

# Investor Relations, Marketing & Communications Forum San Francisco 2022

September 7-8  
JW Marriott San Francisco Union Square

## Agenda

### Day 1 - Wednesday, September 7

#### 8:30 am Breakfast meetings

- A. Structuring and streamlining the in-house marketing team  
**Facilitator:** **Annie Caucci**, Director of Marketing, **NewSpring**
- B. Building IR careers in VC: Navigating the dynamic VC asset class as an IR professional  
**Facilitator:** **Amrita Mainthia**, VP, Investor Relations, **General Catalyst**

#### 9:45 am Opening remarks

#### 9:50 am Chairperson's remark

#### 10:00 am Today's fundraising landscape and 2023 outlook

- Challenges on the horizon
- Differentiation strategies to set your firm apart
- LP communications
- Raising capital in-person vs. online
- Adapting to the current environment and pivoting your strategy

**Moderator:** **Michael Hong**, Partner, **Davis Polk**

#### 10:40 am Enhancing and communicating your ESG program

- Keeping up with investor expectations
- Incorporating ESG into your narrative
- ESG-related disclosures
- Addressing social issues and positioning your communication accordingly
- Identifying and avoiding greenwashing



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### **Speakers:**

**Andy Caine**, Partner, Human Capital, **Frazier Healthcare Partners**

**Ivan Massonnat**, Partner, **PAI Partners**

**Ravali Parsa**, Director of Investor Relations, **Aurora Capital Partners**

### **11:20 am Networking break**

### **11:50 am Keynote interview**

**Moderator: David Wells**, Partner, **Prosek**

**Speaker: Eileen Mancera**, Managing Director, **Post Advisory Group**

### **12:15 pm Investor insight: LP considerations when raising capital**

- Investor expectations
- Investor appetite and allocation in 2022/2023
- LP/GP communication dos and don'ts
- LPAC best practices
- Conveying company culture and values to LPs

### **Speakers:**

**Gerald Carton**, Partner, **Coller Capital**

**Ralph DeBernardo**, Partner & Head of Investor Relations, **Sapphire Ventures**

### **1:00 pm Networking luncheon**

### **1:50 pm Breakout session A**

#### **Track 1: Refreshing your brand and narrative**

- Conveying your unique story
- Creating a consistent and transparent message
- Standing out in a competitive market
- Embracing new technology
- Website and social media dos and don'ts

**Speaker: Annis Steiner**, Principal, Marketing & Communications, **FTV Capital**

#### **Track 2: The role of IR in the VC space**

- VC fundraising solutions to capture capital
- Tailoring your message and targeting your audience
- Pivoting amid unexpected challenges



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- LPAC best practices
- Addressing ESG in your portfolio companies

### **2:45 pm Breakout session B**

#### **Track 3: Communication strategies to develop and protect your relationships**

- Communication dos and don'ts
- Messaging fundamentals
- Crisis messaging
- Utilizing new technology and subscription models
- How tech and data can evaluate and monitor your LP relationships

**Speaker:** **Jimmy Carrion**, Senior Vice President, Investor Relations, **Lloyd Jones**

#### **Track 4: Diversifying your investor base**

- Adaptive methods to keep investors engaged
- Techniques to earn trust and loyalty when working with new LPs
- Positioning innovative investment strategies
- Working with placement agents

### **3:30 pm Networking break**

#### **4:00 pm Roundtable workshops**

1. Collaborating with stakeholders
  2. Top tips for the perfect DDQ
- Facilitator:** **Stacey Leanos**, Director of Investor Relations, **ACME Capital**
3. Crafting your story to better your pitch
  4. Press relations: Friend or foe?
  5. Leveraging VC to drive innovation

### **5:15 pm Cocktail reception**

## **Day 2 - Thursday, September 8**

### **9:30 am Opening remarks**

### **9:40 am Keynote address**



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### 10:05 am Diversity and equity as a business imperative

- Addressing what changes are necessary to reflect real progress
- DEI benchmarks and metrics
- Providing transparency to investors on your DEI initiatives
- Integrating DEI into your investment decisions
- Understanding the clear and explicit demands from investors

### 10:45 am Networking & refreshments

### 11:15 am The AGM: Trends and takeaways to engage and update your LPs

- Preparing for your annual meeting season
- Investor engagement and interactive solutions
- Benefits, concerns, and considerations
- Tips and techniques for emerging GPs
- Continuing the virtual/live hybrid; will it continue, or is there a trend for more face time?

#### Speakers:

**Karen Derr Gilbert**, Partner, **FTV Capital**

**Amrita Mainthia**, VP, Investor Relations, **General Catalyst**

### 12:00 pm IR when you're not actively fundraising: Setting the table

- Building credibility in the market
- Conveying your firm's operations and business model
- Techniques on staying involved with your investors: how much do they want to hear from you?
- Communicating with/servicing potential investors
- Critical relationship management

#### Speakers:

**Christina Anzel**, Director of Investor Relations & ESG, **True Green Capital Management**

**Stacey Monteiro Leanos**, Director of Investor Relations, **ACME Capital**

**Jennifer Tedesko**, Managing Director, **Campbell Lutyens**

### 12:45 pm Closing luncheon



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