

# 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**  
**Mark Barnhill**, Partner, **Platinum Equity**

### Speakers

**Sarah Abboud**, Director of Marketing & Communications, **VMG Partners**  
**Mary Adams**, **CMP**, Founder & CEO, **Avivant Partners**  
**Lawrence Aragon**, West Coast Bureau Chief, **PEI**  
**Devin Banerjee**, Sr. Managing Editor, Industry News & Community, **LinkedIn**  
**Gina Bauman**, Head of Capital Formation, **Cota Capital**  
**Ira Berg**, Managing Director, Business Consulting & Advisory Services, **Ext Marketing**  
**Jimmy Carrion**, Senior Vice President, Investor Relations, **Lloyd Jones**  
**Michelle Chao**, Head of Investor Relations, **Bertram Capital**  
**Catherine Chen**, Vice President, Investor Relations, **FFL Partners**  
**Andrea Chrysanthou**, Vice President, **TAS**  
**Nick Condie**, Senior Account Executive, **SS&C Intralinks**  
**Shernaz Daver**, Operating Partner and CMO, **Khosla Ventures**  
**Tiffany Davis**, Head of Investor Relations, **Sofinnova Investments**  
**Laura Deitz**, Investor Relations Principal, **Northgate**  
**Peter Delevett**, Director of Communications, **National Grid Partners**  
**Chelsea Dodge**, Director of Investor Relations, **Fin Capital**  
**Laura Fahrney**, Partner, Investor Relations, **Ridgemont Equity Partners**  
**Tim Flannery**, Co-founder and CEO, **Passthrough**  
**Kathlika Fontes**, Director of Investor Relations, **Grain Management**  
**Anne Gherini**, CMO, **Sierra Ventures**  
**Kelly Golden**, Director of Investor Relations, **G2 Venture Partners**  
**Lindsay Grider**, Global Head of Fundraising and Investor Relations, **Levine Leichtman Capital Partners**  
**Zoe Guttendorf**, Head of Marketing and Investor Relations, **Artis Ventures**  
**Nadia Hadi**, Principal, Partner Coverage, **Fifth Wall**  
**Karen Heidelberger**, Partner, Chief Partnership and Communications Officer, **Deerfield Management**  
**Jessica Hoffman Brennan**, Partner, Head of Strategy & Investor Relations, **Kohlberg & Company**  
**Jon Hoffman**, Managing Director, Investor Relations, **Rhône Group**  
**Amy Holmes**, Senior Vice President, Marketing and Communications, **Fengate Asset Management**  
**Jennifer Janson**, Director of Communications, **OMERS Ventures**  
**Jason Jerista**, Managing Director, Investor Relations, **LLR**  
**Kimberley Kasper**, Chief Marketing Officer, **Strattam Capital**  
**Nancy Katz**, Senior Director of Investor Relations, **Costanoa Ventures**  
**Rob Kaufman**, Head of Investor Relations, **Linse Capital**  
**Tracie Kelly**, Director of Marketing, **Excellere Partners**  
**Grace Kim**, Managing Director, Fundraising and Investor Relations, **The Riverside Company**  
**Brian Kriebel**, Managing Director, **HighBar Partners**



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**Kelly Lassing**, Head of Marketing and Communications, **Energize Capital**  
**Hye Kyung (HK) Lee**, Chief Strategy Officer, **InvestorFlow**  
**Debbie Liao**, Partner, Investor Relations, **Battery Ventures**  
**Matt Lien**, Director, Investor Relations, **Longwater Opportunities**  
**Tanya Loh**, Chief Marketing Officer, **Forgepoint Capital**  
**Amrita Mainthia**, Vice President, Investor Relations, **General Catalyst**  
**Mike Marderosian**, Vice President, **50 South Capital**  
**Sarah Mattina**, former Marketing & Communications Director, **Venture Forward**  
**Cindy Mesaros**, Head of Marketing and People, **Foresite Capital**  
**Oren Michaely**, Director of AI, **Motive Partners**  
**Jeff Mills**, Managing Director, Fundraising and Investor Relations, **Gryphon Investors**  
**Ryan Parker**, Chief Marketing Officer, **Trivest Partners**  
**Lisa Parks**, Head of Investor Relations, **Base Capital**  
**Allan Petersen**, Managing Director, Investor Relations, **Nautic Partners**  
**Tom Pierce**, Partner, CFO, CCO, **Sorenson Capital**  
**Chelsea Reichard**, Vice President, Fundraising, **Bow River Capital**  
**Katie Riester**, Partner, **Felicis Ventures**  
**Gretchen Robinson**, Director, Capital Formation-Business Development, **GI Partners**  
**Jessica Schmitt**, Director, Investor Relations, **Arrowroot Capital Partners**  
**Olga Serhiyevich**, Head of Investor Relations, **Village Global**  
**Alycia Simons**, Manager of Investor Relations, **Mercato Partners**  
**Soo Song**, Head of Marketing, **WiL Capital (World Innovation Lab)**  
**Ann Lee Steinberg**, Head of Investor Relations, **NFX**  
**Annis Steiner**, Principal, Marketing, **FTV Capital**  
**Jennifer Stroud**, EVP, Bay Area Head, Financial Communications and Capital Markets, **Edelman**  
**Jamie Viggiano**, Chief Marketing Officer, **Fuel Capital**  
**Hillá Watkins**, Chief Marketing Officer, **Scale Venture Partners**  
**Hadley Wilkins**, VP, Communications, **Atomic**  
**Avery Williams**, Head of Investor Relations & Marketing, **Healthquest Capital**  
**Jeff Williams**, Chief Strategy Officer, **Altvia**  
**Natalie Yates**, Head of Business Development and Investor Relations, **Vance Street Capital**

**Day 1:** September 20, 2023

**8:00** Registration – Continental Breakfast

**8:15** Pre-conference breakfast meeting

## The new politics and changes for private investing

- How will last month's new rules and amendments from the SEC change LP relations?
- How might the world of private investing change over the next two years?
- What are the practical implications of politics to investor relations, marketing & communications teams?

### Moderator:

**Jeff Mills**, Managing Director, Fundraising and Investor Relations, **Gryphon Investors**

### Panelists

**Tom Pierce**, Partner, CFO, CCO, **Sorenson Capital**

**Rob Kaufman**, Head of Investor Relations, **Linse Capital**



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

**Tiffany Davis**, Head of Investor Relations, **Sofinnova Investments**

**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**

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

**Panelist**

**Lawrence Aragon**, West Coast Bureau Chief, PEI

**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?

**Moderator**

**Jennifer Stroud**, EVP, Bay Area Head, Financial Communications and Capital Markets, **Edelman**

**Panelists**

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

**Ann Lee Steinberg**, Head of Investor Relations, **NFX**

**Karen Heidelberger**, Partner, Chief Partnership and Communications Officer, **Deerfield Management**

**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?
- 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?



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## Moderator

**Tim Flannery**, Co-founder and CEO, **Passthrough**

## Panelists

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

**Chelsea Dodge**, Director of Investor Relations, **Fin Capital**

**Mary Adams, CMP**, Founder & CEO, **Avivant Partners**

**Amy Holmes**, Senior Vice President, Marketing and Communications, **Fengate Asset Management**

**12:10**

## Networking luncheon

**1:10**

## Careers in investor relations, marketing and 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?

## Moderator

**Sarah Abboud**, Director of Marketing & Communications, **VMG Partners**

## Panelists

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

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

**Andrea Chrysanthou**, Vice President, **TAS**

**Gretchen Robinson**, Director, Capital Formation-Business Development, **GI Partners**

**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?

**Debbie Liao**, Partner, Investor Relations, **Battery Ventures**

### Think tank B

#### Growth Equity

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

**Jessica Schmitt**, Director, Investor Relations, **Arrowroot Capital Partners**

### Think tank C

#### Middle-Market Buyout

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

**Chelsea Reichard**, Vice President, Fundraising, **Bow River Capital**

**3:00**

## Networking refreshment break



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## 3:30 Breakout Sessions

### 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

#### Moderator

**Ira Berg**, Managing Director, Business Consulting & Advisory Services, **Ext Marketing**

#### Panelists

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

**Jamie Viggiano**, Chief Marketing Officer, **Fuel Capital**

**Soo Song**, Head of Marketing, **WIL Capital (World Innovation Lab)**

**Mike Marderosian**, Vice President, **50 South Capital**

### 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?

#### Moderator

**Jeff Mills**, Managing Director, Fundraising and Investor Relations, **Gryphon Investors**

#### Panelists

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

**Laura Fahrney**, Partner, Investor Relations, **Ridgemont Equity Partners**

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

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

## 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?

#### Moderator

**Jeff Williams**, Chief Strategy Officer, **Altvia**

#### Speakers

**Michelle Chao**, Head of Investor Relations, **Bertram Capital**

**Avery Williams**, Head of Investor Relations & Marketing, **Healthquest Capital**

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

**Anne Gherini**, CMO, **Sierra Ventures**

## 5:15 Cocktail reception



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**Day 2:** September 21, 2023

**8:00 Continental Breakfast**

**8:00 Pre-conference breakfast meeting**

### Will AI impact fundraising in private markets?

- Use AI to survey the market landscape
- Hone competitive data analysis
- Make sequencing activities more efficient for a win
- Discuss other use cases for AI tools

#### Moderator

**Hye Kyung (HK) Lee**, Chief Strategy Officer, **InvestorFlow**

#### Panelists

**Jessica Hoffman Brennan**, Partner, Head of Strategy & Investor Relations, **Kohlberg & Company**

**Oren Michaely**, Director of AI, **Motive Partners**

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

**8:45 Think tanks II (GP-Only)**

#### 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?

#### Facilitator

**Peter Delevett**, Director of Communications, **National Grid Partners**

#### Think tank B

##### Investor relations

How is the role of investor relations changing in a highly competitive fundraising environment? Including, what are the pros and cons of placement agents and how do global versus regional placement agents measure up.

#### Facilitator

**Matt Lien**, Director, Investor Relations, **Longwater Opportunities**

**9:30 Chair opening remarks**

**9:40 Keynote Interview: Use meaningful metrics and make them matter**

- Setting strategic goals to know what success looks like
- What KPI's are relevant to brand authenticity?



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- Scorecard metrics that matter when it comes to DEI and ESG
- Measuring success broadly: tangible and intangibles

**Moderator:** Lawrence Aragon, West Coast Bureau Chief, PEI

**Keynote:** Mark Barnhill, Partner, Platinum Equity

**10:30**      **Networking coffee break**

**11:00**      **Breakout Sessions**

## 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

### Moderator

**Grace Kim**, Managing Director, Fundraising and Investor Relations, **The Riverside Company**

### Panelists

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

**Catherine Chen**, Vice President, Investor Relations, **FFL Partners**

**Lindsay Grider**, Global Head of Fundraising and Investor Relations, **Levine Leichtman Capital Partners**

**Brian Kriebel**, Managing Director, **HighBar Partners**

## 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?

### Moderator

**Nick Condie**, Senior Account Executive, **SS&C Intralinks**

### Panelists

**Lisa Parks**, Head of Investor Relations, **Base Capital**

**Amrita Mainthia**, Vice President, Investor Relations, **General Catalyst**

**Tanya Loh**, Chief Marketing Officer, **Forgepoint Capital**

**Nadia Hadi**, Principal, Partner Coverage, **Fifth Wall**

**12:00**      **Luncheon**

## Private Equity Customer Engagement Workshop

**1:00**      **Opening remarks**



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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

### Moderator

**Stephanie Bednar**, Principal, Capital Formation Group, **H.I.G. Capital**

### Panelists

**Jon Hoffman**, Managing Director, Investor Relations, **Rhône Group**

**Natalie Yates**, Head of Business Development and Investor Relations, **Vance Street Capital**

**Devin Banerjee**, Sr. Managing Editor, Industry News & Community, **LinkedIn**

**Tiffany Davis**, Head of Investor Relations, **Sofinnova Investments**

## 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**

**Hadley Wilkins**, VP, Communications, **Atomic**

## 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

### Facilitator

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

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



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## 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

### Facilitator

**Nancy Katz**, Senior Director of Investor Relations, Costanoa Ventures

**Anne Gherini**, CMO, Sierra Ventures

## Roundtable 4: Producing your next AGM

- 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

### Facilitator

**Katie Riester**, Partner, Felicis Ventures

**Mary Adams**, Founder & CEO, Avivant Partners

**2:00 – 2:30**    Rotation 1

**2:30 – 3:00**    Rotation 2

**3:00 – 3:20**    **Networking break**

**3:20 – 3:50**    Rotation 3

**3:50 – 4:20**    Rotation 4

## 4:20            Bringing it all together: 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?

### Moderator

**Zoe Guttendorf**, Head of Marketing and Investor Relations, Artis Ventures

### Panelists

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

**Ryan Parker**, Chief Marketing Officer, Trivest Partners

**Kelly Lassing** Head of Marketing and Communications, Energize Capital

**Shernaz Daver**, Operating Partner and CMO, Khosla Ventures

**5:00**            **End of workshop**



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Private Equity  
International

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