

Investor Relations, Marketing & Communications Forum Europe 2023

Advisory board

Andrew Harris, Managing Director, Head of Investor Relations & ESG, **Tiger Infrastructure**

Danai Musandu, Vice President, Investor Relations, **HPE Growth**

Priya Nair, Senior Director, **abrdn**

Sarah Odds, Head of Client Services, **ATLAS Infrastructure**

Harriet Rae, Head of IR & ESG, **Pioneer Point Partners**

Philippe Taillardat, Head of Investor Relations, **RIVE Private Investment**

Speakers

Jonathan Aiach, Director, **Capman**

Seda Ambartsumian, Head of Marketing & Communications, **Target Global**

Annabel Arrowsmith, Senior Marketing Manager, Private Assets, **Schroders Capital**

Susann Aulbach, Investor Relations, **DN Capital**

Joel Beckman, Communications Lead, **University of Cambridge Investment Management**

Jenny Blinch, Global Head of Communications, **Partners Group**

Stephen Bradnam, Investor Relations Officer, **LeapFrog Investments**

Luke Burdess, Investor Relations Director, **Beechbrook Capital**

Gerald Carton, Partner, **Coller Capital**

Nicole Downer, Managing Partner, **MV Credit**

Keith Driver, Executive Director, **HRL Morrison & Co**

Emily Eban, Investor Relations Manager, **Moorfield Group**

Emanuel Eftimiu, Principal, Head of ESG, **Alpha Associates**



Nicolas Firzli, Director-General, **World Pensions Council (WPC)**
Natasha Franks, Head of Client Reporting, **Alpha Associates**
Cameron Grant, Principal, **Glendower Capital**
Jessica Greenhalgh, Marketing Communications Lead, **Montagu**
Stephan Grillmaier, Head of Investor Relations, **Arcus Infrastructure Partners**
Erika Gucfa, Managing Director, **North Sky Capital**
Carlota Fernandez de Leon, Head of Investor Relations, **SAIL Ventures**
Lucy Hall, Founder, **Skills of the future**
Andrew Harris, Managing Director, Head of Investor Relations & ESG, **Tiger Infrastructure**
Jillian Hazelton, Head of Marketing & Communications, **Bregal Investments**
Amber Hilkenne, Partner, Chief Growth Officer, **Stanley Capital**
Lydia Kalia, Director of Marketing & Communications, **Livingbridge**
Andrew Kenny, Head of EMEA Corporate Communications, **Carlyle**
Kristina Kuhnke, Partner & Head of Investor Relations, **RoundShield Partners**
Chloe Lavedrine, Managing Director, **Centerbridge Partners**
Mathias Lejeune, Senior Director, Infrastructure Solutions, EMEA, **CBRE Investment Management**
Domonique Lemonius, Research Manager, **PEI Group**
Sophie Littler, Specialist Sales Associate Director, **Fidelity International**
Daria Litvinova, Partner, Head of Investor Relations, **Vauban Infrastructure Partners**
Simon Males, Executive Director, **Tikehau Capital**
Ana Maria Harrison, Partner, **Adam Street Partners**
Craig McGlashan, Editor, **PE Hub Europe**
Carmela Mendoza, Senior Reporter, **Private Equity International**
Eleanor Miller, Investor Relations Principal, **Actis**
Danai Musandu, Vice President Investor Relations, **HPE Growth**
Priya Nair, Senior Director, **abrdn**
Megan Noelle Chew, Senior Vice President, **Eurazeo**



Sarah Odds, Head of Client Services, **ATLAS Infrastructure**
Charlotte O'Leary, Chief Executive Officer & Director, **Pensions For Purpose**
Yaw Peprah, Investor Relations Manager, **Goodwell Investments**
Henry Philipson, Marketing & Communications Director, **Beringea**
Joe Pigott, Managing Director, **Crestline Investors**
Liz Platt, Strategy Associate, **Climate Investment**
Kathryn Pothier, Investor Relations Partner, **Epiris**
Alexandra Prigent-Labeis, Managing Partner, **Accellency**
Harriet Rae, Head of IR and ESG, **Pioneer Point Partners**
Patrick Raffard, Partner, Head of Business Development, **Rivage Investment**
Grace Reyes, CEO & Founder, **The Investment Diversity Exchange (TIDE)**
Kimberly Romaine, Director, **Private Equity Communications**
Brad Ross-Williams, Head of Investor Relations, **CQS UK LLP**
Guillaume Rouault, EMEA Director - Business Development, **Diligence Vault**
Corinne Schreiber, Principal, Investor Relations, **Pantheon**
Ellinor Schrewelius, Director, Investor Relations, **Verdane**
Russell Sherman, Partner, **Prosek Partners**
James Smallridge, Director, **Soho Square**
Philippe Taillardat, Head of Investor Relations, **RIVE Private Investment**
David Thomas, Director, **GRESB**
John Thompson, Managing Partner, **Burway**
Claudia Urquiola, Head of Marketing & Communications, **Nauta Capital**
Lucia Villamor, Partner, Investor Relations, **Endless LLP**
Laura West, Head of Investor Relations, **CBPE Capital**

Agenda

Day 1 - Wednesday, September 27

8:00 AM Women-only breakfast

8:45 AM Introduction from PEI

Kitty Watson, Producer, **PEI Group**

8:50 AM Chairperson's welcome address

Danai Musandu, Vice President, Investor Relations, **HPE Growth**

9:00 AM Opening keynote: What are the current market trends and the impact on investor relations?

- How to navigate the pressure of ticket size reductions and decreasing pace in fundraising
- How to exploit the newfound transparency in communication between investors and GPs to deploy capital and make a positive contribution to their returns
- Exploring the proliferation of the diversification of strategies and products such as secondaries and co-investments

Moderator: **Emily Eban**, Investor Relations Manager, **Moorfield Group**

Speakers:

Daria Litvinova, Partner, Head of Investor Relations, **Vauban Infrastructure Partners**

Corinne Schreiber, Principal, Investor Relations, **Pantheon**

Ellinor Schrevelius, Director, Investor Relations, **Verdane**

Nicole Downer, Managing Partner, **MV Credit**

Keith Driver, Executive Director, **HRL Morrison & Co**

09:40 AM What differentiates your fund in a crowded market?

- Developing a unique value proposition and articulating this effectively
- The importance of maintaining brand consistency and alignment across the firm
- How marketing channels must adapt to the changing fundraising landscape

Moderator: **Russell Sherman**, Partner, **Prosek Partners**

Speakers:

Stephan Grillmaier, Head of Investor Relations, **Arcus Infrastructure Partners**

Amber Hilkene, Partner, Chief Growth Officer, **Stanley Capital**

Chloe Lavedrine, Managing Director, **Centerbridge Partners**

Priya Nair, Senior Director, **abrdn**

10:20 AM What are the necessary building blocks for a successful IR function?

- Fundraising, business development, client relationship – exploring the separation strategy between the three functions
- Keeping the IR function alive in times of distressed markets
- To what extent do GPs understand the value of structured IR function

Moderator: **Carmela Mendoza**, Senior Reporter, **Private Equity International**

Speakers:

Gerald Carton, Partner, **Coller Capital**

Eleanor Miller, Investor Relations Principal, **Actis**

Patrick Raffard, Partner, Head of Business Development, **Rivage Investment**

11:00 AM Networking break

11:30 AM Keynote interview: Digital marketing & social media: A Q&A session on evolving business communication

Moderator: **Danai Musandu**, Vice President Investor Relations, **HPE Growth**

Speaker: **Lucy Hall**, Founder, **Skills of the Future**

12:00 PM Panel debate: Going solo vs. outsourcing agents

- Using regional agents vs global mandates
- How to measure the value of placement agents against their fees
- When is it the right time to let go of a placement agency?

Moderator: **Philippe Taillardat**, Head of Investor Relations, **RIVE Private Investment**

Speakers:

Going solo - **Kristina Kuhnke**, Partner & Head of Investor Relations, **RoundShield Partners**

Outsourcing agents - **Laura West**, Head of Investor Relations, **CBPE Capital**

12:40 PM Working groups

<p>Working Group A Reporting: a one size fits all scenario?</p> <ul style="list-style-type: none">• How to have a streamline process for prospecting and due diligence• What are the limitations of ESG reporting?• Navigating big data requests and the integrity of data <p>Speakers: Harriet Rae, Head of IR and ESG, Pioneer Point Partners Natasha Franks, Head of Client Reporting, Alpha Associates</p>	<p>Working Group B The evolution of virtual relationships and investor communications</p> <ul style="list-style-type: none">• Finding the ideal blend of in-person and virtual communication with investors• Comparing AI and data analytics with human insight and personal interactions• Dissecting the extra layer outsourcing adds to the relationship management piece <p>Speaker: Ana Maria Harrison, Partner, Adam Street Partner</p>
<p>Working Group C How to successfully build a career in investor relations</p> <p><i>Hear from members of the Next Generation in Investor Relations Network.</i></p> <ul style="list-style-type: none">• How to stay aware of the rapidly changing requirements of investors• How to successfully transition from a junior to a mid-level IR professional	<p>Working Group D The evolution of the AGM</p> <ul style="list-style-type: none">• Content – addressing the changes in investor demands and expectations of the AGM• Structure – identifying the optimum style of the meeting; a series of meetings, road trip style and beyond

<p>Speakers:</p> <p>Stephen Bradnam, Investor Relations Officer, LeapFrog Investments</p> <p>Cameron Grant, Principal, Glendower Capital</p>	<ul style="list-style-type: none"> Connections – prioritising exposure at the meeting to the portfolio companies vs the management team <p>Speakers:</p> <p>Jillian Hazelton, Head of Marketing & Communications, Bregal Investments</p> <p>Megan Noelle Chew, Senior Vice President, Eurazeo</p>
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1:20 PM Lunch and networking break

2:30 PM Functional breakouts

<p>Stream A</p> <p>Investor relations, business development & client services</p>	<p>Stream B</p> <p>Marketing messaging & communications</p>
<p>2:30 PM How to build the optimum investor relations team</p> <ul style="list-style-type: none"> Identifying which skill sets are required and prioritised when building an IR team Finding the difference between hiring for business development and for client services Representation in fundraising - why we have more women in the role <p>Moderator: Luke Burdess, Investor Relations Director, Beechbrook Capital</p> <p>Speakers:</p> <p>Jonathan Aiach, Director, Capman</p> <p>Joe Pigott, Managing Director, Crestline Investors</p> <p>Kathryn Pothier, Investor Relations Partner, Epiris</p>	<p>2:30 PM How to effectively rebrand</p> <ul style="list-style-type: none"> Reasons why you might rebrand and when this could be appropriate Types of rebrand: name change, visual refresh, new website development etc Developing brand ambassadors and effecting change <p>Moderator: Kimberly Romaine, Director, Private Equity Communications</p> <p>Speakers:</p> <p>Jessica Greenhalgh, Marketing Communications Lead, Montagu</p> <p>Lydia Kalia, Director of Marketing & Communications, Livingbridge</p> <p>Claudia Urquiola, Head of Marketing & Communications, Nauta Capital</p>
<p>3:00 PM Tech tools and where to use them</p> <ul style="list-style-type: none"> The influence of technology on portfolio management, fund operations, deal origination, IR and fundraising Comparing reporting tools, CRM, RFP and marketing systems 	<p>3:00 PM How the marketing mix evolves with the democratisation of private assets</p> <ul style="list-style-type: none"> The current mix vs future mix The importance of a customer experience

<ul style="list-style-type: none"> The effect of increased competition for assets on driving firms to reassess their use of data and technology <p>Moderator: Guillaume Rouault, EMEA Director, Business Development, Diligence Vault</p> <p>Speaker: James Smallridge, Director, Soho Square Capital</p>	<ul style="list-style-type: none"> Identifying the changes and developments of the marketing function and the benefits of outsourcing <p>Moderator: Alexandra Prigent-Labeis, Managing Partner, Accellency</p> <p>Speakers: Seda Ambartsumian, Head of Marketing & Communications, Target Global Annabel Arrowsmith, Senior Marketing Manager, Private Assets, Schroders Capital Henry Philipson, Marketing & Communications Director, Beringea</p>
<p>3:30 PM A deep dive into client services</p> <ul style="list-style-type: none"> What is the best practise and how is it positioned within the organisation How the current climate reflects the change in resourcing for the client services function What are the operational challenges within client services within larger organisations? <p>Moderator: Carlota Fernandez de Leon, Head of Investor Relations, SAIL Ventures</p> <p>Speaker: Sarah Odds, Head of Client Services, ATLAS Infrastructure Brad Ross-Williams, Head of Investor Relations, CQS UK LLP</p>	<p>3:30 PM Challenging longstanding behaviours internally and externally</p> <ul style="list-style-type: none"> Highlighting the importance and role of senior buy-in on social media How to ensure your marketing message and communications are not blurred across asset classes Using social media as a way to connect with your target audience <p>Moderator: Sophie Littler, Specialist Sales Associate Director, Fidelity International</p> <p>Speakers: Andrew Kenny, Head of EMEA Corporate Communications, Carlyle Lucia Villamor, Partner, Investor Relations, Endless LLP Susann Aulbach, Investor Relations, DN Capital</p>

4:00 PM Networking break

4:40 PM Fireside chat: An expert perspective on the evolution of investor relations

Moderator: **Charlotte O'Leary**, Chief Executive Officer & Director, **Pensions For Purpose**

Speaker: **Simon Males**, Executive Director, **Tikehau Capital**

5:00 PM Audience roundtable discussions (Off the record)

- The democratisation of private equity - **Seda Ambartsumian**, Head of Marketing & Communications, **Target Global**
- The role of BCorp in private investments - **Henry Philipson**, Marketing & Communications Director, **Beringea**
- Tapping into new pools of capital and how to access or enter those markets eg. Asia, Middle East etc - **Lucia Villamor**, Partner, Investor Relations, **Endless LLP**

- Private wealth and family offices their role in fundraising specifically in the current market - **Susann Aulbach**, Investor Relations, **DN Capital**
- How to achieve work/life balance in a career in private equity - **Kathryn Pothier**, Investor Relations Partner, **Epiris**

5:45 PM Networking drinks reception

Day 2 - Thursday, September 28

8:15 AM Networking breakfast

9:15 AM Chairperson's welcome back address

9:20 AM Investor keynote panel: LP requirements under the microscope

- Navigating GP reluctance to disclose investment information
- How to navigate the impact of increasing interest rates on your private market portfolio
- How satisfied are investors with their GP's ESG performance

Moderator: **Craig McGlashan**, Editor, **PE Hub Europe**

Speakers:

Joel Beckman, Communications Lead, **University of Cambridge Investment Management**

Emanuel Eftimiu, Principal, Head of ESG, **Alpha Associates**

Nicolas Firzli, Director-General, **World Pensions Council (WPC)**

Grace Reyes, CEO & Founder, **The Investment Diversity Exchange (TIDE)**

10:00 AM Market update from Private Equity International

Speaker: **Domonique Lemonius**, Research Manager, **PEI Group**

10:20 AM Fireside chat: An expert perspective on the evolution of marketing & communications in private investment

Speakers:

Jenny Blinch, Global Head of Communications, **Partners Group**

John Thompson, Managing Partner, **Burway**

11:00 AM Networking break

11:30 AM How to weather the ESG data dilemma

- Identifying practical measures to deliver meaningful ESG data and reports
- How automated the ESG data-gathering process is
- Joining the dots between ESG and DEI

Moderator: **David Thomas**, Director, **GRESB**

Speakers:

Erika Gucfa, Managing Director, **North Sky Capital**

Andrew Harris, Managing Director, Head of Investor Relations & ESG, **Tiger Infrastructure**
Yaw Peprah, Investor Relations Manager, **Goodwell Investments**
Liz Platt, Strategy Associate, **Climate Investment**

12:10 PM Think tank sessions

Investor relations, marketing and communications in private equity Speaker: Jenny Blinch , Global Head of Communications, Partners Group	Investor relations, marketing and communications in real estate	Investor relations, marketing and communications in infrastructure Speaker: Mathias Lejeune , Senior Director, Infrastructure Solutions, EMEA, CBRE Investment Management	Investor relations, marketing and communications in private debt Speaker: Alexandra Prigent-Labeis , Managing Partner, Accellency
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13:10 PM Networking lunch

2:10 PM Close of conference