Private Equity International

Investor Relations, Marketing & Communications Forum New York 2025

20th Anniversary

Keynote

Tom Eckersley, Head of Marketing, Hg

Speakers

Christina Anzel, Director, Client Team, Generation IM
Mary Armstrong, Global Head of Marketing & Communications, General Atlantic
Caitlin Brodie, Managing Director, The Carlyle Group
Andrew Campbell, Partner, DC Capital Partners
Michele Chow-Tai, Managing Director, Business Development, Fairview Capital Partners
Rushana Cypert, Vice President, Investor Relations, The Capstreet Group
Sean Cumiskey, Head of Investor Relations, Omega Funds
Shernaz Daver, Operating Partner, Khosla and Company
Jenny Delaney, Head of Investor Relations for Equity Private Markets, Blackrock
Lindsay DeLarme, Managing Director, Head of Corporate Communications & Branding, Oaktree Capital
Irene Hong Edwards, Partner, Head of Investor Relations, Lovell Minnick Partners
David Fann, Senior Managing Director, Head of Investor Relations, VSS Capital Partners
Laura Fahrney, Partner, Investor Relations, Ridgemont Equity Partners
Michael Felman, President and CEO, MSF Capital Advisors
Colleen Floberg, Principal - Capital Formation & Business Development, GI Partners
Lauren Gruchy, Field Events Manager, Georgian
Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors
Amanda Heravi, Managing Director, Head of IR & Director of ESG, Avista Healthcare Partners
Leslie Hill, Partner, Chief Operating Officer of Global Capital Formation, Sagard
Mac Hofeditz, Managing Director, Vector Capital Management
Priya Karkar, Managing Director, Investor Relations and Business Development, Kline Hill Partners
Kareen Laton, Managing Director, Head of Investor Relations, NovaQuest Capital Management
Emily Mason, Managing Director, Head of Investor Relations & Fundraising, Cornell Capital
Amrita Mainthia, VP, Investor Relations, General Catalyst
David Martus, Managing Director of Investor Relations, GSSG Solar
Roseita Monteiro, Principal Investor Relations, Coller Capital
Caroline Page, Partner, HighVista Strategies
Kathryn Pothier, Partner, Investor Relations, Epiris
Alia Rafi, Principal, Investor Relations and Fundraising, FTV Capital
Jennifer Rogg, Managing Director - Head of Investor Relations, Dunes Point Capital
Jim Rutherford, Co-Founder and Partner, Head of Investor Relations, BharCap Partners
Catherine Saunders, Managing Director, Business Development, Benefit Street Partners
Parag Shah, Head of Marketing, Arena Investors
Susan Stella, Head of Investor Relations and IR, Activate Capital
Erica Sunkin, Director of Communications, New Enterprise Associates (NEA)
James Varela, Partner, Head of Middle East, Rede Partners
Elizabeth Yates, Investor Relations and Fundraising (Head of Americas), Thoma Bravo

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Investor Relations, Marketing & Communications Forum 2025 Agenda

Day 1: March 26, 2025

8:00 **Registration – Continental Breakfast**

8:05 **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
- What is the appropriate compensation
- 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
- What is the appropriate compensation
- Different needs of senior level vs junior level for growth

Panelists

Lauren Gruchy, Field Events Manager, Georgian

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

09:15 **Keynote**

Tom Eckersley, Head of Marketing, Hg

10:00 **Leverage new and emerging technologies**

- 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
- What are the things that GPs want from technology
- How firm size impacts and resources impact technology
- What technologies are evolving

Panelists

- Laura Fahrney, Partner, Investor Relations, Ridgemont Equity Partners

10:50 **Networking break**

11:20 **Emerging sources of funding: Family offices and multi-family offices**

- US vs global challenges and opportunities
- Contrast workable approaches for attracting and keeping family office vs multi-family offices
- Cater to consultants to maximize return on investment

Panelists

- Emily Mason, Managing Director, Head of Investor Relations & Fundraising, Cornell Capital
- Leslie Hill, Partner, Chief Operating Officer of Global Capital Formation, Sagard

Creative IR and marketing: 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
- Using video to tell your story
- Augmenting your pitchbook

12:10 **Networking luncheon**

1:10 **Think tanks**

GP-only gatherings for candid discussions in a closed-door setting. Join your peers for candid discussions in a closed-door setting, with no media, vendors, or service providers in the room.

Think tank A

Communication strategies to develop and protect your relationships

- Identify communication dos and don'ts
- Discuss messaging fundamentals
- What is the key to crisis messaging
- Utilizing new technology and subscription models
- Compare the strategies for gaining traction to differentiate that are employed by small departments vs. large departments

Co-facilitator
Rushana Cypert, Vice President, Investor Relations, The Capstreet Group

Think tank B

Expanding and enhancing the due diligence experience during fundraising

- Marketing and IR collaboration
- 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

Co-facilitator
David Martus, Managing Director of Investor Relations, GSSG Solar

2:15

AI: Present use cases and possibilities

- Precautions that address threats to privacy and security
- Leverage opportunities for your team
- Diligence tools
- Role of AI in background research
- How test it and assess the benefits of using it

Build and develop your team

- Compare inhouse vs agency implications
- Where are you looking to hire, including specialization areas
- Implications for building and managing your team if you are a one hub or regional ops firm
- Partnering with C-suite for buy-in to value of marketing and IR
- How do you structure your team
- Finding the intersection of IR and marketing teams and how collaboration works and doesn't work

Panelists

- Andrew Campbell, Partner, DC Capital Partners
- Kathryn Pothier, Partner, Investor Relations, Epiris

Rise of semi-liquid vehicles in private markets

- Survey the competitive landscape of semi-liquid funds
- identify unique selling points and potential differentiators.
- Discuss market trends and investor preferences related to this asset class
- Use of technology for IR workflow

Panelists

- Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors
- Catherine Saunders, Managing Director, Business Development, Benefit Street Partners

3:05

Networking break

Speaker office hours

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.

3:35

Working cross-functionally: Win allies and collaborate with sales legal, investing and compliance

- Fostering collaboration by ensuring and conveying alignment of interests

Storytelling that is authentic and compelling

- What is the right approach for your firm

Side letter negotiations and LP requests

- What terms in side letters are new in past 12 months

- Convey imperatives and get in step with to C-level other functions
- Tips for communicating do's and don'ts
- Practical approaches for when your facing roadblocks
- Investigate internal processes for how conducive they are for collaboration

Panelists

- Colleen Floberg, Principal - Capital Formation & Business Development, GI Partners

- What rings true with disparate constituencies
- Importance of tailoring message length and channel(s) used based on audience
- Best-in-class though leadership: Owned content and digital in storytelling

Panelists

- Jennifer Rogg, Managing Director - Head of Investor Relations, Dunes Point Capital
- Erica Sunkin, Director of Communications, New Enterprise Associates (NEA)

- What are LPs asking for
- At what point should IR be in the conversation
- Manage your internal constituency and manage your fund law firm
- Work in concert with other functions
- Use marketing skillsets to translate and position information and incremental materials to LPs

Panelists

- Parag Shah, Head of Marketing, Arena Investors
- Jim Rutherford, Co-Founder and Partner, Head of Investor Relations, BharCap Partners

4:30 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*

Moderator
Amrita Mainthia, VP, Investor Relations, General Catalyst

Panelists
Michael Felman, President and CEO, MSF Capital Advisors

5:20 20th Anniversary Gala

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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

Panelists

- Irene Hong Edwards, Partner, Head of Investor Relations, Lovell Minnick Partners

10:40 **Networking break**

Speaker office hours
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Speaker Office Hours **Speaker Office Hours**

11:10	Crisis communications and issues management	Vet, select and manage placement agents	Leverage growth areas: Private banks & RIAs

- Countering and leveraging influence of social media
- Organize with an emphasis on immediacy
- Cyber risk management and planning tabletops that are specialized and apart from routine crisis communication
- Scenario and contingency planning based on most relevant situations for firm or portfolio companies
- Proactive and reactive strategies for ESG and DEI

- How the placement agent landscape has changed and how does it impact selection and
- What is the role of placement agents and how does firm maturity affect this
- How much to give and what work to assign
- How to coordinate your collaboration
- When do you come in and how do you reference them
- Look at benefits or working with or without them
- What specific areas do different placement agents have access to

Moderator
James Varela, Partner, Head of Middle East, Rede Partners

Panelists
- Christina Anzel, Director, Client Team, Generation IM
- Mac Hofeditz, Managing Director, Vector Capital Management

- US vs global challenges and opportunities
- Form a presence in this area and how to play it based on fund size and brand
- RIA space -why custody reporting and other priorities are important
- In wealth management in RIA space is a huge PE
- What factors weigh in on whether to put all chips on one RIA manager vs diversifying
- How to pitch differently
- Scalability: What structure are you using to bring them in and how to service them

Moderator
Sean Cumiskey, Head of Investor Relations, Omega Funds

12:00 **Networking luncheon**

1:00

Navigating the backlash and regional nuances to ESG and DEI

- Look at the growing movement toward Responsible Innovation

Strategies that resonate with institutional investors in a slow exit environment

- Evolution and growth of the secondary market
- Speak to alignment of interests and inherent conflicts

Messaging matters: Technologies and providers that deliver

- Look into which technologies best deliver and amplify your message
- Think about your cost benefit analysis

- Navigating LP relationships when you invest in controversial industries
- Conveying the financial advantages of DEI and ESG
- Tailor your messaging without compromising your integrity

Panelists
- Michele Chow-Tai Managing Director, Business Development, Fairview Capital Partners
- Amanda Heravi, Managing Director, Head of Investor Relations & Director of ESG, Avista Healthcare Partners

- 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

Moderator
Caroline Page, Partner, HighVista Strategies
Panelists
- Roseita Monteiro, Principal Investor Relations, Coller Capital
- Kareen Laton, Managing Director, Head of Investor Relations, NovaQuest Capital Management
- Priya Karkar, Managing Director, Investor Relations and Business Development, Kline Hill Partners
- David Fann, Senior Managing Director, Head of Investor Relations, VSS Capital Partners

- Consider security concerns
- What is a common mistake made by GPs in incorporating tech into their strategy

1:55 **Differentiate your brand for fundraising and recruiting**

- 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

2:45 **End of conference**