



# Investor Relations Network

**An inclusive peer community for IR and marketing professionals  
from private markets**

## 2025-2026 Calendar

*\* topics, times and dates are subject to change*

### April 2025

#### **Virtual Presentation: 1Q Update on the State of Private Markets with PEI**

**Date:** April 24

**Format:** Virtual, Presentation

PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

### May 2025

#### **Supper Club: New York City**

**Date:** May 8, New York City

**Format:** In person; Dinner

Come join your fellow Investor Relations Network members for cocktails followed by a thought leadership roundtable on communicating with LPs

- Make your fund stand out through compelling storytelling
- How (and how much) they want to hear from you
- Put your best foot forward through your AGM, social media, reporting and more
- Communicating during GP-led secondary transaction, GP-stakes sales, or other firm-wide liquidity solutions

#### **AGMs that mean business**

**Date:** May 20

**Format:** Virtual; Meeting

- Tailored formats, timing, length and content to interests of LPs
- Enhancements that engage and facilitate interaction
- Lesson learned about tech, video and other key facets of an AGM
- Evaluations for YoY improvement and metrics for assessing efficacy toward goal



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# Investor Relations Network

June 2025

## Close the Deal with LPs

**Date:** June 10

**Format:** Virtual, Meeting

- What matters most to close the deal
- Building relationships beyond the initial meeting
- Becoming a trusted advisor
- Benefit from key lessons learned

## Executive Coaching Workshop: Reducing Friction Early Between Seniors and Juniors

**Date:** June 12

**Format:** Virtual; Workshop

Discuss best practices and common headaches when supervising, supporting, and working with younger team members. In this session, we will:

- Discuss the friction points in working practices between senior players (Boomers/Gen X) and junior players (Millennials/Gen Z), leveraging the room's observations and experience
- Identify what micromanagement is versus coaching and why some people always seem to feel micromanaged
- Leverage the interview, onboarding, or 1-1 meeting process to uncover how they work best, how they define micro-management, and what they believe is a fair and preferred way to communicate and negotiate on process, deliverables, deadlines, consequences, short-term goals, and rewards (the communicating and negotiating yours to them – including when it is appropriate to ask “Why?” versus just doing it)
- Introduce the benefits of “Reverse-Mentoring” to inter-generational relationships

## Executive Coaching Workshop: Building an Executive Presence Using Gravitas and Reading the Room

**Date:** June 17

**Format:** Virtual; Workshop

Learn how to build an executive presence during and outside of meetings. We will:

- Identify and discuss your Gravitas when entering a room and discuss ways to vary this depending on who is in the room, and what their needs are. We will look at gravitas needs from the perspective of investors, operators, and associates, and the challenges IR professionals face in meeting these needs
- Teach you how to monitor and be deliberate in your tone, body language, posture, placement, and verbal habits to maximize your executive presence, as well as introduce a tool called the PVA that can help measure your gravitas



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# Investor Relations Network



- Develop impression management awareness and skills while understanding the threats others bring in terms of their bias and perceptions

## Member Meeting: Boston

**Date:** June 18

**Format:** In Person

Join roundtable discussions on:

### Technology throughout the LP lifecycle

- Build brands and engage with investors
- Review various third-party solutions and service providers
- CRM best practices to manage investor relationships
- Technology's role in external and internal communications
- Harness AI to unleash potential

### AGMs that propel fundraising

- LP Communications before, during, and after
- Enhancements for engaging prospective LPs
- Compare objective-driven formats and content  
Tech, swag, and other key facets of an AGM
- Debriefing and leveraging feedback for YoY improvement

### Stories and metrics that matter

- Compare needs and mindsets of different stakeholders
- Convey a consistent story that accounts for stakeholders' nuances
- Omni channel engagement across websites and social channels
- Hone your story and/or brand to amplify your message
- What outcomes and metrics (i.e., IRR, DPI) resonate best

## Executive Coaching Workshop: Coaching One-on-One

**Date:** June 24

**Format:** Virtual; Workshop

Learn how to apply best practices to 1-1 coaching of direct reports. This can be challenging if we are not connected, lack a plan, don't know how to navigate their emotions, or we find ourselves lecturing followed by awkward silence. In this session, we will:

- Outline ways to increase the speed of connection, and the importance of monitoring and maintaining it throughout the conversation, along with identifying early on where they are now, and where they are headed as we introduce the GROW model
- Assess and adapt to their personality, their emotional state, and their need for a transactional or transformational coaching style, as well as monitoring your bias going into the conversation
- Apply best practices around how and when to question, empathize, and reciprocate via storytelling to improve outcomes

## Member Meeting: Chicago



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# Investor Relations Network



**Date:** June 25

**Format:** In Person

Join roundtable discussions on:

## **Technology throughout the LP lifecycle**

- Build brands and engage with investors
- Review various third-party solutions and service providers
- CRM best practices to manage investor relationships
- Technology's role in external and internal communications
- Harness AI to unleash potential

## **AGMs that propel fundraising**

- LP Communications before, during, and after
- Enhancements for engaging prospective LPs
- Compare objective-driven formats and content
- Tech, swag, and other key facets of an AGM
- Debriefing and leveraging feedback for YoY improvement

## **Stories and metrics that matter**

- Compare needs and mindsets of different stakeholders
- Convey a consistent story that accounts for stakeholders' nuances
- Omni channel engagement across website and social channels
- Hone your story and/or brand to amplify your message
- What outcomes and metrics (i.e., IRR, DPI) resonate best

## July 2025

### **How to Tap into the Family Office Market**

**Date:** July 22

**Format:** Virtual, Meeting

- Marketing strategies and tactics for the family office segment
- Crucial steps and resources to educate and attract family offices
- Trends in the market across family offices (flexibility, terms, etc.)

### **Virtual Presentation: 2Q Update on the State of Private Markets with PEI**

**Date:** July 24

**Format:** Virtual, Presentation

PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.



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## August 2025

### Fundraising Abroad

**Date:** August 15

**Format:** Virtual; Meeting

- Marketing strategies and tactics for attracting foreign investors
- Key trends in the international markets.)?
- Considerations for developing international relationships

## September 2025

### Crisis Communications

**Date:** September 11

**Format:** Virtual; Meeting

- Crisis communications frameworks to apply for your investor communications
- Managing your stakeholders when a crisis occurs
- Considerations for crisis communications (e.g., transparency, cadence, communication channels, one-way and two-way communications, etc.)

## October 2025

### What to Do When You're Not Fundraising

**Date:** October 9

**Format:** Virtual; Meeting

- Best practices for CRM, data management, and analytics/reports
- Managing your aggregated research while in pre-fundraise phase
- What you can do to 'always be fundraising' even when not officially in market

### Member Meeting: New York City

**Date:** October 23

**Format:** In person; Meeting

**Location:** NYC

Discuss how to maximize capital raising and marcomms through smarter technology and processes.

Discussion topics include:

- Supercharging your LP communications with AI & automation
- Fixing your CRM & investor portal headaches—for good
- AI, automation & data-driven fundraising—what's actually moving the needle



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## **Executive Coaching Workshop: Working with and Managing Different Personalities**

**Date:** October 28

**Format:** Virtual; Workshop

Learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will discuss:

- Breakdown the four categories by: imaginative talkers, detail workers, decision makers, peacekeepers, and additional combinations of work context personality
- Discuss which work personality causes finance professionals the most challenges
- Unpack hot buttons and motivational drivers for each category

## **Virtual Presentation: 3Q Update on the State of Private Markets with PEI**

**Date:** October 30

**Format:** Virtual, Presentation

PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

## **November 2025**

### **Executive Coaching Workshop: Changing Your Brand and Perceptions of You Over Time (Outside Your Organization)**

**Date:** November 6

**Format:** Virtual; Workshop

Learn how to develop your reputation outside your organization. To be thought of as a competent professional who cares about other's success. In this session, we will discuss:

- Common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list.
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation

### **How to Tap into the Insurance Market**

**Date:** November 13

**Format:** Virtual; Meeting



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# Investor Relations Network



- How insurance companies fit into the institutional investor space
- Trends we are seeing around insurance companies desire within private market investments (e.g., fund types, asset classes, geographies, co-investment, etc.)?
- The future of insurance companies as LPs.

## Executive Coaching Workshop: How to Lead When You Aren't the Expert in the Room

**Date:** November 19

**Format:** Virtual; Workshop

Learn how leaders can add value in team meetings, even when the topic isn't their expertise.

In this session, we will:

- Uncover the fears and beliefs managers have that lead to imposter syndrome, which often limits their questions and comments
- Discuss leader gravitas and its impact on energy and contributions of the team during meetings.
- Apply principles of leadership coaching in meetings when you aren't in charge, nor are the expert, to foster strategic group discussions and gain the respect of the room.

## December 2025

### Innovate your AGM

**Date:** December 9

**Format:** Virtual; Meeting

- Communications and productions tips for compelling LPs to attend in person
- Virtual, hybrid, and in-person events – what is everyone doing these days?
- Tools and tactics for productive and seamless events
- Pre- and post-event actions for optimizing engagement

### Virtual Presentation: PEI LP Perspectives

**Date:** December 16

**Format:** Virtual; Presentation

PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

## January 2026

### Executive Coaching Workshop: Strategic Communication for Leaders

**Format:** Virtual; Workshop

- Develop a compelling narrative under pressure
- Practice active listening and feedback control



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# Investor Relations Network



- Align communications with firm goals

## Choosing the Right CRM: What Actually Works for Private Funds

**Format:** Virtual; Meeting

- Peer-led discussion on CRM platforms (Salesforce, Affinity, Dynamo, etc.)
- Cost vs. functionality trade-offs
- How to drive internal adoption across teams

## February 2026

### Cost-Conscious Tech Stack Decisions: Doing More with Less

**Format:** Virtual; Meeting

- Prioritize tools that deliver measurable ROI
- Hear case studies from lean teams
- Strategies for consolidating platforms and vendors

## March 2026

### Executive Coaching Workshop: Leadership Communication Under Pressure

**Format:** Virtual; Workshop

- Navigating investor meetings in uncertain times
- Balancing transparency with confidence
- Dealing with internal and external communication stressors

### Marketing Metrics That Matter - Hear from the LP: What Are LPs Tracking and Why?

**Format:** Virtual; Meeting

- KPIs firms are using to track campaigns
- How to present results that resonate with leadership and LPs
- Tools and dashboards that help you measure what matters

## April 2026

### What to Do When You're Not Fundraising: Hear from the LP on Staying Top of Mind

**Format:** Virtual; Meeting

- How to keep LPs engaged between funds
- Tactics for elevating your visibility
- Ways to position for the next raise



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# Investor Relations Network



## May 2026

### **Executive Coaching Workshop: Stakeholder Management**

**Format:** Virtual; Workshop

- Balancing the needs of other teams
- Managing cross-functional influence
- Internal communication tips during fundraising

### **Investor Portals & Dashboards: What Tools Are Firms Using?**

**Format:** Virtual; Workshop

- Comparative look at tools (Allvue, Intralinks, Carta, etc.)
- Common implementation pitfalls
- Enhancing LP experience through portals

### **Supper Club: New York City**

**Format:** In person; Dinner

Come join your fellow Investor Relations Network members for cocktails followed by a thought leadership roundtable on tapping into new investor types.

## June 2026

### **Authentic Positioning: Telling Your Firm's Story with Credibility and Consistency**

**Format:** Virtual; Meeting

- Creating alignment between your narrative and values
- How to show—not sell—your firm's strengths
- Updates to websites and materials that reflect who you are

### **Member Meeting: Boston / Member Meeting: Chicago**

**Format:** In Person; Interactive roundtables and networking

Join roundtable discussions on tapping into new investor types, hear from LPs, and connect in a networking reception.

## July 2026

### **Executive Coaching Workshop: Managing Up, Across, and Out**

**Format:** Virtual; Workshop

- Building influence across departments and seniority levels
- Making the business case for technology initiatives
- Relationship-building strategies with external stakeholders



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## **Benchmarks that Matter to LPs: Hear from the LP**

**Format:** Virtual; Meeting

- What data LPs are requesting and why, what do they expect
- How to interpret and communicate performance benchmarks
- Making your reporting process more LP-friendly

## August 2026

### **How to Prep for the Next Raise: IR Systems, Data & Narratives**

**Format:** Virtual; Meeting

- Back-office alignment with fundraising readiness
- What marketing and materials to have ready
- Data audits, updates, and tracking in advance of launch

## September 2026

### **Executive Coaching Workshop: Executive Presence for In-Person & Virtual Engagements**

**Format:** Virtual; Workshop

- Enhancing personal presence in high-stakes settings
- Presentation and facilitation skills
- Managing energy and presence on-screen and in person

### **Building and Maintaining Strong LP Relationships Between Funds: Hear from the LP**

**Format:** Virtual; Meeting

- Tactics for proactive LP engagement year-round
- Leveraging transparency and regular updates
- Personalizing communications at scale

## October 2026

### **Communications Roundtable: Positioning Your Firm in a Down Market**

**Format:** Virtual; Meeting

- How leading firms are adjusting messaging
- Retooling your communications strategy without overhauling
- Strategies for staying relevant in a quieter fundraising market

### **Member Meeting: New York City**

**Format:** In person; Meeting

**Location:** NYC



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Discuss expanding capital channels in H2 and into 2027 in interactive panels, roundtable discussions, and a networking reception.

## November 2026

### **Executive Coaching Workshop: Influence & Negotiation**

**Format:** Virtual; Workshop

- Techniques for persuasive communication
- Handling objections or tough questions from GPs, LPs
- Strengthening your internal position

### **AGMS with real engagement and impact**

**Format:** Virtual; Meeting

- What are the trends in AGMs
- How do you engage your LPs at these events
- Designing AGMS for your investor demographics

## December 2026

### **Year-End Tools & Strategy Roundtable: Lessons Learned, Plans Ahead**

**Format:** Virtual; Presentation

- What worked this year: fundraising, tech, tactics, teams
- Planning for 2027 initiatives
- Peer sharing on tools, vendors, and workflows



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