

# IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023  
etc.venues 360 Madison Avenue, New York

## AGENDA

This event is in person only. All times are in ET (Eastern Time)

**8.15 am**     **Registration, refreshments and networking**

**8.55 am**     **Welcome to the forum**

**9.00 am**     **The importance of AI in the capital markets**

AI is transforming the capital markets, beyond the practice of investor relations. Understanding how AI can be adopted by key stakeholders in the capital markets is critical for IROs as they integrate AI into their strategy. This opening session will set the scene for the day and provide a strategic overview of AI's emerging role within the market.

- Defining AI within the context of the capital markets, from investor relations to the buy side, sell side and corporate access
- The case for an AI-powered IR program: Why an AI co-pilot provides a competitive advantage
- The future of AI in the capital markets: New capabilities on the horizon and critical trends to watch

Darrell Heaps, founder and CEO, Q4

**09.25 am**     **Harnessing the power of AI for IR: Opportunities, applications, and implications**

The discussion will center on the key trends, risks and considerations for IROs and give a bird's eye view of integrating AI as a driver of efficiency, insight and value creation across the investor relations function.

- High-impact applications: Prioritizing AI for content creation, earnings, sentiment analysis and targeting
- Risks and implementation challenges: Data privacy, compliance and change management
- Leveraging AI's potential while proactively managing the risks and ethical concerns
- The evolution of AI and the opportunities it presents for investor relations

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence  
Adam Borgatti, senior vice president, corporate development & investor relations, Aecon Group  
Darrell Heaps, founder and CEO, Q4

**10.00 am**     **AI as a stakeholder: Implications for IR in an AI driven capital market ecosystem**

# IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023  
etc.venues 360 Madison Avenue, New York

The buy-side has been using AI to inform their decisions for years and it continues to shape the investment landscape. We look inside the buy-side's AI adoption to discover how investors harness AI and what IR teams can do to ensure that their information is found, and correctly interpreted by buysiders who use AI. The panel will discuss:

- How the capital markets use AI to make investment decisions and gather information
- The risks companies face when investors and rating agencies utilize AI in their analysis
- Techniques used, such as NLP, to extract insights from the information put out by IR teams, such as earnings calls, presentations, reports and news
- Advice on how to best adapt your disclosures and earnings calls in an AI-driven world

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence  
Grant Bartucci, corporate access & research  
Bruce Kahn, senior portfolio manager, Shelton Sustainable Equity Fund

## 10.25 am **Networking break**

## 10.55 am **Best practice: Ethics, compliance and risk management for various AI use cases**

Adopting new technologies like AI demands proactive governance. This session will equip IROs to integrate AI responsibly and minimize regulatory, reputational and data risks. Panelists will outline best practices for transparency, including:

- Actionable strategies to deploy AI as a trusted advisor rather than a 'black box.'
- How to ensure accuracy and prevent bias while protecting confidential data
- Framework to develop a robust AI policy and become stewards of responsible AI adoption
- Embedding accountability at every step of an AI-assisted investor engagement process
- Mitigating risks by ensuring third-party providers are also protected and compliant

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence  
Michael Marks, investor relations, Vizio  
Quentin Weber, director, investor relations, WSP Global

## 11.25 am **AI for IR lightning pitch**

Hear from the very best service providers in IR and learn in just 90 seconds what innovations and developments they are making to help harness the power of AI for your company.

## 11.35 am **Level up your content with AI: Tools and tactics for impactful communications.**

# IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023  
etc.venues 360 Madison Avenue, New York

This hands-on session will showcase AI's immense potential for streamlining and strengthening investor communications. Discover easy wins and techniques to harness natural language generation and creative AI for highly engaging content, including:

- What resources, budget and skillset do you need to kickstart your AI content creation?
- Delivering consistent messaging: Evaluating content accuracy, privacy and mitigating risks
- An overview of the latest AI writing and design tools tailored for IROs – what's right for you?
- Identifying the workflows and use cases that benefit the most from AI assistance
- Tailoring and optimizing earnings scripts, visual presentations and social posts with AI

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence  
Jason Fooks, senior vice president, investor relations, Brookfield Asset Management  
R.J Hottovy, head of analytical research, Placer.ai  
Emily Lau, investor relations and corporate communications professional, Enthusiast Gaming

## **12.20 pm** AI for IR lightning pitch

Hear from the very best service providers in IR and learn in just 90 seconds what innovations and developments they are making to help harness the power of AI for your company.

## **12.30 pm** Lunch

## **1.30 pm** The importance of language in machine-readable disclosures

Disclosures are critical to get information out to the buy-side and inform both voting and investing decisions. Earnings calls, proxy statements, annual reports and press-releases keep portfolio managers and analysts informed on the financial health and outlook for your business, however, the need to cover more companies mean that investors are turning to AI and web-crawlers to filter information from these reports.

This session discusses how IR teams can adapt their disclosures to align with how investors are looking for information to ensure your critical business updates are not only seen, but interpreted correctly. Join this session to discuss:

- The ways that investors are implementing AI into their processes, and the implications are for IR teams
- How AI works in analyzing and digesting company information, and ways to overcome risks such as missing critical information, or mis-interpretation of information
- Proven strategies to increase your visibility and accuracy of information in an AI driven world

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence  
Christopher Blake, executive director of innovation & operations, S&P Global

# IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023  
etc.venues 360 Madison Avenue, New York

Roger Freeman, co-head, data science, Neuberger Berman

## 2.15 pm **Hitting the ground running: Actionable first steps to replicate in your IR team**

This session will offer multiple perspectives and examples of how an IR team can practically begin integrating AI into their IR strategy. Discover from experts in the field what steps you could take to immediately to jumpstart your AI journey. We will cover:

- Assessing what options exist for IR teams and what specific tools are available to be utilised
- Assessing your current IR capabilities to identify the areas where AI could add value
- A beginners guide to adopting and implementing new AI strategies and functions

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence  
Sherif El-Azzazi, former investor relations officer, Brookfield Renewable  
Kam Mangat, vice president, investor relations and corporate strategy, NEXE Innovations  
Dan Wayne, former investor relations specialist, ITT

## 2.45 pm **Networking break**

## 3.15 pm **Mini-workshop and roundtables: Hands-on strategies for adoption and integration**

In this interactive session, attendees will synthesize learnings into an actionable checklist to hit the ground running on deploying AI. Through group collaboration and exercises, IROs will blueprint an AI implementation roadmap that's tailored to their IR program, including:

- Assessing and prioritizing AI opportunities using a "now, near, far" framework
- Workshopping real-world risk scenarios and developing policies for responsible adoption
- Outlining governance best practices for ethical, compliant AI integration
- Identifying the top three AI techniques to enhance targeting, analysis, content generation
- Restructuring team roles, skills, and workflows in an AI future

## 3.45 pm **Learn from the vanguard: Leveraging AI to drive better collaboration**

In this joint session, we'll look at how AI is enabling smarter collaboration between IR and governance teams. Where do the opportunities lie for AI in the overlap between governance and IR work flows, particularly around ESG and shareholder communications, and how are early adopters approaching the pitfalls and the potential of an integrated approach? This session will cover:

- Real world case studies and success stories of specific use of AI to improve collaboration between IR and governance teams
- Using AI to identify best practices around sustainability and shareholder communications

# IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023  
etc.venues 360 Madison Avenue, New York

- Advice on how to replicate success in your own team

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence  
Gregg Lampf, vice president of investor relations, Ciena  
Mike Stiller, managing director, new growth initiatives, Nasdaq

## **4.15 pm**    **Closing keynote: Next steps, possibilities and the road ahead for AI and IR**

This session will consolidate all the learnings from the day into a prescriptive framework for thoughtfully leveraging AI as a trusted advisor and a new source of delivering shareholder value. We discuss the immense possibilities that an AI-empowered future presents and what the IR and governance worlds could look like in 10 years

- Reviewing top applications and use cases transforming IR and corporate governance in the coming months
- Actionable next steps for piloting and adopting AI-enabled best practices responsibly
- A vision for how AI will reshape workflows, teams, and engagement in the next 3-5 years
- Longer-term projections on AI's potential to redefine analyses, communications, and strategy
- Cultivating a forward-looking mindset focused on opportunities, not threats

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence  
Erik Carlson, COO and CFO, Notified

## **4.45 pm**    **Closing remarks**

## **5.00 pm**    **Drinks reception and networking**

## **7.00 pm**    **End of event**