



# IR MAGAZINE THINK TANK WEST COAST

Exclusively for heads of IR  
Wednesday, March 23, 2022  
In-person event: El Prado Hotel, Palo Alto

## FORMAT

Our unique think tank format means you can exchange practical advice on IR's most significant issues.

**Short-and-sharp panel briefings** provide context on what is happening in the world of investor relations, **followed by structured roundtable discussions** in a closed environment that allows you to speak frankly and honestly about your challenges and share best practices with other heads of IR.

## AGENDA

All times are in PT (Pacific Time)

**8.00 am**     **Registration, refreshments and networking**

**9.00 am**     **Welcome to the IR Magazine Think Tank**

James Beech, editor in chief, *IR Magazine*

**9.15 am**     **Trends to look out and prepare for in 2022: The rise of M&A and shareholder activism**

We will kick off our day of in-depth discussions with senior heads of IR with this keynote panel discussion on the macro **trends affecting public companies**. The session will set the scene with an update on developments in M&A activity, trends in shareholder activism and how IR teams can prepare for what is to come in 2022.

Join us to keep your finger on the pulse, **understand the impact of recent events** on the role of IR, and get a top-down perspective on the long-term effects of the pandemic.

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

Adam Frederick, global president, Morrow Sodali

Derek Zaba, co-head of shareholder activism and corporate defense practice, Sidley

**9.45 am**     **Delivering holistic, year-round ESG communications**

Our first panel of the day is creating a **comprehensive engagement strategy** that effectively communicates the risks and opportunities that are material to your business. We will discuss **ESG trends for 2022**, proxy season findings, the changing nature of reporting, consolidation of frameworks, **SEC disclosure requirements and investor expectations** around the depth and frequency of ESG-related communications.



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Moderator: Steve Wade, head of event content, *IR Magazine*  
Katrina Rymill, SVP of corporate finance and sustainability, Equinix  
Chad Spitler, CEO and founder, Third Economy  
Sam Wallace, analyst, sector lead, technology and communications, Value Reporting Foundation

## 10.15 am Roundtables: Discuss team structure and ESG best practices with heads of IR

It can be challenging to keep on top of ESG alongside existing IR responsibilities. We'll discuss the **options for supporting and resourcing the IR team** and strategies to deliver a concise ESG story that **communicates long-term value creation** to investors and wider stakeholders.

## 10.45 am Coffee break

## 11.00 am Targeting the right investors in a post-pandemic world

This panel will **discuss innovative and new ways** of targeting potential investors as the world adjusts to another new normal. What are the best tools and resources available to identify and **attract the right investors?** What opportunities created by the pandemic can help **'globalize' your shareholder base?**

We'll explore new ways to **secure additional sell-side coverage**, weigh up the pros and cons of paid analyst coverage, social media, cold calling and digital strategies, and any **new corporate access trends** to be aware of in 2022.

Moderator: Steve Wade, head of event content, *IR Magazine*  
Peter Salkowski, vice president of investor relations, Fortinet  
Greg Secord, vice president of investor relations, Open Text Corporation  
Lance Spacek, head of corporate access, Wells Fargo

## 11.30 am Roundtables: Managing sell-side dynamics and buy-side corporate access teams

During these structured roundtables, heads of IR will share practical tips that have helped improve the **effectiveness of their targeting process** in the past 12 months. We'll discuss ways to manage the **changing sell-side dynamics**, work better with buy-side corporate access teams, and the nuances of going on the road in new markets.

## 12.00 pm Investor messaging, next-gen IR meetings and digital strategies: Engaging institutional and retail investors



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In another forward-planning session, we will explore how IR marketing calendars are evolving, how to **approach specific investor touch-points** and make every meeting matter.

We'll talk through investor sentiment around in-person vs virtual events, the optimal blend of formats for various IR engagements and how to **create impactful investor days**. We'll also explore **top tips to maximize the use of management's time**, best practice shareholder communication strategies, concise messaging, which medium delivers that message best, **frequency of communications** and where IR fits into social media marketing and monitoring.

Get data-driven insight into how IR teams approach investor engagement in a post-pandemic era. We'll also cover how to **manage inbound retail investor questions** and shape a strategic narrative for investors and analysts.

Moderator: Steve Wade, head of event content, *IR Magazine*  
Seth Frank, vice president of investor relations, Evolent Health  
Victoria Hyde-Dunn, vice president of investor relations, Informatica  
Linda Pazin, director of strategic communications, Sempra  
Rachael Zahn, vice president of marketing and partnerships, Investis Digital

**12.45 pm Lunch**

**1.45 pm Roundtables: Compare company strategies for hybrid meetings and investor messaging**

We will be using the interactive format to talk through how IR teams are approaching their marketing activities and how you can **prepare for the transition** back to in-person meetings while making the most of virtual interactions. We'll discuss **lessons learned, challenges faced**, picking up on non-verbal communication/body language and turning virtual meeting data into actions. Attendees can take inspiration from the companies leading the way with new tech and digital methods.

**2.15 pm The evolving strategic importance of an IRO and a well-structured team in 2022**

As companies are figuring out the right balance between the **efficiency of remote working** and the **value of face-to-face**, it is crucial to discuss the expectations and **skills required of IROs** going forward. We'll explore how the culture of IR is fundamentally changing, new career pathways that are emerging, **how to run an IR team**, what CFOs expect from IR teams, how to manage up and **coach your c-suite**, and emerging best practices.

Moderator: James Beech, editor in chief, *IR Magazine*  
Friederike Edelmann, vice president of investor relations, Central Garden & Pet  
Joon Huh, vice president of finance, IR and treasury, Freshworks



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Myesha Lacy, vice president of investor relations, Arcellx  
Jason Tsai, vice president of investor relations, Zendesk

## 3.00 pm Roundtables: What are you missing?

As capital markets evolve, so does the role of IR and **what is expected of IR teams**. In this quickfire discussion, we'll aim to cover top three tips around bridging the gap in skillset, team structures and how to take the next step in your career.

## 3.15 pm Investor Q&A: Expectations of IR teams in 2022

During this open Q&A session, our **panel of investors will address any concerns** and questions you may have about the coming months. What do investors want from IR in a hybrid world? Are investors tired of virtual events? What **sectors are investors favouring going into 2022**? How optimistic are panellists about the opening up of the economy? What are the expectations around the **depth and frequency of ESG communications**? What can IR teams do better as we emerge from the pandemic?

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

Kristin Hull, founder and CEO, Nia Impact Capital

Lloyd Kurtz, senior portfolio manager, Wells Fargo Wealth and Investment Management

John Walcott, portfolio manager, Point72

## 4.00 pm Closing remarks and summary

James Beech, editor in chief, *IR Magazine*

## 4.15 pm Drinks reception

## 6.00 pm End of the event