



# IR MAGAZINE THINK TANK WEST COAST

Exclusively for senior IR professionals  
Tuesday, September 26, 2023  
Marines' Memorial Club & Hotel, San Francisco

## 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**

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

Laurence Taylor, senior conference producer, IR Magazine

**9.00 am**      **Debate the impact of the anti-ESG movement on how companies communicate their sustainability efforts**

As ESG movement grows and evolves, so too does its opposition. But how significant is the ESG pushback for public companies, and how – if at all – should IR teams respond? Here we will debate whether the anti-ESG movement should be taken into account in your ESG communications, or if doing so risks diluting your sustainability story.

- Discuss the significance of the anti-ESG movement on public companies
- Debate whether IR teams should acknowledge the push back when communicating their sustainability story
- Explore the long-term impacts of ESG opposition on investor relations

Moderator: Lauren McDonald, conference producer, IR Magazine  
Alex Hughes, vice president of investor relations, Guidewire Software  
Mike Rost, senior vice president, corporate development and investor relations, Workiva

**9.30 am**      **ESG Roundtables**

**Communicating your ESG story in today's macro-environment**

**IR Caught in the Middle: When Social Issues Hit Your Company**

T.J. O'Sullivan, managing director, Joele Frank  
Kaitlin Kikalo, managing director, Joele Frank



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## **10.00 am**    **Innovating your outreach with retail investors**

There are now more retail investors trading for themselves than ever before. Yet, despite their growing prevalence, retail investors often find themselves relegated to the sidelines. In this session we will take a deep dive into the value of an effective retail strategy in the current environment, and share advice on how best to communicate, manage and sustain relationships with retail shareholders.

- Understand the benefits of a strong retail strategy in today's environment
- Learn how to fine-tune your marketing to retail investors
- Discuss best practices around managing your retail shareholder base

Moderator: Laurence Taylor, senior conference producer, IR Magazine  
Anil Gupta, vice president, investor relations, Coinbase

## **10.20 am**    **Coffee break**

## **10.40 am**    **Getting better returns on shareholder engagement**

It's been several years since the return to in-person events but the corporate access world has changed dramatically since the pandemic. Here our panellists will discuss the different channels of engagement, how corporate access trends are evolving and how to maximize the efficiency of your outreach.

- Understand the evolving role of the sell-side and buy-side corporate access
- Tailor your engagement to a range of investment styles
- Improve the productivity of yours and management's time on the road

Moderator: Laurence Taylor, senior conference producer, IR Magazine  
Lance Spacek, head of corporate access, Wells Fargo  
Lisa Rubinger, head of corporate relations, Ashler Capital

## **11.10 am**    **Planning and executing a meaningful investor day**

A well-timed investor day is a unique chance to provide a much deeper view into the company's strategy, update investors on the long-term financial framework, provide access to the broader management team and reframe your investment case. In this panel, we'll discuss when and how to put on a successful hybrid event to make the most of this crucial opportunity.

- Setting the tone: Developing the drivers and key message of the event
- Planning: Preparing your executive team and anticipating investor questions
- On the day: Incentivising in-person attendance whilst ensuring an immersive experience for virtual attendees



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Moderator: Lauren McDonald, conference producer, IR Magazine  
Brooke Bakewell, senior manager, investor relations, Salesforce  
Hunter Stenback, senior vice president, strategic situations and investor relations, Edelman Smithfield  
Dave Zbojnowicz, vice president, investor relations, Mattel

## **11.55 pm Targeting and engagement roundtables**

**Reaching the right people in the right way**

**Investor relations in the digital age: The rapidly evolving retail investor landscape**

Matt Joanou, CEO and co-founder, Stakeholder Labs

## **12.25 pm Lunch**

## **1.30 pm Leveraging AI to strengthen the issuer-investor relationship**

In this session our panellists will share their views on how AI is reshaping how IR teams and investors communicate with one another. Learn how investors are using AI to screen stocks, what the implications of this is on IR teams, and how IROs themselves can leverage AI to improve how they approach and communicate with investors.

- Understand what tools are out there and how are people using them
- Learn how investors are integrating AI into their investment strategies
- Discuss how IR teams can stay ahead as AI is increasingly adopted by the buy-side
- Share practical advice on using AI to drive efficiency in investor relations

Moderator: Laurence Taylor, senior conference producer, IR Magazine  
Erik Carlson, COO and CFO, Notified  
Victoria Hyde-Dunn, vice president of investor relations, Informatica

## **2.00 pm 'IR plus': Staying ahead in your career as the role evolves**

The role and perception of IR has changed a lot over the years. IROs now take on diverse responsibilities beyond their traditional functions, reshaping careers, team dynamics, and the profession's future. Here we look at how market and technological trends are impacting the skills needs of future IR professionals, and share tips on growing your career within and beyond IR.

- Getting into IR: Hear how companies are attracting the new generation of IR talent
- Developing your role: Advice for IROs looking to expand and grow their mandate
- Moving up: Give yourself the best chance of being promoted
- Moving out: Explore diverse opportunities beyond IR



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Daniel Amir, vice president, finance and investor relations, ironSource/Unity  
Katrina Rymill, senior vice president, corporate finance and sustainability, Equinix

**2.30 pm Roundtables: Enabling smarter IR teams**

**3.00 pm Afternoon break**

**3.15 pm Buy-side Q&A: Understand investor priorities for 2024**

During this open Q&A session we will address how investors are thinking about the next 12 months, and what they expect from IR teams. This is your chance to engage directly with the buy-side on various topics, including:

- Learn how investor sentiment is changing as we approach 2024
- Discuss the red and green flags investors face when it comes to messaging
- Understand which channels of engagement investors find the most useful

Moderator: Laurence Taylor, senior conference producer, IR Magazine  
Lori Keith, director of research and portfolio manager, Parnassus Investments

**3.40 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

**4.20 pm Closing remarks and cocktail reception**

Laurence Taylor, senior conference producer, IR Magazine