



IR Magazine Think Tank – West Coast 2018

Agenda

Wednesday, March 28, Garden Court Hotel, Palo Alto, CA

8.00 am Breakfast and registration

9.00 am Welcome to the IR Magazine Think Tank

9.15 am The state of capital markets – and impact on IR

Hear about the big changes in the markets, and the latest trends that will impact IR and investor sentiment.

Mike Lehmann, professor of economics, **University of San Francisco**

9.45 am Refreshment break

10.00 am The big governance debate: The 'push-and-pull' between the increase of activism and the rise in passive investments

The investor landscape is becoming more polarized, with growth in both short-horizon and long-horizon investors causing different challenges for governance and engagement. This session will feature panelists from opposite ends of the governance spectrum, where you can learn how to increase engagement with passive investors.

Moderator: Chris Evenden, vice president of investor relations, **Electronic Arts**

Rene Casis, ETF portfolio manager, **American Century Investments**
Joanne Medero, managing director, **BlackRock Investment Management**
Robbie Miles, assistant vice president and investment analyst, **Allianz Global Investors**

11.00 am Mifid II – What about US?

Hear panelists from a diverse range of company sizes share their experiences and expectations on Mifid II impacts. Then join peers of similar market caps to talk specifics about challenges, changes and strategies that IROs from similar-sized companies are experiencing.

Brendan Fitzpatrick, director of analytical services, **Ipreo**
Victoria Hyde-Dunn, senior director of investor relations, **8x8**
Gabrielle Rabinovitch, head of investor relations and business intelligence, **PayPal**

Roundtable discussions – choose your group

Large caps
Small to mid-caps

11.45 am IR in the C-suite – How IROs can become more strategic

Learn about the strategic role IROs can play in business and how to make your way to the C-suite.

Moderator: Ben Ashwell, digital editor, **IR Magazine**
Carol DiRaimo, chief investor relations and corporate communications officer, **Jack in the Box**
Smooch Repovich Reynolds, managing director, **ZRG Partners**

12.15 pm Working lunch

1.00 pm Are you making the most of your engagement and targeting efforts?

Feel like there isn't enough time, budget or resources to deal with the demands of being an IRO? Those pressures are likely to increase, running the risk of not meeting the obligations of your investors, or potential investors not hearing your equity story.

Moderator: Ben Ashwell, digital editor, **IR Magazine**
Anne Chapman, managing director, **Joele Frank**
Marilyn Mora, head of investor relations, **Cisco**

1.30 pm What Washington, DC has in store for public companies

Hear from a former SEC regulator turned exchange operator on what changes are in store for publicly traded companies.

Moderator: John Longobardi, head of listings, **IEX**
John Ramsay, chief market policy officer, **IEX**

2.00 pm Refreshment break

2.15 pm Diving deep into IR best practice: Q&A with the buy side and sell side

Hear honest discussions about investor and analyst expectations and discover what their pet hates are about IR – so you can avoid them. Then learn and be inspired by examples of good IR.

Moderator: John Nunziati, investor relations professional
Kenneth Bruce, managing director of US equity research, **Bank of America Merrill Lynch**
Jared Goodman, global equity analyst, **Colorado PERA**
Lori Keith, portfolio manager, **Parnassus Investments**

3.15 pm Blockchain – Flash in the pan, or game changer for IR?

The technology underpinning crypto-currencies such as bitcoin is the trending topic for business in 2018, but can this technology be as disruptive to business as the internet, smartphones and social media?

Lyll Dampeer, president of investor communication solutions for the US, **Broadridge Financial Solutions**

3.45 pm Final thoughts and wrap-up

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