

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, **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: Daniel Schieferdecker, Sales Specialist Private Markets, **Nasdaq Private Fund Solutions**

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

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

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

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

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?

Moderator: JD David, Managing Director, **MJ Hudson**

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

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

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

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Joe Pigott, Managing Director, **Crestline Investors**
Amy Ward, Managing Director, **Blue Owl Capital**
Catherine Badour, Head of Investor Relations, **Hollyport Capital**
Brad Ross-Williams, Head of Investor Relations, **East Lodge 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**
Christian Dybdahl-Ovesen, Partner, **CORDET Capital Partners**

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

Moderator: Annabel Arrowsmith, Senior Marketing Manager, **Schroders**
Georgina Ewels, Director, Client & Strategy Development, **Bridges Fund Management**
Amber Hilkenne, Partner, Head of Investor Relations, **AnaCap Financial Partners**

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Mat Pearse, Head of Investor Relations, **Kreos Capital**
Keith Driver, Executive Director, **H.R.L. Morrison & Co.**
Michael Stromsoe, Head of Investor Relations, **HSBC Asset Management**

12:15

Presentation: Unseen Opportunities - Boost your marketing with Behavioural Science

An engaging out-of-industry session where you'll learn some of the key behavioural and psychological strategies you can apply to effectively engage with your audiences to drive business outcomes. We'll discuss specific case studies where Ogilvy has applied behavioural science to boost the effectiveness of a range of communication and marketing initiatives. Attendees will takeaway tangible strategies to apply within their own organisations.

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

12:40

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

Moderator: Carmela Mendoza, Senior Reporter, **Private Equity International**
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
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<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 Tom Maher, Managing Director, PATRIZIA</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>Moderator: Dave Armon, CEO, 3BL Media David Creed, Communications Director, Tikehau Capital 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 Guillaume Rouault, EMEA Director, Business Development, DiligenceVault Sophie Littler, Associate Director, Fundraising & Investor Relations, LendInvest Chris Davison, Partner, Permira Fiona Dane, Partner, Head of Investor Relations and Fundraising, Livingbridge</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 Omega Poole, Head of Capital Raising, LendInvest</p>
<p>15:30</p>	<p>15:30</p>

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LP appetite and sentiment for impact investment in private markets

- 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

Moderator: Selina Nalane, Client Director, **Old Mutual Alternative Investments**

Katie Manescu, Client Solutions Europe, **Blue Earth Capital**

Communication and interaction – maintaining integrity and consistency across your marketing messaging

- 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

Moderator: Kimberly Romaine, Director, **Private Equity Communications**

Andrew Kenny, Head of EMEA Corporate Communications, **Carlyle**

Vidya Verlkumar, Head of Marketing & Communications, **IK Partners**

Melissa Cameron, Head of Marketing, Europe, **Advent International**

16:00

Networking break

16:30

Closing interview: Getting under the skin of what truly drives marketing performance

Why is brand so critical for private market funds?

- How can you build a strong brand without Coca Cola's budget?
- How modern marketing techniques are revolutionising asset raising and investor management

Interviewer: Kimberly Romaine, Director, **Private Equity Communications**

Speaker: Jon Greene, Managing Director, **MJ Hudson**

17:00

Off the record - audience roundtable discussions over drinks:

- Utilising video marketing effectively in private assets

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Facilitated by **Christian Dybdahl-Ovesen**, Partner, **CORDET Capital Partners**

- Data flows and woes in the IR function
- Examining the explosion of secondaries across the markets

Facilitated by **Gerald Carton**, Partner, **Permira**

- Investor reporting – finding the balance between automation and tailoring

Facilitated by **Tom Maher**, Managing Director, **PATRIZIA**

- Assessing the democratisation of private assets

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

- Responding to increasing popularity of co-investment strategies

Facilitated by **Brad Ross-Williams**, Head of Investor Relations, **East Lodge Capital**

17:45

Networking drinks reception

Day two: 19 May

08:45

Private think tanks – asset classes

IR, Marketing & Comms in private equity <i>Facilitated by</i> Anamica Broetz , Head of Coverage & IR: Private Equity & Impact Investing, DWS	IR, Marketing & Comms in private debt <i>Facilitated by</i> Tavneet Bakshi , Partner, Signal Capital Partners	IR, Marketing & Comms in infrastructure <i>Facilitated by</i> Stephan Grillmaier , Head of Investor Relations, Arcus Infrastructure Partners	IR, Marketing & Comms in real estate <i>Facilitated by</i> Sophie Littler , Associate Director, Fundraising & Investor Relations, LendInvest
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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

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

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- 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

Moderator: Tzvetе Doncheva, International Investor Relations Lead, **PropTech1**

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

Lucia Villamor, Partner, Investor Relations, **Endless LLP**

Shane Swords, Managing Director – Head of Investor Relations, **NextEnergy 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

Moderator: George Emery, Principal, Non-US Investor Relations & Capital Raising, **Anthemis Group**

Sebastien Lecaudey, Senior Partner – Investor Relations, **Antin Infrastructure Partners**

Kristina Matthews, Managing Director, Head of Investor Relations & ESG, **Brightwood Capital**

Advisors

Gerald Carton, Partner, **Permira**

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

12:15

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?

Moderator: Peter Coates, Head of Business Strategy, **Peregrine Limited**

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

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

Christopher Jeffery, General Manager, **Palico**

Pascal Thomys, Investor Relations Associate, **Target Global**

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13:00

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

Interviewer: Tzveti Doncheva, International Investor Relations Lead, **PropTech1**

Speaker: Ana Maria Harrison, Partner, Investor Relations, **Adams Street Partners**

13:30

Networking lunch

14:30

Close of conference