



IR Magazine Global Forum & Awards 2019

Wednesday, October 2 – Thursday, October 3, 2019

Paris Marriott Champs Elysees Hotel, France

Agenda - Wednesday, October 2

- 8.15 am **Breakfast and registration**
- 8.45 am **Opening remarks: Welcome to the Global Forum**
Laurie Havelock, editor-at-large, *IR Magazine*
- 9.00 am **Changes impacting investment funds and where IR should focus its targeting efforts**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Karen Bodner, head of global investor relations advisory, BNY Mellon
- 9.20 am **Building 'C-suite worthy' respect and trust through your targeting activities**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Karen Bodner, head of global investor relations advisory, BNY Mellon
Manuel Taverne, director of investor relations, FACC
William Wang, director of IR, M&A and investments, Chinasoft International
- 10.00 am **Morning coffee break**
- 10.30 am **The changing research dynamics between the buy side, the sell side and corporates**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Adam Borgatti, senior vice president of corporate development and investor relations, Aeon
Richard Segal, senior investment analyst, Manulife Asset Management
- 11.30 am **How IR should operate with more direct engagement**
Moderator: Ian Matheson, chief executive, Australasian Investor Relations Association (AIRA)
Timothy Leveridge, vice president and investor relations officer, The Coca-Cola Company
Michael Miller, director of investor relations advisory, IHS Markit
James Wong, corporate access, Millennium Management
- 12.30 pm **Lunch**
- 1.30 pm **When will the rise in ESG represent a meaningful share of buy and sell decisions?**
Moderator: Marisa Baldo, director, Brunswick Group
Rosanna Burcheri, portfolio manager, Artemis Investment Management
- 2.10 pm **Getting started on your ESG journey: Setting goals and getting the message across.**
Brian Rafferty, co-founder and managing director, Taylor Rafferty
- 2.30 pm **Communicating on climate: How does the next generation of investors view your business risks?**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Marie-Sybille Connan, senior ESG analyst, Allianz Global Investors
Henrik Jeppesen, head of investor outreach, Carbon Tracker
Philip Vernardis, vice president of corporate governance, State Street Global Advisors
- 3.15 pm **Afternoon coffee break**
- 3.30 pm **Governance briefing: The changing nature of disclosure, transparency and shareholder rights**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Gary LaBranche, president and chief executive officer, NIRI
Mary Throop, partner, Summerhill Capital Management
- 4.15 pm **Preparing for a rise in activism: A case study**
Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Jean-Benoit Rocquette, head of investor relations, Ubisoft
- 4.45 pm **Summary of discussions**
Laurie Havelock, editor-at-large, *IR Magazine*
- 5.00 pm **The Global Top 50 awards presentation**
- 5.30 pm **Networking drinks reception sponsored by zebra**

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Agenda - Thursday, October 3

- 8.30 am **Breakfast and registration**
- 9.00 am **A view from the top: Fireside chat with Kurt Kuehn, Former CFO at UPS**
Moderator: Laurie Havelock, editor-at-large, IR Magazine
Kurt Kuehn, former chief financial officer and board member, UPS and the Sustainability Accounting Standards Board
- 9.25 am **Impact of new technologies and digitalization on investor relations**
Moderator: Laurie Havelock, editor-at-large, IR Magazine
Viviane Joynes, managing director, EQS Group
- 9.45 am **How alternative data informs investment decisions and the impact of artificial intelligence on IR**
Moderator: Laurie Havelock, editor-at-large, IR Magazine
Daniel Nye, chief investment officer, Swiftsure Partners
Ole Sæberg, board member and advisor, dvice Capital Vision Fund
- 10.30 am **Morning coffee break**
- 11.00 am **How you can incorporate quant investors and exchange traded funds into your IR strategy**
Moderator: Laurie Havelock, editor-at-large, IR Magazine
Jordan Alloun, quant equity research portfolio manager and partner, VIA Asset Management
Richard Lacaille, global chief investment officer, State Street Global Advisors
- 12.00 noon **Lunch**
- 1.00 pm **Fund focus: What do the buy-side most value from an IR team?**
Moderator: Laurie Havelock, editor-at-large, IR Magazine
Rosanna Burcheri, portfolio manager, Artemis Investment Management
Lorenzo Crispoltoni, senior portfolio manager and head of equity & alternative investments, Fideuram
Kevin Elliott, partner, Summerhill Capital Management

- 1.45 pm **Closing keynote: The future of investor relations and the DNA of a successful IR Officer**
Smooch Repovich Reynolds, managing partner and leader of the global IRO and CCO practice, ZRG Partners
- 2.15 pm **Wrap-up and end of forum**
Laurie Havelock, editor-at-large, IR Magazine

2019 EVENTS CALENDAR

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| ESG Integration Forum – Europe
Thursday, November 7
London, UK | IR Magazine Forum & Awards – South East Asia
Tuesday, December 3
Singapore |
| IR Magazine Forum – Women in IR Europe
Tuesday, November 12
London, UK | ESG Integration Forum – US
Thursday, December 5
New York, US |
| IR Magazine Awards – Brazil
Tuesday, November 12
São Paulo, Brazil | IR Magazine Forum & Awards – Greater China
Friday, December 6
Hong Kong |

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