



IR MAGAZINE THINK TANK EAST COAST

Exclusively for heads of IR
Wednesday, May 18, 2022

In-person event: etc.venues, 360 Madison Avenue, New York

ABOUT THE THINK TANK

The **IR Magazine Think Tank – East Coast** lets you exchange insight and practical advice on some of the biggest challenges and opportunities facing the IR industry today. Featuring **panel sessions on topical issues and trends**, giving context to **fast-paced, efficient roundtable discussions**, we will cover both the big picture and the finer details.

Our in-person think tanks are **invitation-only, free to attend and behind closed doors**, allowing you to have **frank and open discussions** on the issues most relevant to your business in an informal environment.

AGENDA

All times are in ET (Eastern time)

8.30 am **Registration and networking**

9.00 am **Welcome to the think tank**

Steve Wade, head of event content, *IR Magazine*

9.05 am **Macroeconomic trends – Inflation, sanctions and supply-chain disruption**

As economies worldwide emerge from the pandemic, we are starting to enter a period of uncertainty and recovery. With the recent invasion of Ukraine, upcoming mid-term elections and disruption to global supply chains, investors and IROs are looking for guidance on what is coming next. In this panel, we will explore the following subjects:

- Assessing the impacts of the Ukraine crisis on local and global supply chains
- The implications of an inflationary environment on costs, pricing and sector rotation
- Market outlook: What are the key drivers of economic growth on the road to recovery?

Moderator: Steve Wade, head of event content, *IR Magazine*

Ohsung Kwon, vice president, US equity strategy, Bank of America Merrill Lynch
Parker Ross, global chief economist, Arch Capital

9.35 am **Assessing the legacy of the pandemic on shareholder activism and M&A**

As the dust from Covid-19 settles, we now look to the longer-term impacts of the pandemic on M&A activity and shareholder activism. We will explore what has changed, what is expected, and how IR teams should prepare during this session.



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- Reflecting on the impact of the pandemic and recent unstable market conditions on M&A and activism
- Who is most at risk of activism and hostile M&A in the current environment, and what steps can IR teams take to prepare?
- How are activist tactics changing, and how should targeted companies respond?

Moderator: Tim Human, senior reporter, *IR Magazine*

Kai Liekefett, partner, Sidley Austin

Michael Verrechia, managing director, M&A and activism, Morrow Sodali

10.05 am Roundtables: Navigating inflationary environments post-pandemic

10.35 am Morning coffee break

10.45 am The best way to measure and report your company's ESG performance

With the SEC increasing the pressure on how public companies disclose ESG information, IR teams need to be prepared to deal with the transition from voluntary to mandatory reporting. This session will discuss the direction the SEC is taking regarding ESG and how other companies are managing the ongoing integration of financial and 'non-financial' disclosures.

- An update on how ESG regulation and disclosure requirements are changing: What needs to be done now?
- The best way to measure and report your company's ESG performance: What do investors want?
- Longer-term expectations around SEC requirements: What does the future hold?

Moderator: Steve Wade, head of event content, *IR Magazine*

Nick Belfanti, product specialist, Sentieo

Jaymin Desai, director of strategy, Planetly by Onetrust

11.15 am Company purpose and culture in the age of ESG

Staying compliant with mandatory reporting rules is critical, but given the rapid evolution of ESG, it is just as important to encourage long term ESG thinking. This panel will look at how to prioritize ESG activities, tie together different parts of the business into a succinct ESG story and go beyond a culture of compliance to a culture of best practice. Topics include:

- The shift towards stakeholder capitalism and what that means for ESG
- Working across teams to cultivate and communicate a holistic ESG strategy
- What do investors want to see in your sustainability reports?

Moderator: Tim Human, senior reporter, *IR Magazine*

Andrew Ciafardini, chief sustainability officer, FIS Global



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Varsha Doshi, regional ESG senior manager, S&P Global Market Intelligence
Christina Wong, director, ESG integration, BlackRock

11.45 am Roundtables: Turning long-term ESG visions into action

12.15 pm Lunch break

1.15 pm Corporate access trends – Reaching the right people in the right way

The sudden transition to online working had a considerable effect on how the sell-side and buy-side operate, but it also helped catalyze existing trends. In this session, our panellists will reflect on the impact (both positive and negative) the pandemic has had on corporate access and how best to target and engage with investors. We will cover:

- Reflecting on some of the most significant changes to corporate access
- Directly targeting the buy-side: trends, technology and best practice
- The increasing importance of retail investors and how best to engage them
- Identifying and targeting active investors as ETFs continue to grow

Moderator: Tim Human, senior reporter, *IR Magazine*

Elizabeth Librizzi, SVP head of corporate access and advisory services, Alliance Bernstein

Caspar Tudor, director, head of investor relations, Waters Corporation

David Whyte, CEO and co-founder, Irwin

1.45 pm Running successful hybrid events – Tools, technology and best practice

With the appetite for in-person events returning, there is a real opportunity to combine the efficiency of remote working with the richness of face-to-face meetings. This panel will look at:

- How quickly companies are getting back on the road, and what the right balance is between online and in-person meetings
- How to make the most of management's time in an age of constant virtual exposure
- Which platforms and service providers the industry prefers

Moderator: Steve Wade, head of event content, *IR Magazine*

Rich Babineau, director of issuer solutions, Mediant

Lynn Antipas Tyson, executive director of IR, Ford Motor Company

2.15 pm Roundtables: Practical insights on engaging with investors in a hybrid world

2.45 pm Elevated expectations: How management teams and boards of directors have raised the bar for IROs

Smooch Repovich Rosenberg, chief talent solutions innovator, SmoochUnplugged



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3.00 pm **Adapting to new normal: the evolving role of the IRO**

The perception of IR has changed considerably throughout the past few years, and so has the IRO's role. With an increasing number of IROs joining from the sell side, companies are starting to emphasize strategic thinking, broad technical knowledge and a keen understanding of how financial markets work. Here we will discuss:

- The changing culture of IR: Assessing and evaluating the new normal
- How ESG and remote working trends are influencing IRO skillsets
- Trends in hiring practices, management and career development

Moderator: Tim Human, senior reporter, *IR Magazine*

Travis Lan, SVP, corporate finance and business development, Valley National Bank

Jill Slattery, SVP and head of IR, Hilton

Steve Winoker, VP of investor relations, General Electric

3.30 pm **Roundtables: IR and beyond – Career development and upskilling strategies**

4.00 pm **Buy-side panel: What do investors want from IR in a hybrid world?**

During this open Q&A session, our panel of investors will address any concerns and questions you may have about the coming months. This is an opportunity to engage with a broad range of investors in a frank and open environment. Topics up for discussion include:

- What is the right balance for online and in-person engagement?
- How exactly does ESG information influence your investment decisions?
- What are your expectations from IROs in the current market environment?

Moderator: Steve Wade, head of event content, *IR Magazine*

Kristen Lang, deputy director, ESG investing, Boston Trust Walden Company

Griffin Newman, portfolio manager, Point72 Asset Management

4.30 pm **Closing remarks and drinks reception**

Steve Wade, head of event content, *IR Magazine*