

Investor Relations Marketing & Communications Forum: Europe London 2022

The Investor Relations, Marketing & Communications Forum: Europe 2022

*Driving the evolution of Europe's private market fundraising and
communication community*

5-6 October, Grand Connaught Rooms, London

Day one: 5 October

08:45

**Chairperson's Welcome Address for the PEI Investor Relations, Marketing & Communications
Forum: Europe**

Danai Musandu, Senior Investor Relations Associate, **HPE Growth**

08:50

Keynote panel discussion: What LPs want from their private fund managers

- What kind of messaging and communication most appeals to LPs and catches attention in the current landscape?
- What information do investors need to see to make an informed decision?
- The importance of a tailored, quality customer service and communications throughout the relationship
- ESG – increasing demands for targets, data and transparency in private markets

Moderator: Drake Paulson, Managing Director, Nasdaq Private Fund Solutions, **Nasdaq**

Daria Litinova, Head of Investor Relations, **Vauban Infrastructure**

Amanda Tonsgaard, Head of Investor Services & Communication, **Triton Partners**

Richard Moore, Managing Director, **Campbell Lutyens**

09:30

Panel Discussion: The evolving investor relations role in private markets

- How is the investor relations role evolving and becoming more multi-faceted?
- Fundraising, product development, business intelligence, client service – which areas are the most fundamental at present for IR leaders?
- How will the increase in remote working and virtual meetings have a long-lasting impact on investor relations professionals?

Chloe Lavendrine, Managing Director, **Centerbridge Partners**

Joe Pigott, Managing Director, **Crestline Investors**

Amy Ward, Managing Director, **Blue Owl Capital**

Visit the [agenda page](#) for the latest updates.

For programme information contact James Hatwell james.hatwell@peimedia.com

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Catherine Badour, Head of Investor Relations, **Hollyport Capital**

10:10

Panel Discussion: IR, Comms and the ESG conundrum

- Real-time reporting frameworks – how will IR teams manage increasingly sophisticated client requests and expectations?
- Ensuring you steer clear of greenwashing in the business development, marketing and fundraising processes
- Engagement within the portfolio to ensure ESG targets are met
- Impact of margin ratchets, credit lines and other ESG-related innovations in private markets
- COP26 fallout and how this has focused LPs mindsets

Moderator: Dave Armon, CEO, **3BL Media**

Emily Collins, Head of Investor Relations, **Beechbrook Capital**

Henry Philipson, Director of Marketing & Communications, **Beringea**

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

Ellinor Schrewelius, Director, Investor Relations, **Verdane**

11:00

Networking break

11:30

Panel Discussion: Moving with the markets – how IR and comms must stay on top as we shift towards an increasingly holistic private asset landscape

- Assessing market trends – how traditional asset class silos are merging as private fund managers move towards a holistic private market offering
- Identifying whether LP behaviour in this regard – will they want blended strategies from one manager or diverse offerings from a range?
- What this means for fundraising, client service and more – will efforts be combined across the markets, or will product specialty remain? Is there room for a hybrid approach?
- Ensuring your marketing message and communications are not blurred across the asset classes

Georgina Ewels, Director, Client & Strategy Development, **Bridges Fund Management**

Amber Hilkené, Partner, Head of Investor Relations, **AnaCap Financial Partners**

Mat Pearce, Head of Investor Relations, **Kreos Capital**

Keith Driver, Executive Director, **H.R.L. Morrison & Co.**

12:15

Presentation: title to be confirmed

Madeleine Croucher, Consulting Director, Behavioural Science, **Ogilvy Consulting**

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12:50

Debate: Regional vs global approach

- Has the pandemic forced a re-think when it comes to accessing LPs in different regions?
- The case for and against using placement agents with regional expertise
- Tailoring your approach when considering cultures, laws and regulations

Ralph Guenther, Partner, Head of Investor Relations Continental Europe, **Pantheon Ventures**

Silvia Calvo Alcalá, Head of Alternative Sales, **Santander Asset Management**

Catherine Halford, Managing Director, Business Development, **Alantra**

Mathias Lejeune, Investor Relations Director, **Ancala Partners**

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

Martin Munte, Director, Investor Relations, **17 Capital**

13:30

Lunch and networking break

14:30

Functional breakouts

Stream A Investor Relations, Business Development & Client Service	Stream B Marketing Messaging and Communications
<p>14:30 Focusing the lens on fundraising</p> <ul style="list-style-type: none"> - Assessing the figures across the private markets - Holistic versus product specific approaches – finding the best fit for your firm and client base - Hybrid, virtual, in-person – considerations for finding the best fundraising formula moving forward <p>Alma Lawrie, Investor Relations Executive, Keyhaven Capital Partners Paul Mann, Director, Business Development, Arcmont Asset Management Hugh Walters, Vice President, Investor Relations, Park Square Capital</p>	<p>14:30 Definition and execution – assessing the mission of the modern-day marketing team</p> <ul style="list-style-type: none"> - What are the ultimate goals of a private markets marketing and comms team in 2022? - LP prospects, portfolios, current clients, general public – who is the audience and how can marketing teams cater for all across different channels? - Examining the concept of marketing as a revenue driver and the targets associated with this <p>David Creed, Communications Director, Tikehau Capital</p>

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	<p>Ally Chow, Managing Director, Global Head of Marketing, Chenavari Investment Managers Alexandra Walker, Director of Marketing & Communications, 17 Capital</p>
<p>15:00 Internal relations – striking a balance with the investment team</p> <ul style="list-style-type: none"> - How does the relationship between IR and the investment team manifest itself in different firms? - Ears to the ground – why IR plays a crucial role in product development - A two-way stream - ensuring there is best practice in place for feedback <p>Kristina Kuhnke, Director, Head of IR and ESG Committee, RoundShield Partners Tim Crowley, Investor Relations Director, Palatine Private Equity</p>	<p>15:00 Institutional campaigns in the digital era</p> <ul style="list-style-type: none"> - Marketing private funds globally, efficiently, and compliantly - The post-Covid review – how did funds embrace virtual events (internal and external) and what is their relationship with events now? - Embracing new digital tools and capabilities to enhance your campaigns - Balancing cost, resource, and expertise across different campaigns <p>Cheryle Dobbs, Head of Marketing & Communications, EMEA, PineBridge Investments Christopher Jeffery, General Manager, Palico</p>
<p>15:30 LP appetite and sentiment for impact investment in private markets</p> <ul style="list-style-type: none"> - What constitutes impact investment and what does not? - What type of investors are prioritising a developed and sophisticated impact investment approach? - Responding to typical investor queries - Best practice for maintaining optimal client service along the impact investment fund lifecycle <p>David Keel, Head of Client Solutions, Blue Earth Capital Carlota Fernandez de Leon Ortiz, Head of Investor Relations, SAIL Ventures Ashish Kumar, Climate & Innovation Lead, Shell Foundation</p>	<p>15:30 Communication and interaction – maintaining integrity and consistency across your marketing messaging</p> <ul style="list-style-type: none"> - Maintaining consistency across marketing collateral for different asset classes and markets - How to strengthen your brand and reputation with integrity through what you say as a business - Utilising video technology to enhance your story and captivate your audience - The importance of developing your team and speakers to ensure consistency across internal and external communications <p>Moderator: Kimberly Romaine, Director, Private Equity Communications Andrew Kenny, Head of EMEA Corporate Communications, Carlyle</p>

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Vidya Verlkumar, Head of Marketing & Communications, **IK Partners**
Melissa Cameron, Head of Marketing, Europe, **Advent International**

16:00

Networking break

16:30

Closing LP interview

Moderator: Tzvetе Doncheva, Investor Relations & Platform Manager, **PROPTech1**

17:00

Off the record - audience roundtable discussions over drinks:

- Utilising video marketing effectively in private assets
- Assessing developments and establishing best practice in public relations
- Examining the explosion of secondaries across the markets
- Investor reporting – finding the balance between automation and tailoring
- In-house vs outsourcing when it comes to legal and tech resource
- Responding to increasing popularity of co-investment strategies

17:45

Networking drinks reception

Day two: 19 May

08:45

Private think tanks – asset classes

IR, Marketing & Comms in private equity	IR, Marketing & Comms in private debt <i>Facilitated by Tavneet Bakshi</i> , Partner, Signal Capital Partners	IR, Marketing & Comms in infrastructure <i>Facilitated by Stephan Grillmaier</i> , Head of Investor Relations, Arcus Infrastructure Partners	IR, Marketing & Comms in real estate
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09:45

Opening presentation: The importance of strong leadership

- Why IR, marketing and comms needs strong, rounded leadership
- Overcoming the leadership and managerial challenges of 2022 and beyond
- Building and maintaining the right culture for your team and organisation
- How diversity amongst leadership can provide tangible benefits beyond box-ticking

10:15

Panel Discussion: The future of the AGM

- Considerations when planning AGMs and investor meetings in 2022 and beyond
- Physical, virtual, hybrid – getting the balance and technology right
- Content – how are investor priorities changing when it comes to what they want addressed at these meetings?
- How to coordinate a global remit and investor base

Laura West, Head of Investor Relations, **CBPE Capital**

11:00

Networking break

11:30

In-Focus Fireside Chat: Data flows and woes in the IR function

- What are the biggest data challenges at present for IR professionals and how are they being combated?
- Best practice for working with internal and external stakeholders to optimise data flows and quality
- Tips and tools when it comes to data visualisation

12:00

Panel Discussion: Utilising external platforms to maximise investor outreach

- How fintechs are transforming access to private markets
- Developing and maintaining partnerships with the platforms
- How embracing this can maximise your outreach to high-net worth, single family offices and other retail investors
- Will institutional investors increasingly turn towards these platforms for simple access?

Francisca Grol, Head of Research, **NewVest**

Nina Pfifer, Co-Founder & Chief External Affairs Officer, **Conduit Capital Partners**

Christopher Jeffery, General Manager, **Palico**

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12:40

Closing Interview: Inclusion and diversity in IR, marketing, and communications

- Inclusion before diversity – why you can't achieve diversity until you have a fully inclusive workplace
- Why and how diversity goes beyond the number of women in IR, marketing and communication roles
- Best practice for pushing the inclusion and diversity agenda internally and externally

13:00

Networking lunch

14:00

Close of conference