

Investor Relations, Marketing & Communications Forum New York 2024

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

Investor Relations, Marketing & Communications Forum Confirmed Speakers

Keynote Speaker

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

Speakers

Dominique Ahumada, Head of Capital Partnerships, Lead Edge Capital
Rush Baker, Partner, Head of Investor Relations, Edison Partners
Andrew Campbell, Partner, DC Capital Partners
Andrea Chrysanthou, Vice President, TAS
Kelsey Clute, VP Investor Relations Arlington Capital Partners
Chelsea Dodge, Head of Investor Relations, Fin Capital
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
Brendan Gover, Vice President, Investor Relations, Slate Asset Management
Carla Grace, Managing Director, Due Diligence and Investor Relations, Hines
Lindsay Grider, Global Head of Fundraising & Investor Relations, Levine and Leichtman
Capital Partners
Audrey Harris, Head of Marketing, Alpine Investors
Jillian Hazelton, Head of Marketing & Communications, Bregal Investments
July Huguen, Head of Investor Relations, TT Capital Partners
Ryan Hughes, Head of Investor Relations, Stellus Capital
Kathryn Kantarian, Principal, Investor Relations, Freedom 3 Capital
Greg Kaufmann, Director, Gridline
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
Oren Michaely, Director of AI, Motive Partners
Charlotte Morse, Managing Director, Head of Investor Relations & Marketing, Bridge
Investment Group
Meghan Munchoff, Managing Director, Head of Investor Relations, 400 Capital
Management
Kathryn Pothier, Partner, Head of Investor Relations, Epiris
Morgan Schmit-Sobeck, Principal, Investor Relations, Clayton, Dubilier and Rice



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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
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
Lindsey Swanson, Head of Investor Relations, BBH Capital Partners
Benjamin Thorndike, Managing Director, Head of Infrastructure Investor Relations,
Manulife Investment Management
Monica Vitoria, Partner, Head of Investor Relations, Stripes
Joanna Weiss, Director Investor Relations, Trispan
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
- 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

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
- 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**

Meeting C

Invite only VIP



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- **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.

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**

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

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



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- 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**

- 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)**

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
- Explore prioritization drivers
- Define and attain your target employee

Facilitator

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

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

Facilitator

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

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

2:15 **Networking break**

2:45 **Breakout Sessions**

Determine the narrative for your story

- Convey a unique story
- Create a consistent and transparent message

Work smarter: AI's opportunities, risks and challenges

- Reporting and other use cases



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- Discuss marketing as a critical lever for sourcing/business development
- 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**

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

Panelists

- **Oren Michaely**, Director of AI, **Motive Partners**
- **Susan Stella**, Head of Investor Relations and Impact, **Activate Capital**
- **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
- Brand road mapping, website development, digital marketing, and data visualization

Panelists

Drew Fox, Head of Investor Relations & Fundraising, North America, **17Capital**

4:25 Breakout Sessions

Firm up your LP base: Trends in fund terms

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

Panelists

Rebeca Ehrnrooth, Managing Director, Head of Investor Network, **Equilibrium Capital**

Investor Engagement

Create data visualizations that resonate with new LPs

- Determine what data matters based on relevance and value 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
- Maintain compliance with the SEC Marketing rule?

5:15 Cocktail reception



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Day 2: April 11, 2024

8:00 Continental Breakfast

8:00 Pre-conference breakfast meetings (Invite-only)

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**

Meeting B

VIP Invitation Only

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 fund raising 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

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

Think tank C

Investor Engagement Consultant Relations

- Best practices when engaging with investment consultants
- When to hire a dedicated consultant-relations professional



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

- Forge partnership mentalities that endure times of stress
- Explore the limits of zoom/digital communication

- Navigate the organization, (e.g., when to engage the research team, field consultants and end clients)

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

9:35 **Networking coffee break**

10:05 **Keynote**

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

Mary Armstrong, Managing Director, Global Head of Marketing & Communications, **General Atlantic**

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

- Discover the latest technologies for effective fundraising campaigns
- Discuss the dos and don'ts when integrating technology
- Market and communicate efficiently
- Identify pre-requisites to integration of technology

Panelists

Greg Kaufmann, Director, **Gridline**

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**

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12:20 Fundraising 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.*

Carousels are GP-Only gatherings.

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.

Investor Engagement

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

12:20 Luncheon

1:20 End of conference



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