

CORPORATE REPORTING FORUM

Proxy Statements | ESG | Earnings | 10Ks

Wednesday, November 6, 2024
Clifford Chance offices, New York



As corporate reporting requirements increase globally and companies face greater expectations in terms of reliability, quantity and quality of disclosures we created the corporate reporting forum to help advance corporate reporting practices so that they add further strategic value, aid decision-making and serve the needs of public company stakeholders.

Throughout the one-day event, we will hold interactive discussions on a wide range of reporting disciplines, including ESG reporting, proxy statements and quarterly & annual financial results.

The corporate reporting forum is open to all involved in financial and non-financial reporting and is regularly attended by governance, investor relations, sustainability and communications professionals at public companies.

AGENDA

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

8.15 am **Registration, refreshments and networking**

8.45 am **Welcome to the forum**

9.00 am **Global reporting in 2025: Navigating the future**

The Corporate Reporting Forum will begin by outlining the key topics that will be crucial for preparers of reports over the next 12 months.

Participants will gain insights into the challenges and strategies for harmonizing reports to meet various regulatory demands without diluting the core message.

The session will also provide a forward-looking perspective on upcoming regulatory changes and trends in global reporting impacting multinational companies.

- Trends in reporting: A review of the latest trends in corporate reporting, what companies needed to do to stay ahead, and what changes are on the horizon
- Navigating Diverse Regulations: Hear strategies for coping with different reporting requirements in Europe and the US. Learn how to remain compliant across multiple jurisdictions
- Exploring the impact, risks, and opportunities of new disclosure rule: As companies continually face increased reporting requirements in a variety of areas, learn which processes can be implemented to help you understand the requirements, format and peer activities when a new disclosure is required
- Harmonizing reporting for multinational companies: Best practices for aligning reporting so that it complies with various international regulations. Learn how to gather, prioritize, and summarize the necessary information effectively.

Moderator: Steven Wade, head of content, IR Magazine

Dana Eddis, associate general counsel and corporate secretary, Corteva

Roxanne Sharif, senior manager, sustainability compliance, Mohawk Industries

9.45 am **Preparing for the next proxy season: Essential steps:**

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This session will provide a comprehensive overview of the critical preparations needed for the upcoming proxy season. Attendees will gain insights into the potential impacts of the SEC's rulemaking agenda and trends in investor voting policies and proxy advisor recommendations.

The session will also delve into the latest disclosure requirements, including cybersecurity, clawbacks, executive compensation and the possibility of increased human capital disclosures.

- Must-have disclosures based on SEC rulemaking and investor trends: Understand the SEC's rulemaking agenda and its implications for 2025. Analyze trends in investor voting policies and proxy advisor recommendations to identify key disclosure priorities for the year ahead.
- Cybersecurity reporting: Prepare for cybersecurity management and disclosure. Hear examples about how companies are approaching the new rule.
- Executive compensation: Examine the increasing scrutiny of executive compensation as it relates to Pay Vs Performance. Explore the considerations and disclosure needs when tying remuneration to ESG metrics
- Clawback disclosures: Discuss the implementation and implications of reporting on clawback policies
- Human capital reporting: Evaluate the rise of human capital reporting and its significance in the current disclosure landscape.

Moderator: Steven Wade, head of content, IR Magazine

Fionna Ross, sustainability investment director & head of sustainability institute, Americas, ABRDN

Ron Schneider, director of corporate governance services, DFIN

10.30 am **Networking coffee break**

11.00 am **The new era of ESG: Adapting to drastic changes**

This session is designed to equip governance, investor relations, and sustainability teams with the knowledge and tools needed to navigate the rapidly evolving ESG reporting landscape.

Participants will learn how to adapt their disclosures to meet new standards and expectations, ensuring their reports remain relevant and impactful.

This session will cover key actions for different levels of ESG reporting, and the latest trends in materiality and standardization.

Additionally, it will address the impact of social and geopolitical changes on future ESG reporting requirements and the importance of integrating ESG issues into broader business strategies.

- Trends in ESG reporting: Explore trends in materiality, standardization, and investor-focused disclosures. Learn how peers are managing these trends and how not to get left behind with your sustainability disclosures
- Sustainability reporting best practices: Discuss whether the frequency of materiality analysis is fit-for-purpose. Learn about what makes best-in-class ESG reporting different, and what are the key focus areas when beginning on your ESG reporting journey
- Levels of ESG data: Hear key actions companies should take at the Basic, Better, and Best levels of ESG reporting. Also discuss the enhanced role of third-party auditors and learn how to get started with data assurance
- Risk management through ESG reporting: Strategies to overcome risks and add value to the company through robust ESG reporting practices

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- Geopolitical impacts on ESG reporting: How changes in political leadership could affect corporate reporting. Discuss what will need to be disclosed in the future, and to what extent

Moderator: Steven Wade, head of content, IR Magazine

Darrah Feldman, senior vice president of sustainability and responsibility, Ziff Davies

Chris Libre, Head of ESG, Applied materials

11.45 am **Cross-Department collaboration to fulfil stakeholder expectations**

This session will explore the critical role of cross-department collaboration in meeting stakeholder expectations and enhancing corporate reporting.

Participants will learn strategies to ensure all departments are aligned and working cohesively, minimizing duplication of efforts.

- Ensuring Departmental Alignment: Strategies to ensure all departments are “singing from the same hymn sheet” and avoiding duplication of work
- Understanding stakeholder needs: Identifying what investors, stewardship teams, management and the board want to see in corporate reports and where they are looking for information about your company. Additionally, discuss how to work with sustainability and procurement teams to help suppliers provide relevant data for your reports
- Educating all functions on the value of reporting: Educating departments on the risks involved in reporting and ensuring everyone understands the value that accurate and compliant disclosures can provide the company.

Moderator: Steven Wade, head of content, IR Magazine

Erika Balbuena, Head of ESG and sustainability, Robinhood

Carrie Christopher, senior director ESG and sustainability, Splunk

12.30 pm **Lunch**

1.30 pm **Roundtable discussions**

2.00 pm **Utilizing AI and automation to reduce reporting fatigue and improve disclosures**

This session will delve into the transformative impact of Generative AI, automation, and other advanced technologies on reporting. Attendees will explore how these tools can enhance efficiency and quality in reporting, reducing the burden on teams and improving the accuracy and timeliness of disclosures. The panellists will also cover practical applications of AI in materiality assessments, keeping public data up to date, and streamlining ESG questionnaires.

Participants will learn about the best practices for integrating AI into quarterly reporting and how technology can support a top-tier reporting strategy.

- Enhancing materiality assessments with AI: How AI can be used to improve the materiality assessment process
- Maintaining accurate public data and streamlining ESG questionnaires: Hear strategies for implementing technologies to monitor public data aggregators and rating agencies. Learn techniques for reducing survey fatigue and ensuring consistent responses across different questionnaires

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- Advanced reporting strategies: How technology and data can enable a best-in-class reporting strategy, including the use of databases and dashboards to automate data collection and standardize disclosures
- Clustering data with AI: Learn how to utilize AI to organize large volumes of data into appropriate categories, such as CSRD and SEC requirements, and map out the entire reporting process.

2.45 pm **Networking coffee break**

3.15 pm **Re-thinking annual reports: Integration and innovation**

This session will challenge the traditional concept of annual reports, questioning their necessity in an era where much of the information is available publicly.

Participants will explore the benefits and challenges of integrated reporting, particularly the inclusion of ESG reports in 10-K filings. The session will address the complexities of aligning legal, financial, and ESG reporting to ensure comprehensive and transparent disclosures.

- The Future of Annual Reports: Debate if there is still a need for traditional annual reports. Explore how the shift towards online and other forms of reporting has impacted communications approaches
- Integrated Reporting: Discuss the benefits and challenges of adding ESG reports to the 10-K and hear strategies to consolidate reporting
- Understanding your audience: Hear how companies choose where to disclose information based on the audience and their preferred information sources
- Maintaining Data Integrity: Learn best practices for maintaining consistency and integrity of data across different types of reports.

Laura Maushart, corporate governance counsel, Allstate

4.00 pm **Increasing the reach and understanding of your reports**

This session will offer valuable insights on designing disclosures, messaging, and communication plans to ensure they effectively reach and resonate with the intended audience.

Participants will learn how to create impactful campaigns around earnings, annual and ESG reports, addressing both supportive and critical stakeholders.

The session will also explore the strategic use of digital and social media to broaden the reach of quarterly and annual results, ensuring that disclosures are not only seen but understood by a diverse audience.

- Designing impactful campaigns: How to design and create a campaign around your financial and ESG reports to enhance their impact
- Addressing critical stakeholders: Strategies for considering negative actors, such as the anti-ESG audience, bearish analysts or activist investors. How can they may use your disclosures in a detrimental way, and what you can do to mitigate the impact
- Leveraging digital and social media: Learn how to utilize digital and social media platforms to enhance the visibility and impact of your disclosures
- Best practices for increasing reach: Techniques to achieve a wider reach for your quarterly and annual results, ensuring they are accessible and engaging to a broad audience

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- Effective messaging: Crafting clear and compelling messages that resonate with different stakeholder groups and effectively communicate the core message consistently across different channels.

Moderator: Steven Wade, head of content, IR Magazine

Erika Karp, executive director, finance leaders fellowship, Aspen Institute

Scott Lam, senior vice president US sales & partnerships, The Nuvo Group

4.30 pm

Summary, closing remarks and end of conference