An inclusive peer community for IR and marketing professionals from private markets

2025 Calendar

** topics, times and dates are subject to change*

April 2025

Virtual Presentation: 1Q Update on the State of Private Markets with PEI

Date: April 24
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

May 2025

Supper Club: New York

Date: May 8, New York City
Format: In person; Dinner
Come join your fellow Investor Relations Network members for cocktails followed by a thought leadership roundtable on communicating with LPs

- Make your fund stand out through compelling storytelling
- How (and how much) they want to hear from you
- Put your best foot forward through your AGM, social media, reporting and more
- Communicating during GP-led secondary transaction, GP-stakes sales, or other firm-wide liquidity solutions

AGMs that mean business

Date: May 20
Format: Virtual; Meeting
Join your Investor Relations Network members to discuss:

- Tailored formats, timing, length and content to interests of LPs
- Enhancements that engage and facilitate interaction
- Lesson learned about tech, video and other key facets of an AGM
- Evaluations for YoY improvement and metrics for assessing efficacy toward goal

PEI

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June 2025

Close the Deal with LPs

Date: June 10
Format: Virtual, Meeting
Join your Investor Relations Network members to discuss:

- What matters most to close the deal
- Building relationships beyond the initial meeting
- Becoming a trusted advisor
- Benefit from key lessons learned

Executive Coaching Workshop – Reducing Friction Early Between Seniors and Juniors

Date: June 12
Format: Virtual; Workshop
Join us to discuss best practices and common headaches when supervising, supporting, and working with younger team members. In this session, we will:

- Discuss the friction points in working practices between senior players (Boomers/Gen X) and junior players (Millennials/Gen Z), leveraging the room's observations and experience
- Identify what micromanagement is versus coaching and why some people always seem to feel micromanaged
- Leverage the interview, onboarding, or 1-1 meeting process to uncover how they work best, how they define micro-management, and what they believe is a fair and preferred way to communicate and negotiate on process, deliverables, deadlines, consequences, short-term goals, and rewards (the communicating and negotiating yours to them – including when it is appropriate to ask "Why?" versus just doing it)
- Introduce the benefits of "Reverse-Mentoring" to inter-generational relationships

Executive Coaching Workshop: Building an Executive Presence Using Gravitas and Reading the Room

Date: June 17
Format: Virtual; Workshop
Join us to learn how to build an executive presence during and outside of meetings. We will:

- Identify and discuss your Gravitas when entering a room and discuss ways to vary this depending on who is in the room, and what their needs are. We will look at gravitas needs from the perspective of investors, operators, and associates, and the challenges IR professionals face in meeting these needs
- Teach you how to monitor and be deliberate in your tone, body language, posture, placement, and verbal habits to maximize your executive presence, as well as introduce a tool called the PVA that can help measure your gravitas
- Develop impression management awareness and skills while understanding the threats others bring in terms of their bias and perceptions

Member Meeting: Boston

Date: June 18
Format: In Person
Join fellow Investor Relations Network members for roundtable discussions on:

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 websites 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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Executive Coaching Workshop: Coaching One-on-One

Date: June 24
Format: Virtual; Workshop
Join us to learn how to apply best practices to 1-1 coaching of direct reports. This can be challenging if we are not connected, lack a plan, don't know how to navigate their emotions, or we find ourselves lecturing followed by awkward silence. In this session, we will:

- Outline ways to increase the speed of connection, and the importance of monitoring and maintaining it throughout the conversation, along with identifying early on where they are now, and where they are headed as we introduce the GROW model
- Assess and adapt to their personality, their emotional state, and their need for a transactional or transformational coaching style, as well as monitoring your bias going into the conversation
- Apply best practices around how and when to question, empathize, and reciprocate via storytelling to improve outcomes

Member Meeting: Chicago

Date: June 25
Format: In Person
Join fellow Investor Relations Network members for roundtable discussions on:

Technology throughout the LP lifecycle

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- 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

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July 2025

How to Tap into the Family Office Market

Date: July 15
Format: Virtual, Meeting
Join fellow Investor Relations Network members to discuss:

- Marketing strategies and tactics for the family office segment
- Crucial steps and resources to educate and attract family offices
- Trends in the market across family offices (flexibility, terms, etc.)

Virtual Presentation: 2Q Update on the State of Private Markets with PEI

Date: July 24
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

August 2025

Fundraising Abroad

Date: August 12
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- Marketing strategies and tactics for attracting foreign investors
- Key trends in the international markets.)?
- Considerations for developing international relationships

Virtual Presentation: Q3 Fundraising Review

Date: August 19
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

September 2025

Crisis Communications

Date: September 11
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- Crisis communications frameworks to apply for your investor communications
- Managing your stakeholders when a crisis occurs
- Considerations for crisis communications (e.g., transparency, cadence, communication channels, one-way and two-way communications, etc.)

October 2025

What to Do When You're Not Fundraising

Date: October 9
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- Best practices for CRM, data management, and analytics/reports
- Managing your aggregated research while in pre-fundraise phase
- What you can do to 'always be fundraising' even when not officially in market

Executive Coaching Workshop: Changing Your Brand and Perceptions of You Over Time (Outside Your Organization)

Date: October 21
Format: Virtual; Workshop
Join us to learn how to develop your reputation outside your organization. To be thought of as a competent professional who cares about other's success. In this session, we will discuss:

- Common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list.
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation

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Executive Coaching Workshop: Shifting from Expert to Non-Expert Leader: How to Lead When You Aren't the Expert in the Room

Date: October 23
Format: Virtual; Workshop
Join us to learn how leaders can add value in team meetings, even when the topic isn't their expertise. In this session, we will:

- Uncover the fears and beliefs managers have that lead to imposter syndrome, which often limits their questions and comments
- Discuss leader gravitas and its impact on energy and contributions of the team during meetings.
- Apply principles of leadership coaching in meetings when you aren't in charge, nor are the expert, to foster strategic group discussions and gain the respect of the room.

Executive Coaching Workshop: Working with and Managing Different Personalities

Date: October 28
Format: Virtual; Workshop
Join us to learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will discuss:

- Breakdown the four categories by: imaginative talkers, detail workers, decision makers, peacekeepers, and additional combinations of work context personality
- Discuss which work personality causes finance professionals the most challenges
- Unpack hot buttons and motivational drivers for each category

Virtual Presentation: 3Q Update on the State of Private Markets with PEI

Date: October 30
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

November 2025

How to Tap into the Insurance Market

Date: November 13
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- How insurance companies fit into the institutional investor space
- Trends we are seeing around insurance companies desire within private market investments (e.g., fund types, asset classes, geographies, co-investment, etc.)?
- The future of insurance companies as LPs.

December 2025

How to Create Events & AGMs that LPs Love

Date: December 9
Format: Virtual; Meeting
Join your Investor Relations Network for discussion on:

- Communications and productions tips for compelling LPs to attend in person
- Virtual, hybrid, and in-person events – what is everyone doing these days?
- Tools and tactics for productive and seamless events
- Pre- and post-event actions for optimizing engagement

Virtual Presentation: PEI LP Perspectives

Date: December 16
Format: Virtual; Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

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