

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

Facilitators:

Annie Caucci, Director of Marketing, **NewSpring Capital**
Lindsay DeLarme, Managing Director, Head of Corporate Communications & Branding,
Oaktree Capital Management

B. Building IR careers in VC: Navigating the dynamic VC asset class as an IR professional

Facilitators:

Gina Bauman, Head of Capital Formation, **Cota Capital**
Heather Judd, Head of Investor Relations, **CRV**
Amrita Mainthia, VP, Investor Relations, **General Catalyst**
Arash Rebek, Partner, Capital Formation, **Khosla Ventures**
Ashton Rosin, Operating Partner and the Head of Capital Formation, **Lowercarbon Capital**

8:30 am Welcome breakfast

9:45 am Opening remarks (Speaker: **Seth Kerker**, Director of Events, Americas, **PEI Media**)

9:55 am Chairperson's welcome (Speaker: **Yale Deskins**, Conference Producer, **PEI Media**)

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



To learn more, visit: peievents.com/en/event/irmc-sf/

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

Speakers:

Gina Bauman, Head of Capital Formation, **Cota Capital**

Allyson Kaufman, Head of Investor Relations, **DCVC**

Kathryn Pothier, Head of Investor Relations, **Trive Capital**

Maryling Yu, Chief Marketing Officer, **Backstop Solutions**

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

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

Speakers:

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

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

Mandira Reddy, Director for Impact and Investment, **Capricorn Investment Group**

11:20 am Networking break

11:50 am Fireside chat: Marketing to stand out in the fundraising crowd

- Identifying and highlighting your firm's differentiators
- Communicating your value proposition
- Crafting tailored messages that will resonate
- Leveraging digital tools

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

Interviewer: **David Wells**, Partner, **Prosek**

12:20 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

Moderator: **Jason Jerista**, Managing Director, Investor Relations, **LLR Partners**

Speakers:

Vishnu Amble, Director, **Green Bear Group**

Karen Bommart, Head of Investor Relations, **Battery Ventures**

Ben Challengren, Vice President, **Top Tier Capital Partners**

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



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1:00 pm Networking luncheon

2:00 pm 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

Moderator: **Joe Worden**, Founder & President, **5150 Digital Marketing Group**

Speakers:

Annie Caucci, Director of Marketing, **NewSpring Capital**

Lindsay DeLarme, Managing Director, Head of Corporate Communications & Branding, **Oaktree Capital Management**

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

Wayne Wu, General Partner, **VMG Partners**

2:45 pm 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

Moderator: **Devin Banerjee**, Editor at Large, Business & Finance, **LinkedIn**

Speakers:

Luke Barrett, Managing Director, Global External Affairs, **TPG**

Stephanie Bednar, Director of Investor Relations & Marketing, **Gryphon Investors**

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

Katie Kelly, Associate, **Top Tier Capital Partners**

3:30 pm Networking break

4:00 pm Roundtable workshops

1. Top tips for the perfect DDQ

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

2. Crafting your story to better your pitch

Facilitator: **Peter Delevett**, Director of Communications and Marketing, **National Grid Partners**

3. Press relations: Friend or foe?

Facilitator: **Scott Sutton**, Vice President, Americas Communications, **LaSalle Investment Management**

5:15 pm Cocktail reception



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Day 2 - Thursday, September 8

8:30 am Networking breakfast

9:30 am **Opening remarks** (Speaker: **Seth Kerker**, Director of Events, Americas, **PEI Media**)

9:40 am LP Fireside chat

Interviewee: **Marlene Timberlake D'Adamo**, Chief Diversity, Equity & Inclusion Officer, **CalPERS**

Interviewer: **Lawrence Aragon**, West Coast Bureau Chief, **PEI Media**

10:05 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?

Moderator: **Stephanie Bednar**, Director of Investor Relations & Marketing, **Gryphon Investors**

Speakers:

Karen Bommart, Head of Investor Relations, **Battery Ventures**

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

Tyler Griffith, Managing Director, Investor Relations, **Thomas H. Lee Partners**

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

11:05 am Networking & refreshments

11:35 am **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 investors: how much do they want to hear from you?
- Communicating with/servicing potential investors
- Critical relationship management

Moderator: **Brian Bank**, Strategy & Client Development, Investment Funds Group, **Kirkland & Ellis**

Speakers:

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

Devin Banerjee, Editor at Large, Business & Finance, **LinkedIn**

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

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

12:30 pm Closing luncheon