

Investor Relations, Marketing & Communications Forum San Francisco 2023

September 20-21
Parc 55 San Francisco

Investor Relations, Marketing & Communications Forum

2023 Agenda

Confirmed Speakers

Keynote Speaker

Sue Kwon, Vice President of Brand & Communications, **General Catalyst**

Speakers

Jeremy Bergman, Partner, Head of Product Management and Investor Relations, Private Equity, **Ares Management**

Tiffany Davis, Director, **Sofinnova Investments**

Laura Deitz, Investor Relations Principal, **Northgate**

Kathlika Fontes, Director of Investor Relations, **Grain Management**

Kelly Golden, Director of Investor Relations, **G2 Venture Partners**

Amanda Heravi, Head of Investor Relations & Director of ESG, **Avista Capital Partners**

Kelly Howard, Partner, Head of Marketing, **Adams Street Partners**

Jennifer Janson, Director of Communications, **OMERS Ventures**

Kimberley Kasper, Chief Marketing Officer, **Strattam Capital**

Tracie Kelly, Director of Marketing, **Excellere Partners**

Megan Lundy, Managing Director, Investor Relations, **Audax Private Equity**

Sarah Mattina, Marketing & Communications Director, **Venture Forward**

Cindy Mesaros, Head of Marketing and People, **Foresite Capital**

Amy Nelson, Chief Strategy Officer, **Rethink Capital Partners**

Allan Petersen, Managing Director, Investor Relations, **Nautic Partners**

Kathryn Pothier, Investor Relations Partner, **Epiris LLP**

Katie Riester, Partner, **Felicis Ventures**

Meghan Reynolds, Partner, Capital Formation, **Altimeter**

Gretchen Robinson, Director, Capital Formation, **GI Partners**

Olga Serhiyevich, Head of Investor Relations, **Village Global**

Alycia Simons, Manager of Investor Relations, **Mercato Partners**

Charlotte Shropshire, Head of Investor Relations, **Menlo Ventures**

Evan Teiger, Partner, **Foundation Capital**

Hillá Watkins, Chief Marketing Officer, **Scale Venture Partners**

Day 1: September 20, 2023

8:00 Registration – Continental Breakfast

8:15 Pre-conference breakfast meetings



For program information:
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Meeting A

The new politics of private investing

- How will the upcoming 2024 election impact private investing?
- What are the practical implications for investor relations, marketing & communications teams?
- What new pressures will fund managers face in a more democratized private investment sector?

Meeting B (Invite-only)

9:00 **Opening remarks & chair's welcome**

09:15 **Keynote panel: Real-time crisis communications**

- What lessons can investor relations leaders learn from events like the Silicon Valley Bank collapse? Can fund managers take on potential crises proactively?
- What is the role of your firm's brand in crisis communications, and can fund managers take on potential crises proactively through their brands?
- When it comes to public relations and communications with your investor base, what does transparency mean for your firm?

Moderator:

Susan Kwon, Partner, Marketing & Communications, **General Catalyst**

10:00 **New investor personae - non-traditional investors**

- Who are the non-traditional investors making an impact in managers' fundraising strategies, and what motivates them?
- How do you define your ideal investor personae for your firm?
- What are the common themes across different non-traditional investor personae, and how can you use those themes in your branding and communications strategies effectively & successfully?

Speakers:

Evan Tiger, Partner, Investor Relations, **Foundation Capital**

Olga Serhiyevich, Head of Investor Relations, **Village Global**

10:50 **Networking break**

11:20 **Designing your investor experience – Content, AGM and beyond?**

- How will the "democratization" of private investing shape the investor experience, from prospect to AGM?
- What are the types of content and content strategies that engage your investor base?



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- How do you leverage your firm's brand, and the personal brands of your firm's leadership, to design and plan a meaningful and effective AGM?

Speakers:

Alycia Simons, Manager of Investor Relations, **Mercato Partners**

12:10

Networking luncheon

1:10

Careers in investor relations, marketing & communications in the private investment industry

- How can private investment firms tap non-traditional talent pools to advance their fundraising, branding, and communications goals?
- What are the skillsets and competencies most sought after in today's private IR and marcomms departments?
- Where are the most exciting opportunities for professional growth in IR and marcomms in the private investment industry?

Speakers:

Kathlika Fontes, Director of Investor Relations, **Grain Management**

Megan Lundy, Managing Director, Investor Relations, **Audax Private Equity**

Cindy Mesaros, Head of Marketing and People, **Foresite Capital**

2:00

Fundraising Think tanks I (GP-Only)

Think tank A

Venture Capital

- How are venture capital firms faring in today's competitive fundraising landscape?

Think tank B

Growth Equity

- How are growth equity firms faring in today's competitive fundraising landscape?

Think tank C

Middle-Market Buyout

- How are middle market buyout firms faring in today's competitive fundraising landscape?

3:00

Networking refreshment break

3:30

Breakout Session: Marketing & Communications

Rebrand Strategies

- Considering the when and the why of a corporate rebrand
- Identifying the most impactful changes
- Internal communication and getting firmwide buy-in
- Ensuring a seamless rollout across all channels

Speakers:

Charlotte Shropshire, Head of Investor Relations

Menlo Ventures

Breakout Session: Investor Relations

Adapting to the current fundraising environment

- What is the current landscape like?
- Accelerated pace of capital deployment and fundraising
- Increased demands on reporting
- Extreme competition
- What areas of the fundraising process are you being forced to evolve/adapt?

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Amy Nelson, Chief Strategy Officer, **Rethink Capital Partners**
Hillá Watkins, Chief Marketing Officer, **Scale Venture Partners**

Kelly Howard, Partner, Head of Marketing, **Adams Street Partners**

Meghan Reynolds, Partner, **Capital Formation, Altimeter**

Allan Petersen, Managing Director, **Investor Relations, Nautic Partners**

4:25 Scaling up your IR & marketing and communications tech stack

- How do you assess your firm's IR & marcomms technology needs?
- How do you assess the capabilities of various tools and professionals to create a plan to scale up your tech stack (on a budget)?
- How do you get buy-in from your firm's leadership?

Speakers:

Sarah Mattina, Marketing & Communications Director, Venture Forward

5:15 Cocktail reception and end of day one

Day 2: September 21, 2023

8:00 Continental Breakfast

8:00 Pre-conference breakfast meetings

Meeting A

Will AI impact fundraising in private markets?

- Sharing of ideas and use cases for AI tools

Meeting B (Invite-only)

8:45 Think tanks II



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Think tank A

Marketing & communications

- What are the unique challenges faces by marketing & communications professionals working in the private investment industry today, and what are the solutions your peers are finding to be most effective in overcoming those challenges?

Think tank B

Investor relations

- How is the role of investor relations changing in a highly competitive fundraising environment?

9:30 Chair opening remarks

9:40 Keynote Interview: Global private market forecast: 2023 – 2024

- How is capital flowing around the globe?
- Where are the hot spots in the private markets today?
- Where are the potential hot spots in the private markets tomorrow?

10:30 Networking coffee break

11:00 Breakout Session: How to define and measure IR success

- What KPIs are you tracking?
- Does your CRM help track whether specific investors have switched firms or funds?
- Conducting investor studies/surveys
- How to continue building on success extend your fundraising footprint

Speakers:

Kelly Golden, Director of Investor Relations, G2
Venture Partners

Breakout Session: Future-proofed ESG & DEI

- In states where ESG and DEI investing have become politicized, how can your firm's branding reflect a non-political, "dollars and sense" approach to these concepts?
- How do you work with your firm's management to establish who "owns" ESG & DEI and how can this be reflected in your firm's branding?
- How do you plan for the next ESG or DEI-related crisis?

Speakers:

Amanda Heravi, Managing Director, Investor Relations & ESG, Avista Capital Partners

12:00 Luncheon



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Private Equity Customer Engagement Workshop

1:00 **Opening remarks**

1:10 **Private equity customer engagement: making the right first impression**

- What is private equity customer engagement?
 - Managing its customers' expectations through digital, mobile and social experiences.
 - Being proactive in telling your own story
- Why is customer engagement becoming a top priority?
- Key areas of focus for standing out and thriving in this digital era
 - Brand road mapping, website development and digital marketing, data visualization, and presentation and sales collateral design

Roundtable 1: Brand road mapping

- How to identify investor targets - who are they, and what do they want?
- How to manage multiple stories for multiple investor types
- Content marketing for private investors

Facilitators:

Jennifer Janson, Director of Communications, **OMERS Ventures**

Roundtable 2: Designing compelling and compliant marketing materials, reports, and data visualizations

- What makes a piece of marketing collateral in the private investment industry compliant with the SEC Marketing rule?
- The SEC Marketing rule - undertaking the task of educating your investors on how to read and interpret SEC Marketing rule compliant reports (e.g., gross vs. net profits in portfolio performance reporting)
- Tools and techniques for data visualization: data collection, analysis, distribution

Facilitators:

Tracie Kelly, Director of Marketing, **Excellere Partners**

Roundtable 3: Using technology to prospect, attract and retain investors

- CRM best practices to manage investor relationships
- Using social media platforms and tools to attract, retain, and cultivate new investor relationships
- Using data to identify new prospects

Roundtable 4: Producing your next AGM



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- In-person, digital, or hybrid event production strategies? How do you get the right mix of strategies for your AGM?
- Agenda design and writing
- Event vendor management and tool selection

Facilitators:

Katie Riester, Partner, **Felicis Ventures**

2:00 – 3:00 Rotations 1 - 2

3:00 – 3:20 **Networking break**

3:20 – 4:20 Rotations 3 - 4

4:20 **Marketing and branding for deal flow**

- What motivates founders today and how to increase your firm's deal flow
- How to leverage your firm's brand to draw in founders to your portfolio?
- How to design the founder experience as an expression of your firm's brand?

Speakers:

Kimberley Kasper, Chief Marketing Officer, **Strattam Capital**

5:00 **End of workshop**



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