discuss strategies to build lean teams
- Garner allies and collaborate in your firm

### Think tank B

#### Midsize-Large Firms (5+Team Members)

- Determine whether to use external agents or keep it in house
- Provide career path develop staff's professional growth accordingly
- Balance team with professionals with disparate backgrounds and skills

### Think tank C

#### Thought Leadership: Service Providers

- What works and doesn't work for positioning your company or yourself as a thought leader
- Recruit top talent
- Meet client needs with the two-way communication between external facing and internal-facing functions



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- Explore prioritization drivers
- Define and attain your target employee

*Facilitator*

**Ken MacFadyen**, Director, Marketing & Communications, **Audax Group**

- How do you define investor coverage and allocate responsibilities across the team

*Facilitator*

**Morgan Schmit-Sobeck**, Principal, Investor Relations, **Clayton, Dubilier & Rice**

**2:15**      **Networking break**

## **2:45**      **Breakout Sessions**

### **Determine the narrative for your story**

- Convey a unique story
- Create a consistent and transparent message
- Leverage emotion to draw interest and other clickbait-worthy tips
- Educate to engage through content across mediums

*Panelists*

- **Andrea Chrysanthou**, Vice President, **TAS**
- **Katja Gagen**, Operating Partner - Marketing & Communication, **Playground Global**
- **Annis Steiner**, Principal, Marketing and Communications, **FTV Capital**
- **Eliza McGrath**, Principal, Head of Investor Relations, **Hastings Equity Partners**
- 

### **Work smarter: AI's opportunities, risks and challenges**

- Reporting and other use cases
- Survey the market landscape to identify risk and opportunity
- Identify LP questions/concerns and generate strategic responses

*Moderator*

**Chris Donahoe**, Head of AI Strategy, **Edelman Smithfield**

*Panelists*

- **Oren Michaely**, Director of AI, **Motive Partners**
- **Charlotte Shropshire**, Head of Investor Relations, **Menlo Ventures**

## **3:35**      **Breakout Sessions**

### **Media and public relations and you**

- The value of media relationships in a crisis and maintain relationships
- Proactive tactics for building media relationships
- Preparations for firm to handle crises
- Lessons learned from case examples of crisis management

### **Investor Engagement**

#### **Make impactful first impressions**

- Key areas for standing out and thriving in this digital era
- Differentiating yourself through your story and data
- Brand road mapping, website development, digital marketing, and data visualization

*Panelists*

- **Drew Fox**, Head of Investor Relations & Fundraising, North America, **17Capital**
- **Jodi Rubenstein**, Managing Director, **GTCR**



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- **Michelle Daubar**, Partner Investor Relations and Communications, **Oaktree HC/FT**
- **Erin Kitchell**, Partner, Head of Investor Relations, **Goodwater Capital**

## 4:25 Breakout Sessions

### Firm up your LP base: Trends in fund terms

- Align interests through terms0
- Impact of the Private Fund Adviser Rules on preferential treatment
- Get the economics of co-invests right
- Discuss examples of side letter agreements

#### Panelists

- **Ryan Hughes**, Managing Director, Head of Investor Relations, **Stellus Capital**
- **Allan Petersen**, Managing Director, Investor Relations, **Nautic Partners**
- **Rebeca Ehrnrooth**, Managing Director, Head of Investor Network, **Equilibrium Capital**

### Investor Engagement

#### Create data visualizations that resonate with new LPs

- Discuss what data LPs want and what is most valuable to different investor types
- Explore tools and techniques to collect and analyze
- Discuss what formats work best in difference channels
- Consider future possibilities/roles of AI
- Comply with the SEC Marketing rule

#### Panelists

- **Andrew Harris**, Managing Director, Head of Investor Relations and ESG, **Tiger Infrastructure Partners**
- **Rich Beecher**, Managing Director, Head of Investor Relations, **Fundamental Advisors**
- **Britney Potapchuk**, Vice President, Head of Marketing Compliance, **HarbourVest Partners**

## 5:15 Cocktail reception



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**Day 2:** April 11, 2024

**8:00 Continental Breakfast**

**8:00 Pre-conference breakfast meetings**

## Meeting A

### Win allies and collaborate internally across your organization

- Tips for treating internal partners as clients
- Convey marketing imperatives to C-level, sales Legal, compliance, investment and marketing teams
- Collaboration is a two-street- get and use input/feedback
- Consider all stakeholders when taking on a project

#### *Panelists*

- **Carla Grace** Investor Relations and Due Diligence, **Hines**
- **Benjamin Thorndike**, Managing Director, Head of Infrastructure Investor Relations, **Manulife Investment Management**
- **Tess Sprechman**, Head of Investor Relations, **AE Industrial Partners**
- **Catherine Coleman**, Head of Investor Relations, **WindRose Health Investors**

## Meeting B

### Replicate Funding Best Practices

- Fundraising is more challenging today than in recent years, learn from veterans of capital formation what's working and how they are adapting
- Setting realistic fundraising targets and managing expectation of internal stakeholders
- Always be closing – strategies for an effective close

#### *Panelists*

- **Rich Maass**, Managing Director, Investor Relations, **Searchlight Capital Partners**
- **Richard Lichter**, Vice Chair and Founder, **Newbury Partners - Bridge LLC**
- **Monica Vitoria**, Partner, Head of Investor Relations, **Stripes**
- **Lindsay Grider**, Global Head of Fundraising, **Levine Leichtman Capital Partners**

## Meeting C

### A democratic revolution? Find success in retail and HNW channels

- Is your firm and fund well suited for individual investors?
- Tailoring a fund and fundraising strategy to this segment
- Meet the new gatekeepers and understand the economics of platforms
- The importance of education

#### *Panelists*

- **Chelsea Dodge**, Head of Investor Relations, **Fin Capital**
- **Lindsey Swanson**, Head of Investor Relations, **BBH Capital Partners**
- **Anar Shah**, Head of Investor Relations, **Lionstone Investments**
- **Jacob Shulman**, Director of Investor Relations, **Oak Hill Capital**

**8:45 Think tank sessions (GP-Only)**

## Think tank A

### Building strategic partnerships with LPs

- What does a strategic partner entail?
- Make LP and GP partnerships mutually beneficial

#### *Facilitator*

## Think tank B

### Communicating with LPs in times of stress

- How IR execs can prepare for conversations around negative news with LPs
- Manage media and headline risk
- Forge partnership mentalities that endure times of stress

## Think tank C

### Investor Engagement

#### Consultant Relations

- Best practices when engaging with investment consultants
- When to hire a dedicated consultant-relations professional
- Navigate the organization, (e.g., when to engage the research team, field consultants and end clients)



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**July Hugen**, Head of Investor Relations,  
**TT Capital Partners**

- Explore the limits of zoom/digital communication

*Facilitator*  
**Kathryn Pothier**, Partner, Head of  
Investor Relations, **Epiris**

*Facilitator*  
**Sora Monachino**, Principal, Head of  
Investor Relations, **Victory Park Capital  
Advisors**

**9:35**      **Networking coffee break**

**10:05**      **Keynote**

A conversation with investor relations and communications leaders on how they are reaching investors

*Keynotes*

**Mary Armstrong**, Managing Director, Global Head of Marketing & Communications, **General Atlantic**  
**Jeffrey Kauth**, Managing Director, Global Public Affairs, **Blackstone**

**10:50**      **Integrate technology for a more efficient organization**

- Discover the latest technologies for effective fundraising campaigns
- Identify pitfalls and prerequisites to integrating technology
- Prepare various constituencies at different levels of adoption readiness(/willingness)
- Use technology to deal with rise of mandatory reporting requirements

*Panelists*

- **Greg Kaufmann**, Director, **Gridline**
- **Susan Stella**, Head of Investor Relations and Impact, **Activate Capital**
- **Sonja Weiss**, Manager, Investor Relations, **Instar Asset Management**

**11:35**      **Host must-attend AGMs**

- Determine AGM objectives and align format and content
- Debate merits and drawbacks of hybrid and virtual formats
- Find the right balance of passive and interactive programming
- Post-AGM surveys that you can use
- Goals and methods of following up with participants
- What new technologies do you deploy at your annual meetings?

*Panelists*

- **Ana Yoerg**, Vice President, Marketing, **At One Ventures**
- **Joanna Weiss**, Director Investor Relations, **Trispan**
- **Dana Goldstein**, Managing Director, Head of Investor Relations, **Anthos Capital**
- **Colin Hannaway**, Managing Director, **H.I.G. Capital**



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12:20

## Carousel (GP-ONLY)

*Following our popular roundtable format, tables will share best practices in two areas.  
Each table will report back to the whole group the key practices in one category.*

### **The Carousel is a GP-Only gathering.**

Join your peers for candid discussions in a closed-door setting, with no media, vendors, or service providers in the room. These table-based discussions emphasize quality over quantity by facilitating small-group discussions. All tables will discuss the two topics below.

#### Investor Engagement

- **Fortify integrity and consistency of your brand**
- **Leverage social media platforms to cultivate new investor relationships**

1:30

## Luncheon

2:30

## End of conference