



Investor Relations Network



Investor Relations Network June 2025 Member Meetings

Boston

Date: June 18

Format: In-person

Chicago

Date: June 25

Format: In-person

Learn, Grow, Connect

Build your peer network and learn actionable insights on AI, AGMs, and storytelling.

Roundtable discussions

The roundtable format of this event consists of three 40-minute small group conversations. The facilitators of each topic will rotate tables so that each table discusses each one of the below topic areas.

Topic areas

Technology throughout the LP lifecycle

- Build brands and engage with investors
- Review various third-party solutions and service providers
- CRM best practices to manage investor relationships
- Technology's role in external and internal communications
- Harness AI to unleash potential

AGMs that propel fundraising

- LP Communications before, during, and after
- Enhancements for engaging prospective LPs
- Compare objective-driven formats and content
- Tech, swag, and other key facets of an AGM
- Debriefing and leveraging feedback for yoy improvement

Stories and metrics that matter

- Compare needs and mindsets of different stakeholders
- Convey a consistent story that accounts for stakeholders' nuances
- Omni channel engagement across website and social channels
- Hone your story and/or brand to amplify your message
- What outcomes and metrics (i.e., IRR, DPI) resonate best



For program information:
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Investor Relations Network



Agenda

2:00 – 2:30 PM | Registration & Welcome
2:30 – 2:45 PM | Introductions at Tables
2:45 – 3:25 PM | First Discussion
3:25 – 4:05 PM | Second Discussion
4:05 – 4:15 PM | Break
4:15 – 4:55 PM | Third Discussion
4:55 – 5:00 PM | Wrap Up
5:00 – 5:30 PM | Networking Drinks (Chicago)
5:00 – 6:00 PM | Networking Drinks (Boston)

Speakers (Boston)

Eliza McGrath, Head of Alternative Sales, **50 South Capital**
Ray Grant, VP, Partnerships & Strategic Initiatives, **Altvia**
Terry Wettermann, Managing Director, Investor Relations, **ArcLight Capital**
Richard Carpenter, CEO, **Bladenmore**
Michele Puopolo, Vice President, Director of Marketing, Private Investing, **The Wellington Group**

Sponsors (Boston)



Speakers (Chicago)

Ray Grant, VP, Partnerships & Strategic Initiatives, **Altvia**
Jon Klein, Director, Investor Relations, **Banner Real Estate Group**
Rebecca Converse, Partner, Head of Global Strategic Partnerships, **Pritzker Private Capital**
Karolina Kmiecik, SVP and Head of Communications, **Slate Asset Management**
Sora Monachino, Managing Director, Head of Investor Relations, **Victory Park Capital Advisors**

Sponsor (Chicago)



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