

Investor Relations, Marketing & Communications Forum

Europe 2023

Advisory board

Andrew Harris, Head of ESG & Investor Relations, **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 and ESG, **Pioneer Point Partners**

Alex Simkin, Head of Client Services, **Park Square Capital**

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

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

Speakers

Jonathan Aiach, Director, **Capman**

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

Gerald Carton, Partner, **Coller Capital**

Harry Elliott, Vice President, **MV Credit**

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

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

Lydia Kalia, Director of Marketing & Communications, **Livingbridge**

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

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**

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

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

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

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

Alex Simkin, Head of Client Services, **Park Square Capital**

Merary Soto-Saunders, Global Head of Diversity, Equity & Inclusion, **CVC Capital Partners**

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

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



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

Speakers:

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

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

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

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

Speakers:

Priya Nair, Senior Director, **abrdn**

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

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

Speakers:

Gerald Carton, Partner, **Coller Capital**

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

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

Alex Simkin, Head of Client Services, **Park Square Capital**

11:00 AM Networking break

11:30 AM Industry-led presentation

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**

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>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>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>Speakers: Stephen Bradnam, Investor Relations Officer, LeapFrog Investments Harry Elliott, Vice President, MV Credit</p>	<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• Connections - prioritising exposure at the meeting to the portfolio companies vs the management team

1:20 PM Lunch and networking break

2:30 PM Functional breakouts

Stream A Investor relations, business development & client services	Stream B Marketing messaging & communications
<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>Speaker: Jonathan Aiach, Director, Capman</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>Speaker: Lydia Kalia, Director of Marketing & Communications, Livingbridge</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 The effect of increased competition for assets on driving firms to reassess their use of data and technology 	<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 Identifying the changes and developments of the marketing function and the benefits of outsourcing

<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>Speaker: Sarah Odds, Head of Client Services, ATLAS Infrastructure</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
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4:00 PM Networking break

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

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

- The most suitable disrupter tech platforms
- The democratisation of private equity
- The value of rich media
- The role of BCorp in private investments
- Tapping into new pools of capital and how to access or enter those markets e.g. Asia Middle East etc
- Private wealth and family offices their role in fundraising specifically in the current market

5:45 PM Networking drinks reception

Day 2 - Thursday, September 28

8:15 AM Working breakfast sessions (Off the record)

Room 1	Room 2
Investor relations, business development & client services	Marketing messaging & communications

9:15 AM Chairperson’s welcome back address

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

- Navigating LP 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

10:00 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

Speakers:

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

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

Merary Soto-Saunders, Global Head of Diversity, Equity & Inclusion, **CVC Capital Partners**

10:40 AM Fireside chat: An expert perspective on the evolution of marketing & communications in private investment

11:00 AM Networking break

11:40 AM Navigating the maze of external data platforms

- Discussing the digital opportunity within the capital raising ecosystem
- Exploring the integrity of data providers to enhance intelligence
- Identifying the security risks of digitalisation

12:20 PM Networking lunch

1:30 PM Think tank sessions

Investor relations, marketing and communications in private equity	Investor relations, marketing and communications in real estate	Investor relations, marketing and communications in infrastructure	Investor relations, marketing and communications in private debt
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2:30 PM Close of conference