



IR MAGAZINE THINK TANK WEST COAST

Exclusively for senior IR professionals
Friday, September 23, 2022
In-person event: El Prado Hotel, Palo Alto

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)

8.00 am **Registration, refreshments and networking**

9.15 am **Welcome to the IR Magazine Think Tank**
Laurence Taylor, senior conference producer, IR Magazine

9.30 am **A global recession: Capital market and macro-economic trends to prepare for in 2023**

We will kick off our day with this view from a **market strategist on the macro trends affecting public companies** in the coming months. The session will set the scene with an update on global markets, fund flows, developments in M&A and activism activity and how IR teams can prepare for what is to come in 2023.

Moderator: Steve Wade, head of event content, IR Magazine
Adam Frederick, global president, Morrow Sodali

10.00 am **A top-down approach to delivering shareholder value**

Given the outlook for the next 18 months, what are the priorities of senior management at a public company, and **what are the expectations of IR teams** to effectively communicate shareholder value? In this panel, we'll share perspectives on the **long-term effects of the pandemic**, preparing for an economic downturn, the role of an IRO within the wider company strategy and how it has changed over the pandemic.

Moderator: Steve Wade, head of event content, IR Magazine
Shanye Hudson, SVP of investor relations and treasury, Seagate Technology
Jill Sawyer, VP of investor relations, Prologis
Roxi Wen, chief financial officer, Invitae



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10.45 am Roundtables: Learnings from the last recession – the role of an IRO

What is the **role of an IRO during a post-pandemic downturn**? How does it compare to the 2008 recession, and what can we learn from those who successfully navigated past market uncertainty? How are companies providing financial guidance during these times? How should you restructure resources when access to capital markets is challenging?

11.15 am Coffee break

11.30 am Revamping ESG engagement strategy to meet increasing investor expectations

Our panel will discuss all things ESG! With the announcement of the newly formed ISSB, SEC climate disclosures and policy, the expectations around the **quality of ESG disclosures**, metrics, reporting and communication have increased significantly. Our panel of experts will discuss how to create a comprehensive engagement strategy that **effectively communicates the risks and opportunities** that are material to your business. We'll also cover upcoming ESG trends, proxy season findings and investor expectations around the depth and frequency of ESG-related communications.

Moderator: Laurence Taylor, senior conference producer, IR Magazine
Catherine Buan, head of IR, sustainability and ESG reporting, Asana
Katie Schmitz Eulitt, director of investor relationships, IFRS Foundation

12.00 pm Roundtables: Team structure to enable holistic, year-round ESG communication

Keeping on top of ESG alongside existing IR responsibilities can be challenging. 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.

12.30 pm Lunch

1.30 pm Targeting the right investors in a hybrid, uncertain market

This panel will **discuss innovative and new ways** of targeting potential investors. What are the best practices around scheduling NDRs and determining which cities are open and which are closed? What tools and resources are 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 the pros and cons of paid analyst coverage, social media, cold calling and digital strategies, and any **recent corporate access trends** to be aware of going into 2023.

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Marty Palka, chief intelligence analyst, investor relations, Cisco Systems
David Whyte, CEO, Irwin

2.00 pm **Creating impactful meetings: Best practices for earnings call, investor days and more**

In another forward-planning session, we share practical advice on how IR marketing calendars are evolving, how to **approach specific investor touch-points**, tailoring content for various audiences, **operational delivery**, and make every meeting matter.

We'll discuss 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, fine-tune your elevator pitch to investors** and manage inbound **retail investor questions**.

Moderator: Laurence Taylor, senior conference producer, IR Magazine
Chip Newcom, director of investor relations, EQUINIX
Linda Pazin, director of strategic communications, Sempra
Karen Sansot, vice president, investor relations, Bill.com

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

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.

3.15 pm **Investor Q&A: Expectations of IR teams during uncertainty in 2023**

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? What are **their predictions for the coming months**? What do they want from companies during a downturn? Are investors tired of virtual events? What **sectors are investors favouring going into 2023**? What are the expectations around the **depth and frequency of ESG communications**?

Moderator: Steve Wade, head of event content, IR Magazine
Aline Avzaradel, equity portfolio manager, Capital Group
Lloyd Kurtz, senior portfolio manager, Wells Fargo Wealth and Investment Management
Mike Seidenberg, lead portfolio manager, Voya Financial

4.00 pm **Closing remarks, drinks reception and networking sponsored by NIRI SV**

Vern Essi, president, NIRI Silicon Valley and VP of IR, Fastly
Steve Wade, head of event content, IR Magazine