



# Equality in IR 2021

A global, virtual, interactive event on inclusion

Wednesday, June 30, 2021

LIVE: 11 am – 3 pm ET

## About the forum

Our fifth annual **Equality in IR forum** is back again by popular demand. The event is part of our global initiative aimed at creating a level playing field for excellence in the IR community. With the help of expert speakers and those leading the charge at public companies, the event will include practical advice on:

- how the investment community view DE&I and building a more **inclusive investment community**
- how to **integrate DE&I into your IR story**, the business value of inclusion and
- on a personal level, how you can **negotiate new responsibilities** and move up the ladder

**Far removed from a traditional webinar format, our virtual event platform allows attendees to:**

- Hear from the investment community and experts on how DE&I fits into the IR strategy of a company
- Join mentoring sessions to receive tailored guidance on key aspects of career progression
- Hear from successful heads of IR & CFOs on negotiating new responsibilities in a new normal
- Have one-on-one private video meetings with fellow IR professionals to build your network

[Book your place for \\$45](#)

## Agenda at a glance

All times below are in ET (Eastern Time)

Time	Wednesday, June 30, 2021
<b>11.00 am</b>	<b>Opening remarks: Welcome to the Equality in IR event</b>
11.15 am	Equality in the investment community: Trends, best practices and new metrics
12.00 pm	Rock The Street, Wall Street: How the investment community can give back
12.15 pm	It starts at the top! How Henry Schein's CEO strives for a diverse and inclusive workforce
<b>12.45 pm</b>	<b>15-minute networking break: Expand your list of contacts</b>
1.00 pm	Equality as part of your company's IR story: The business value of a DE&I strategy
1.45 pm	Equality in the IR profession: Addressing gaps in skillset and pay to drive your career forward
2.15 pm	Roundtable discussions: Virtual mentoring sessions
2.45 pm	DE&I and the global pivot: How influence and success is owned by our internal compass
<b>3.00 pm</b>	<b>Summary and end of event</b>



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## Agenda in detail

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**Time**      **Wednesday, June 30, 2021**

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**11.00 am**    **Opening remarks: Welcome to the Equality in IR event**

[Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

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**11.15 am**    **Equality in the investment community: Trends, best practices and new metrics**

Given the increasing demands for renewed diversity and inclusion practices in the investment community, the era of DE&I as a 'check the box' initiative appears to be coming to an end. In this session, we look at how the investment community is evolving to address these issues.

- Impact of political, global and social events on DE&I in the investment community
- Putting S in the centre of ESG: How are companies addressing DE&I in the context of ESG?
- How can IR teams demonstrate value based on workplace practices? What is the business case for having DE&I form a key part of investment decisions?
- What can influence the buy-side and sell-side to improve D&I at their firms? What metrics can help enact long-lasting change beyond value statements?
- What dynamic ways can a company give back to communities in need beyond simply donating or volunteering?

[Mike Chen, director of equity & head of sustainable investments, PanAgora Asset Management](#)

[Marvin Owens, chief engagement officer, Impact Shares](#)

[Mary Turnbull, managing director, corporate access, Raymond James](#)

[Moderator: Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

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**12.00 pm**    **Rock The Street, Wall Street: How the investment community can give back**

[Maura Cunningham, founder and CEO, Rock The Street, Wall Street](#)

[Lisa Warren, chief customer officer, Mediant](#)

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**12.15 pm**    **It starts at the top! How Henry Schein's CEO strives for a diverse and inclusive workforce**

With corporations increasingly focused on diversity, equality and inclusion as part of their ESG initiatives, we interview the management team of a Fortune 500 company on their efforts.

- Promoting gender parity in a global organisation: How do you help women, who have downshifted their careers during the pandemic?
- Collecting gender compensation data: How do you identify and address significant gaps?
- Connecting ESG engagement efforts including gender parity discussions with financial performance at investor meetings: What are the expectations?
- Attracting investors based on workplace culture and DE&I efforts: How is the investment landscape evolving as ESG disclosure becomes more important to investment decisions?
- How has the assessment of board directors' contributions and suitability evolved recently?
- Key steps to foster a diverse workforce: What can management do to promote inclusion?

[Stan Bergman, chair and CEO, Henry Schein](#)

[Carolynne Borders, vice president of investor relations, Henry Schein](#)

[Jennifer Kim Field, vice president of CSR and executive director, Henry Schein Cares Foundation](#)

[Moderator: Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

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**12.45 pm 15-minute networking break: Expand your list of contacts**

This feature works like speed dating. You will be matched at random with another attendee and you have five minutes to decide whether you'd like to exchange contact details. It's good fun!

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**1.00 pm Equality as part of your company's IR story: The business value of a DE&I strategy**

Best-in-class organizations realize that diversity and inclusion is a prudent business practice that has wide-ranging benefits for both its employees and shareholders. In this session, we look at how to measure these benefits and how they fit into your company's IR story

- How do you build a workplace culture that truly promotes diversity and practices inclusion?
- Identifying and addressing unconscious bias in the workplace
- How do we raise the profile of women leaders beyond middle management?
- How does DE&I fit into the wider IR strategy? Communicating corporate culture via IR
- How can IR teams become agents of change for the community?
- What is working and what isn't when it comes to recruiting and retaining top talent?
- What is the ultimate measure of ROI in human capital? What diversity targets should we be aiming for in the IR profession? What can we learn from companies that have succeeded?

[DK Bartley, chief diversity, equity and inclusion officer, Moody's](#)

[Amy Greene, former chief communications officer and head of IR, Avon Worldwide](#)

[Ripa Rashid, managing director and head, inclusion and diversity, Cowen](#)

[Moderator: Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

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**1.45 pm Equality in the IR profession: Addressing gaps in skillset and pay to drive your career forward**

In this session, IROs who have climbed the ladder from various career starting points share their war stories and recommendations on the skills necessary to succeed in the world of IR.

- What determines an IRO's pay and career advancement? Is it a finance background?
- Tips to negotiate equal or better pay: how do you calculate your own market value?
- Developing professionally as an IR leader – what are the marks of a good IRO?
- What is missing from your skillset? Broadening your remit to include new responsibilities
- Working in an IR agency vs. in-house IR – pros, cons and advice for making the move
- Getting a seat at the table – ensuring IR have a voice at the company's strategic level
- Landing a message: The art of making your voice heard in male-dominated sectors
- What is your personal strategy for professional development in the IR world? How often should you move roles to get senior roles or higher compensation?

[Isabelle Adjahi, vice president of investor relations and sustainable development, Lion Electric](#)

[Mei Ni Chu, director of investor relations, Voya Financial](#)

[Katie Fasken, managing director, Slate Asset Management](#)

[Moderator: Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

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**2.15 pm Roundtable discussions: Virtual mentoring sessions**

Our interactive sessions are back by popular demand! Choose a theme and get practical advice from our esteemed ambassadors on how to deal with specific challenges, improve ways of working and structure your career.

- From talk to action: How can firms attract a diverse candidate pool and successfully recruit diverse candidates? – [Eric Martinez, founder, EJM Investor Relations](#)
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- Finance is personal: Making up for a disruptive work cycle and imposter syndrome – [Elizabeth Naumovski, financial literacy advocate](#)
- Why you shouldn't always have to work twice as hard to make twice the difference – [Lindsey Stewart, senior manager, investor engagement, KPMG](#)

## 2.45 pm **DE&I and the global pivot: How influence and success is owned by our internal compass**

While eager to leave the past few years of challenges behind us, the imprint on everyone about the continued global challenges connected to embracing diverse constituencies, is profound. Understanding how one's internal compass is critical to moving forward in many dimensions of our lives is key, as is learning to operate at a very high level of emotional intelligence when it comes to navigating success.

Smooch Repovich Reynolds will share her impassioned insights about why keen self-awareness and self-esteem are essential to having a successful career. For women and people of color, it's especially important to set goals, have the self-empowered belief to achieve them, and to know when those achievements are being recognized (and when they aren't).

In this motivational closing session to our conference, Smooch will provide thoughts and insights about defining success in ambiguous times and how leaning into success by knowing one's self is paramount.

[Smooch Repovich Reynolds, managing partner, global IR practice group, ZRG Partners](#)

## 3.00 pm **Summary and end of event**

[Ben Ashwell, editor, Corporate Secretary and IR Magazine](#)

## Partners

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