



# 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



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## 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**  
**Karen Bommart**, Partner, Head of Investor Relations, **Battery**  
**Jackie Fleury**, VP, **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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