



IR MAGAZINE THINK TANK – WEST COAST

Wednesday, March 20, 2024
el Prado Hotel, Palo Alto, CA

FORMAT

Our unique think tank format lets you 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.

Join us to keep your finger on the pulse and **understand the impact of recent events** on the role of IR.

AGENDA

This event is in-person only. All times are in PT (Pacific Time)

8.15 am **Registration, refreshments and networking**

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

Steven Wade, Head of content, *IR Magazine*

9.00 am **Keynote panel: Management expectations of IR in 2024**

- C-suite perspectives on the evolving strategic importance of IR and the value a strong IR team can bring in 2024
- Understand the impact of the current environment on the role and responsibilities of IR teams
- Foster strong relationships within senior management and embed IR in the decision-making process
- Advice on communicating management change to risk-averse markets

Moderator: Steven Wade, Head of content, *IR Magazine*
Kate Scolnik, Chief financial officer, Owlet Baby Care

9.30 am **The analyst view: The impact on macro uncertainty on corporate access**

- Hear directly from the sell side about the impact of macro uncertainty on consumer behaviour, investment flows and shareholder bases
- Discover how IR teams can work with their analysts to better inform the investment community around the equity story
- Understand the impact of Learn how to calibrate your guidance and messaging in uncertain times
- Discuss how to approach corporate access in an uncertain economy



IR MAGAZINE THINK TANK – WEST COAST

Wednesday, March 20, 2024
el Prado Hotel, Palo Alto, CA

Moderator: Lauren McDonald, conference producer, *IR Magazine*
RJ Pellegrino, Managing director of global equities, TD Cowen

10.00 am **Roundtables: Navigating uncertainty and sector-specific discussions**

10.30 am **Coffee break**

11.00 am **Practical uses of AI in IR: How has the conversation progressed?**

- An overview of the key applications of AI currently in use by IR teams
- Best practices around implementing AI processes: From identifying a use-case to selecting the right provider
- Overcoming challenges: Learn the key obstacles to AI adoption by IR teams and understand the evolving risk landscape
- Looking ahead: Discuss where AI could add the most value to IR functions as technologies evolve

Moderator: Lauren McDonald, conference producer, *IR Magazine*
Erik Carlson, CFO & COO, Notified

11.30 am **Best-in-class earnings calls: Preparation, execution and measuring success**

- In advance: How and when to pre-announce results
- On the lead up: Preparing your management team and anticipating analyst queries
- On the day: Discuss tactics and formats to ensure a smooth presentation and Q&A
- After the call: Learn the best ways to measure success and gather analyst feedback

Moderator: Steven Wade, Head of content, *IR Magazine*
Giuseppe Montefinese, Manager of contributor relations - US, Visible Alpha
Jason Schmidt, Head of investor relations, Upstart

12.00 pm **Roundtables: Tools and technologies to drive efficiency in investor relations**

12.30 pm **Lunch**

1.30 pm **Tailoring your outreach to a range of investment styles**

- Get creative with the datasets you use to identify compatible investors
- Next steps: Best practices around initial outreach and ensuring meaningful engagement
- Learn strategies to maximize the productivity of yours and management's time
- Retail investors: Identify, manage and cultivate your retail shareholder base
- Domestic vs global outreach: Factors to consider when approaching international investors

Moderator: Steven Wade, Head of content, *IR Magazine*
Loren Kalm, Head of investor relations, North America, Genentech/Roche
David Whyte, Co-Founder and CEO, Irwin



IR MAGAZINE THINK TANK – WEST COAST

Wednesday, March 20, 2024
el Prado Hotel, Palo Alto, CA

2.00 pm Taking an updated look at investor days: Messaging, cadence and execution

- Set the right message: Knowing when (and when not) to host an investor day
- Get the cadence right: Ensuring a consistent investor day schedule without fatiguing participants
- Who to have involved: Ensuring the right people are in the room and preparing speakers effectively
- Discuss the best investor day formats in a hybrid world
- After the event: Share solutions to measuring the value and impact of your investor day

Moderator: Lauren McDonald, Conference producer, *IR Magazine*
Rob Lockerman, Vice president of advisory, Corbin Advisors
Chip Newcom, Head of investor relations, Equinix

2.30 pm Roundtables: Novel ways to engage investors

3.00 pm Investor Q&A: Buy-side perspectives on how IR can do better in 2024

- Hear directly from the buy-side on the key macro trends likely to shape investment decisions in 2024
- Discuss how different investors are reacting to current market conditions and what this means for IR teams
- Learn the best ways to communicate information to investors in the context of ongoing uncertainty
- Understand investors' red flags when it comes to engaging with IR teams

Moderator: Steven Wade, Head of content, *IR Magazine*
Stephen Perkins, Founder and portfolio manager, Toronado Capital Management

3.30 pm The IR Situation Room

A carefully structured, collaborative session that gives attendees an opportunity to work together to solve each other's real-life IR challenges in a consultation-style setting

- Get real solutions from IR peers on a particular challenge you are facing
- Understand the challenges that other IR professionals are facing
- Benefit from the collective discussions that result

Moderator: Victoria Hyde-Dunn, Vice president of investor relations, Informatica

4.15 pm Closing remarks and networking drinks

Steven Wade, Head of content, *IR Magazine*