

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 Borrasc, 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
Rebeca 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
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, LLCP
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
Jillian Hazelton, Head of Marketing & Communications, Bregal Investments
Samantha Hewitt, Director, Investor Relations, Abbott Capital Management
Michael Hong, Partner,, Davis Polk & Wardwell



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Cara Hubbard, Managing Director, Wellington Management
July 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
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
Sarah Tomolonius, Partner, Head of Investor Relations, M13



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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
Jeff Williams, Chief Strategy Officer, Altvia
Ana Yoerg, Vice President, Marketing, At One Ventures

Agenda

Day 1: April 10, 2024

8:00 Registration – Continental Breakfast

8:15 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**
- **Samantha Hewitt**, Director, Investor Relations, **Abbott Capital Management**
- **Sarah Grenon**, Head of Marketing, North America, **Impax Asset Management**

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**
- **Jillian Hazelton**, Head of Marketing & Communications, **Bregal Investments**
- **Charlotte Morse**, Managing Director, Head of Investor Relations & Marketing, **Bridge Investment Group**

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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- **Natalya Michaels**, Managing Director, Head of Investor Relations, **Paine Schwartz Partners**
- **Rush Baker**, Partner, Head of Investor Relations, **Edison Partners**

9:00 **Breakfast Meetings End**

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 Borrach**, 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**
- **Jeff Williams**, Chief Strategy Officer, **Altvia**

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
- Counter potential backlash against ESG and DEI

Investor Engagement

Make impactful first impressions

- Key areas for standing out and thriving in this digital era



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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**

- Differentiating yourself through your story and brand
- Brand road mapping, website development, digital marketing, and data rooms

Moderator

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

Panelists

- **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 different 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, **Dasetti**

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**

8:40 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

- How IR execs can prepare for conversations around negative news with LPs

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
- Manage media and headline risk
- Forge partnership mentalities that endure times of stress
- Explore the limits of zoom/digital communication
- 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

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

Facilitator

Sarah Tomolonius, Partner, Head of Investor Relations, **M13**

Facilitator

Sora Monachino, Managing Director, Head of Investor Relations, **Victory Park Capital Advisors**

9:30 **Networking coffee break**

10:00 **Opening remarks**

Brian Anderson, Senior Conference Producer, **PEI Group**

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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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?

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

Participants in this session will share specific marketing tactics that they use to engage new investors. The two topic areas will be:

- **Fortify integrity and consistency of your brand**
- **Leverage digital communications and social media**

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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