

# 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  
Andrew Tirbeni, Managing Director, Client Relations and Capital Raising, EQT Group

### Speakers

Mary E. Adams, CMP, Founder & CEO, Avivant Partners  
Dominique Ahumada, Head of Capital Partnerships, Lead Edge Capital  
Brian Anderson, Senior Conference Producer, Private Equity International  
Rush Baker, Partner, Head of Investor Relations, Edison Partners  
Michael Bane, Head of Americas Investor Relations & Senior Managing Director, Ardian  
Devin Banerjee, Senior Managing Editor, Industry News and Community, LinkedIn  
Rich Beecher, Managing Director, Head of Investor Relations, Fundamental Advisors  
Dominic Borrash, Portfolio Manager, Private Equity, AustralianSuper  
Caitlin Brodie, Managing Director, The Carlyle Group  
Nadine Cannata, Managing Director, Marketing, Northleaf Capital Partners  
Rebecca Chia, Head of Business Development and Investor Relations, Atalaya Capital Management  
Kelsey Clute, VP Investor Relations Arlington Capital Partners  
Jack Cohen, Vice President of Content & Engagement, General Catalyst  
Catherine Coleman, Head of Investor Relations, WindRose Health Investors  
Noreen Crowe, VP of Product Management, SS&C Intralinks  
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  
Rebecca Ehrnrooth, Managing Director, Head of Investor Network, Equilibrium Capital  
John Fitzpatrick, Senior Managing Director, Chief Technology Officer, Blackstone  
Tim Flannery, CEO and Co-Founder, Passthrough  
Mary Kate (MK) Flynn, Editor-in-Chief, PE Hub & PE Hub Europe  
Ann Folkman, Chief Marketing Officer, AB CarVal  
Drew Fox, Head of Investor Relations & Fundraising, North America, 17Capital  
Katja Gagen, Operating Partner - Marketing & Communications, Playground Global  
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, LLC  
Britney Hamberg, Principal, Investor Relations & Operations, RC Capital  
Colin Hannaway, Managing Director, H.I.G. Capital  
Andrew Harris, Managing Director, Head of Investor Relations and ESG, Tiger Infrastructure Partners  
Rachel Hassett, Head of Marketing and Communications, Mill Creek Capital Advisors



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Jillian Hazelton, Head of Marketing & Communications, Bregal Investments  
Samantha Hewitt, Director, Investor Relations, Abbott Capital Management  
Michael Hong, Partner,, Davis Polk & Wardwell  
Cara Hubbard, Managing Director, Wellington Management  
Judy Hugen, 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  
Lindsey King, Partner and Head of Investor Relations, Crestview Partners  
Hye Kyung (HK) Lee, Chief Strategy Officer, InvestorFlow  
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  
Allen Mask, Partner, WestCap; Head of CōLab  
Eliza McGrath, Principal, Head of Investor Relations, Hastings Equity Partners  
Natalya Michaels, Managing Director, Head of Investor Relations, Paine Schwartz Partners  
Oren Michaely, Director of AI, Motive Partners  
Cristina Moldovan, Managing Director, Summit Rock Advisors  
Sora Monachino, Managing Director, Head of Investor Relations, Victory Park Capital Advisors  
Charlotte Morse, Managing Director, Head of IR & Marketing, Bridge Investment Group  
Meghan Munchoff, Managing Director, Head of Investor Relations, 400 Capital Management  
Alli Murdoff, Partner, Marketing, Section Partners  
Eric Newman, Accountant, Treasury Manager and Trustee, City of Stamford  
Sophie Panarese, Head of Platform & Operations, 186 Ventures  
Drake Paulson, VP of Customer Success and Partnerships, Anduin  
Allan Petersen, Managing Director, Investor Relations, Nautic Partners  
John Polis, COO and CTO, Star Mountain Capital  
Britney Potapchuk, Vice President, Head of Marketing Compliance, HarbourVest Partners  
Tim Quinn, Executive Vice President, Edelman Smithfield  
Peter Rosenstein, Chief Product Officer, Gen II  
Jodi Rubenstein, Managing Director, GTCR  
Zach Russo, Creative Director, RF Studio53  
Emily Schillinger, Senior Vice President of Public Affairs, American Investment Council  
Morgan Schmit-Sobeck, Principal, Investor Relations, Clayton, Dubilier and Rice  
Antonia Schwartz, Head of Investor Relations, Lotus Infrastructure Partners  
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  
Robyn Slutzky, Partner, Head of Capital Solutions, Arctos  
Brian Smiga, Co-founding Partner, Alpha Partners  
Soo Song, Head of Marketing, WiL (World Innovation Lab)  
Steven Spencer, Chief Legal Officer and Chief Compliance Officer, Siris Capital Group  
Tess Sprechman, Head of Investor Relations, AE Industrial Partners



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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 Mgt  
Maura Turner, Head of Marketing and Communications, Charlesbank Capital Partners  
Louise Verga, Managing Director, Head of Americas, Dasseti  
Emily Victor-Smith, Principal, IR and Marketing, Welsh, Carson, Anderson & Stowe  
Monica Vitoria, Partner, Head of Investor Relations, Stripes  
Kate Watts, CEO, Long Dash  
Joanna Weiss, Director Investor Relations, Trispan  
Sonja Weiss, Manager, Investor Relations, Instar Asset Management  
Ana Yoerg, Vice President, Marketing, At One Ventures

## 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

*Moderator*

**Jack Cohen**, Vice President of Content & Engagement, **General Catalyst**

*Panelists*

- **Kelsey Clute**, VP Investor Relations **Arlington Capital Partners**

### 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

*Moderator*

**Zach Russo**, Creative Director, **RF Studio53**

*Panelists*

- **Kathryn Kantarian**, Principal, Investor Relations, **Freedom 3 Capital**

### Meeting C: Invite only VIP

**Breakfast Meeting C: Invite Only VIP**  
**The Role of the Modern Marketer: Leveraging Creativity as a Force for Growth**

- Delivering on the promise of value creation to LPs and portfolio companies
- Investing in creative services as a point of differentiation
- Navigating today's marketing challenges and trends with your portfolio companies

*Moderator*

**Tim Quinn**, Executive Vice President, **Edelman Smithfield**

*Panelist*

**Allen Mask**, Partner, **WestCap**; Head of **CōLab**



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- **Samantha Hewitt**, Director, Investor Relations, **Abbott Capital Management**
- **Sarah Grenon**, Head of Marketing, North America, **Impax Asset Management**
- **Natalya Michaels**, Managing Director, Head of Investor Relations, **Paine Schwartz Partners**
- **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**  
**Caitlin Brodie**, Managing Director, **The Carlyle Group**

## **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*

- **Nicola Goll**, Portfolio Manager, Head Multi-Managers Private Equity Americas, **UBS**
- **Eric Newman**, Accountant, Treasury Manager and Trustee, **City of Stamford**
- **Dominic Borrassch**, Portfolio Manager, Private Equity, **AustralianSuper**
- **Cristina Moldovan**, Managing Director, **Summit Rock Advisors**



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11:05      Networking break

## 11:35      Breakout Sessions

### Diversify your funding base: Looking abroad

- 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

#### Moderator

**Robyn Slutzky**, Partner, Head of Capital Solutions, **Arctos**

#### Panelists

- **Dominique Ahumada**, Head of Capital Partnerships, **Lead Edge Capital**
- **Brendan Gover**, Vice President, Investor Relations, **Slate Asset Management**
- **Lindsey King**, Partner and Head of Investor Relations, **Crestview Partners**
- **Jacob Shulman**, Director of Investor Relations, **Oak Hill Capital**

### 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

#### Moderator

**Meghan Munchoff**, Managing Director, Head of Investor Relations, **400 Capital Management**

#### Panelists

- **Soo Song**, Head of Marketing, **WiL (World Innovation Lab)**
- **John Polis**, COO and CTO, **Star Mountain Capital**
- **Noreen Crowe**, VP of Product Management, **SS&C Intralinks**

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

### 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

### 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



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- Garner allies and collaborate in your firm
- Explore prioritization drivers
- Define and attain your target employee

*Facilitator*

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

- 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**

between external facing and internal-facing functions

*Facilitator*

**Dan Sullivan**, Sales Executive for the Americas, **DiligenceVault**

## 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 audience-building tips
- Educate to engage through content across mediums

*Moderator*

**Kate Watts**, CEO, **Long Dash**

*Panelists*

- **Katja Gagen**, Operating Partner - Marketing & Communications, **Playground Global**
- **Annis Steiner**, Principal, Marketing and Communications, **FTV Capital**
- **Eliza McGrath**, Principal, Head of Investor Relations, **Hastings Equity Partners**
- **Nadine Cannata**, Managing Director, Marketing, **Northleaf Capital 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*

- **John Fitzpatrick**, Senior Managing Director, Chief Technology Officer, **Blackstone**
- **Oren Michaely**, Director of AI, **Motive Partners**
- **Charlotte Shropshire**, Head of Investor Relations, **Menlo Ventures**
- **Rebecca Chia**, Head of Business Development and Investor Relations, **Atalaya Capital Management**

## 3:35 Breakout Sessions

### Enhance and protect your firm's brand and reputation

- Use social media to your advantage
- Do's and don'ts for working with the media
- Crisis management and messaging

### Investor Engagement

### Make impactful first impressions

- Key areas for standing out and thriving in this digital era
- Differentiating yourself through your story and data



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- Counter potential backlash against ESG and DEI

#### Moderator

**Rachel Hassett**, Head of Marketing and Communications, **Mill Creek Capital Advisors**

#### Panelists

- **Ann Folkman**, Chief Marketing Officer, **AB CarVal**
- **Emily Schillinger**, Senior Vice President of Public Affairs, **American Investment Council**
- **Maura Turner**, Head of Marketing and Communications, **Charlesbank Capital Partners**
- **Emily Victor-Smith**, Principal, Investor Relations and Marketing, **Welsh, Carson, Anderson & Stowe**

- Brand road mapping, website development, digital marketing, and data visualization

#### Moderator

**Sophie Panarese**, Head of Platform & Operations, **186 Ventures**

#### Panelists

- **Drew Fox**, Head of Investor Relations & Fundraising, North America, **17Capital**
- **Jodi Rubenstein**, Managing Director, **GTCR**
- **Michelle Daubar**, Partner Investor Relations and Communications, **Oaktree HC/FT**
- **Britney Hamberg**, Principal, Investor Relations & Operations, **RC 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

#### Moderator

**Michael Hong**, Partner, **Davis Polk & Wardwell**

#### 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**
- **Steven Spencer**, Chief Legal Officer and Chief Compliance Officer, **Siris Capital Group**

### Investor Engagement

### Create content that resonates 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

#### Moderator

**Rich Beecher**, Managing Director, Head of Investor Relations, **Fundamental Advisors**

#### Panelists

- **Andrew Harris**, Managing Director, Head of Investor Relations and ESG, **Tiger Infrastructure Partners**
- **Britney Potapchuk**, Vice President, Head of **Marketing Compliance**, **HarbourVest Partners**
- **Peter Rosenstein**, Chief Product Officer, **Gen II**
- **Louise Verga**, Managing Director, Head of Americas, **Dasseti**

## 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

#### *Moderator*

**Antonia Schwartz**, Head of Investor Relations, **Lotus Infrastructure Partners**

#### *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

#### *Moderator*

**Hye Kyung (HK) Lee**, Chief Strategy Officer, **InvestorFlow**

#### *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, **LLCP**

## 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

#### *Moderator*

**Cara Hubbard**, Managing Director, **Wellington Management**

#### *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**
- **Brian Smiga**, Co-founding Partner, **Alpha Partners**

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

## Think tank A

### Building strategic partnerships with LPs

- What does a strategic partner entail?

## Think tank B

### Communicating with LPs in times of stress

## Think tank C

### Investor Engagement Consultant Relations

- Best practices when engaging with investment consultants



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- Make LP and GP partnerships mutually beneficial

*Facilitator*

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

- 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
- Explore the limits of zoom/digital communication

*Facilitator*

**Michael Bane**, Head of Americas Investor Relations & Senior Managing Director,  
**Ardian**

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

*Facilitator*

**Sora Monachino**, Managing Director,  
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

*Moderator*

**Mary Kate (MK) Flynn**, Editor-in-Chief, **PE Hub & PE Hub Europe**

*Keynotes*

- **Mary Armstrong**, Managing Director, Global Head of Marketing & Communications, **General Atlantic**
- **Jeffrey Kauth**, Managing Director, Global Public Affairs, **Blackstone**
- **Andrew Tirbeni**, Managing Director, Client Relations and Capital Raising, **EQT Group**

**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

*Moderator*

**Greg Kaufmann**, Director, **Gridline**

*Panelists*

- **Susan Stella**, Head of Investor Relations and Impact, **Activate Capital**
- **Sonja Weiss**, Manager, Investor Relations, **Instar Asset Management**
- **Drake Paulson**, VP of Customer Success and Partnerships, **Anduin**
- **Dan Sullivan**, Sales Executive for the Americas, **DiligenceVault**



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## 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?

### Moderator

**Mary E. Adams, CMP**, Founder & CEO, **Avivant Partners**

### 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**
- **Zach Russo**, Creative Director, **RF Studio53**

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**

### Facilitators

**Alli Murdoff**, Partner, Marketing, **Section Partners**

**Brian Anderson**, Senior Conference Producer, **Private Equity International**

1:30

Luncheon

2:30

End of conference



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Private Equity  
International

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