



## Investor Relations, Marketing & Communications Forum 2025 Agenda

**Day 1:** March 26, 2025

**8:00** Registration – Continental Breakfast

**8:05** Pre-conference breakfast meetings

Meeting A

**Investor Relations Career Development**

- Becoming competent through and rank skills needed
- Breaking through the glass ceiling or parallel opportunities
- What is the hiring environment
- Different needs of senior level vs junior level for growth

Meeting B

**Marketing Career Development**

- Becoming competent through and rank skills needed
- Breaking through the glass ceiling or parallel opportunities
- What is the hiring environment
- Different needs of senior level vs junior level for growth

**9:00** Opening remarks & chair's welcome

**09:15** Keynote

**10:05** Leverage new and emerging technologies to foster investor relations

- Building technology solutions vs leveraging technology software
- Hear what tools are available and how (well) they work
- Discuss best practices within technologies and workflows
- Consider AI's limitations and opportunities

**10:55** Networking break

**Affinity Group Meetups**

We're providing space for you to connect with participants who are more like you.

Meet up with a subset of forum participants who have the same challenges and opportunities because they meet the same criterion as you (e.g., similar AUMs, the same asset class, the same department size, etc). These meetups are for open networking and will not be facilitated.



For program information:  
**Brian Anderson**  
[brian.a@pei.group](mailto:brian.a@pei.group)

For sponsorship opportunities:  
**Jimmy Kurtovic**  
[jimmy.k@pei.group](mailto:jimmy.k@pei.group)

For registration queries:  
**Customer Services**  
[customerservice@pei.group](mailto:customerservice@pei.group)

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## Affinity Group Meetup 1    Affinity Group Meetup 2

<b>11:25</b>	<b>Emerging sources of funding: Family offices and multi-family offices</b>	<b>Creative IR and marketing: What's new and different</b>
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|---|--|
| <ul style="list-style-type: none"> <li>US vs global challenges and opportunities</li> <li>Contrast workable approaches for attracting and keeping family office vs multi-family offices</li> <li>Cater to consultants to maximize return on investment</li> </ul> | <ul style="list-style-type: none"> <li>Innovative strategies for communications formats, including video</li> <li>What forums and channels are effective</li> <li>Change over time to use zoom or pre-recording collateral</li> <li>Using video to tell your story</li> <li>Augmenting your pitchbook</li> </ul> |
|---|--|

*Panelists*

- Emily Mason, Managing Director, Head of Investor Relations & Fundraising, Cornell Capital

**12:15      Networking luncheon**

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<b>1:15</b>	<b>Fundraising think tank sessions (GP-Only)</b>	<b>Affinity Group Meetups</b>
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Think tank A

**Creative IR: What's new and different**

- Innovative strategies for communications -formats, including video
- What forums and channels are effective
- Change over time to use zoom or pre-recording collateral
- Augmenting pitchbook with video

Think tank B

**Side letters negotiations and LP requests**

- What terms in side letters are new in past 12 months
- What are LPs asking for
- At what point should IR be in the conversation
- Positioning the offer and working in concert with other functions

**1:15**      Affinity Group Meetup 1

**1:45**      Affinity Group Meetup 2



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2:15	<b>AI: Present use cases and possibilities</b> <ul style="list-style-type: none"> <li>• Precautions that address threats to privacy and security</li> <li>• Leverage opportunities for your team</li> <li>• Diligence tools</li> <li>• Role of AI in background research</li> </ul>	<b>Build and develop your team</b> <ul style="list-style-type: none"> <li>• Compare Inhouse vs agency implications</li> <li>• Implications for building and managing your team if you are a one hub or regional ops firm</li> <li>• Partnering with C-suite for buy-in to value of marketing and IR</li> <li>• Finding the intersection of IR and marketing teams and how collaboration works and doesn't work</li> </ul> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>• Andrew Campbell, Partner, DC Capital Partners</li> <li>• Kathryn Pothier, Partner, Investor Relations, Epiris</li> </ul>	<b>Rise of semi-liquid vehicles in private markets</b> <ul style="list-style-type: none"> <li>• Survey the competitive landscape of semi-liquid funds</li> <li>• identify unique selling points and potential differentiators.</li> <li>• Discuss market trends and investor preferences related to this asset class</li> </ul>
3:05	<b>Networking break</b>	<b>Speaker office hours</b>	
	<p>During Speaker Office Hours meetups, speakers and other participants will meetup to continue the conversations for particularly popular sessions. The sessions that will be supplemented in these meetups are TBD. These sessions will not be facilitated.</p> <p><b>Speaker Office Hours</b></p>	<p><b>Speaker Office Hours</b></p>	
3:35	<b>Working cross-functionally: Win allies and collaborate with sales legal, investing and compliance</b> <ul style="list-style-type: none"> <li>• Fostering collaboration by ensuring and conveying alignment of interests</li> <li>• Convey imperatives and get in step with to C-level other functions</li> <li>• Tips for communicating do's and don'ts</li> </ul>	<b>Storytelling that is authentic and compelling</b> <ul style="list-style-type: none"> <li>• What is the right approach for your firm</li> <li>• What rings true with disparate constituencies</li> </ul>	<b>Expanding and enhancing the due diligence experience during fundraising</b> <ul style="list-style-type: none"> <li>• Use marketing skillsets to translate and position information and incremental materials to LPs</li> <li>• Marketing and IR collaboration</li> </ul>
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- How to manage expectations internally how to
- Address trends in LP expectations for fundraising
- Changing pre-marketing prep and what is standard in your data room

## 4:25 LP Panel: Ongoing communications with investors

- Manage relationships in a slower exit environment
- Keeping investors interested between fundraises
- When and how to communicate differently with LPACs
- Reporting expectations vs. exasperation: how often and what are you reporting
- How ILPA's template may change reporting

Michael Felman, President and CEO, MSF Capital Advisors

## 5:15 20<sup>th</sup> Anniversary Gala

## Day 2: March 27, 2025

## 8:00 Breakfast of Champions

All participants will share one issue they faced, their solution and the outcome. This lively session is sure to be an event favorite.

## 9:00 Keynote

## 9:50 Objective-driven AGMs: Design your program with priorities in mind

- Discuss various objectives of AGMs and tactics for achieving them
- Examine how program facets (content, speakers, activities, etc.) are conducive to AGM objectives
- What pre- and post-AGM communications work
- What activities generate the highest/lowest levels of engagement
- What infrastructure and technologies (layout, venue, timing, apps etc) work and don't work for LPs

## 10:40 Networking break

### Speaker office hours

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**Speaker Office Hours**

**Speaker Office Hours**

<p><b>11:10</b></p>	<p><b>Crisis communications and issues management</b></p>	<p><b>Vet, select and manage placement agents</b></p>	<p><b>Leverage growth areas: Private banks &amp; RIAs</b></p>
	<ul style="list-style-type: none"> <li>• Countering and leveraging influence of social media</li> <li>• Organize with an emphasis on immediacy</li> <li>• Cyber risk management and planning tabletops that are specialized and apart from routine crisis communication</li> <li>• Scenario and contingency planning based on most relevant situations for firm or portfolio companies</li> <li>• Proactive and reactive strategies for ESG and DEI</li> </ul>	<ul style="list-style-type: none"> <li>• How much to give and what work to assign</li> <li>• How to coordinate your collaboration</li> <li>• When do you come in and how do you reference them</li> <li>• Look at benefits or working with or without them</li> <li>• Have a strategy What specific areas do different placement agents have access to</li> </ul> <p>Christina Anzel, Director, Client Team, Generation IM</p>	<ul style="list-style-type: none"> <li>• US vs global challenges and opportunities</li> <li>• Form a presence in this area and how to play it based on fund size and brand</li> <li>• RIA space -why custody reporting and other priorities are important</li> <li>• In wealth management in RIA space is a huge PE</li> <li>• What factors weigh in on whether to put all chips on one RiA manager vs diversifying</li> <li>• How to pitch differently</li> <li>• Scalability: What structure are you using to bring them in and how to service them</li> </ul>
<p><b>12:00</b></p>	<p><b>Networking luncheon</b></p> <p><b>Affinity Group Meetups</b></p> <p>We're providing space for you to connect with participants who are more like you.</p> <p>Meet up with a subset of forum participants who have the same challenges and opportunities because they meet the same criterion as you (e.g., similar AUMs, the same asset class, the same department size, etc). These meetups are for open networking and will not be facilitated.</p>		
<p><b>1:00</b></p>	<p><b>Navigating the backlash and regional nuances to ESG and DEI</b></p>	<p><b>Strategies that resonate with institutional investors in a slow exit environment</b></p>	<p><b>Differentiate your brand for fundraising and recruiting</b></p>



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- Look at the growing movement toward Responsible Innovation
- Navigating LP relationships when you invest in controversial industries
- Conveying the financial advantages of DEI and ESG
- Tailor your messaging without compromising your integrity
- Evolution and growth of the secondary market
- Speak to alignment of interests and inherent conflicts
- Deliver value when performance isn't strong
- What rights do LPs have in the continuation vehicle process
- Challenges that LPs face and how GPs can mitigate them
- Retail strategies for making your brand appeal in retail to HNW and mass affluent
- Branding to resonate across various stakeholder groups
- Refresh or tweak your brand
- Update on Marketing Rule regulations for exempt and non-exempt

Roseita Monteiro, Principal  
Investor Relations, Collier Capital

Kareen Laton, Managing Director,  
Head of Investor Relations,  
NovaQuest Capital Management

1:55

## Messaging matters: Technologies and providers that deliver

- Look into which technologies best deliver and amplify your message
- Cost benefit analysis
- Security concerns
- Implementation
- What is a common mistake made by GPs in incorporating tech into their strategy

2:45

## End of conference



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