

# New York Forum



## 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 & 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, Collier 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  
Sarah Smith, Partner, Limited Partner Services, Advent International  
Susan Stella, Head of Investor Relations and IR, Activate Capital  
Erica Sunkin, Director of Communications, New Enterprise Associates (NEA)  
Betsy Sylvester, Managing Director, Head of Client Management, Castlelake  
Brad Thawley, Partner, Limited Partner Relations, New Enterprise Associates (NEA)  
James Varela, Partner, Head of Middle East, Rede Partners  
Elizabeth Yates, Senior Director, Investor Relations and Head of Americas, Thoma Bravo  
Allison Yazel, Vice President, Marketing, Manna Tree Partners



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## 2025 Agenda

**Day 1:** March 26, 2025

**8:00 Registration and Breakfast**

**8:10 Interactive Breakfast Discussions**

**Meeting A**

**Investor Relations career development**

- What is appropriate compensation?
- Become proficient and rank skills needed
- Break 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**

- What is appropriate compensation?
- Become proficient and rank skills needed
- Break through the glass ceiling or parallel opportunities
- What is the hiring environment?
- Different needs of senior level vs junior level for growth

*Panelists*

Lauren Gruchy, Field Events Manager, Georgian

**9:00 Welcoming remarks**

**Chair opening**

**09:15 Keynote**

**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



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**10:45**      **Networking break**

**11:15**      **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
- What forums and channels are effective
- Change over time to use zoom or pre-recording collateral
- Use video to tell your story
- Augmenting your pitchbook

**12:00**      **Luncheon**

**1:00**      **Think tanks**

*GP-only gatherings for candid discussions in a closed-door setting without any 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

*Co-facilitator*

Rushana Cypert, Vice President, Investor Relations, The Capstreet Group

**Think tank B**

**Expand and enhance the due diligence experience during fundraising**

- Use marketing skillsets to translate and position information and incremental materials to LPs
- Marketing and IR collaboration
- How to manage expectations internally
- Address trends in LP expectations for fundraising
- Changing pre-marketing prep and what is standard in your data room

*Co-facilitators*

David Martus, Managing Director of Investor Relations, GSSG Solar  
Betsy Sylvester, Managing Director, Head of Client Management, Castlelake



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1:55	AI: Present use cases and possibilities	Build and develop your team	Rise of semi-liquid vehicles in private markets
	<ul style="list-style-type: none"> <li>Where to start</li> <li>How to test it and conduct assessments</li> <li>What are the benefits of using it and how do you measure success</li> <li>What third parties are people using</li> <li>Precautions to address threats to privacy and security</li> <li>Leverage opportunities for your team</li> <li>Role of AI in background research</li> </ul> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>Brad Thawley, Partner, Limited Partner Relations, New Enterprise Associates (NEA)</li> </ul>	<ul style="list-style-type: none"> <li>Compare inhouse vs agency implications</li> <li>Where are you looking to hire, including specialization areas</li> <li>Implications for building and managing your team if you are a one hub or regional ops firm</li> <li>Get C-suite buy-in to procure investment in and resources</li> <li>Tailor your team structure</li> <li>Find the intersection of IR and marketing teams</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>	<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> <li>Use of technology for IR workflow</li> </ul> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors</li> <li>Catherine Saunders, Managing Director, Business Development, Benefit Street Partners</li> </ul>
2:45	<b>Networking break</b>		
2:45	<p><b>Speaker office hours</b></p> <p>During Speaker Office Hours, speakers and other participants will meet up to continue the conversations for particularly popular sessions. The sessions that will be supplemented in these meet ups are TBD. These sessions will not be facilitated.</p> <p>Investor Relations Network members only</p>		



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3:15

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

- Fostering collaboration by ensuring and conveying alignment of interests
- 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

## Storytelling that is authentic and compelling

- What is the right approach for your firm
- What rings true with disparate constituencies
- Importance of tailoring message length and channel(s) used based on audience
- Best-in-class thought leadership: Owned content and digital storytelling

### Panelists

- Jennifer Rogg, Managing Director - Head of Investor Relations, Dunes Point Capital
- Erica Sunkin, Director of Communications, New Enterprise Associates (NEA)
- Allison Yazel, Vice President, Marketing, Manna Tree Partners

## Side letter 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
- 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

4:10

## 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



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## 5:00 20<sup>th</sup> Anniversary Gala & Awards Ceremony

This year marks two exciting milestones—the 20<sup>th</sup> anniversary of the investor relations forum and the launch of our Investor Relations Network. It's an evening to reflect on the journey, celebrate shared achievements, and look ahead to the next chapter of innovation.

The gala will kick off with a toast and awards ceremony to honor leaders who have defined and continue to define a standard of excellence. Our awards ceremony will spotlight outstanding professionals whose vision, creativity, and commitment have transformed the private fund investor relations and marketing landscape. From pioneering marketing strategies to groundbreaking investor relations practices, these honorees have set the bar high for the entire industry.

Their commitment to advancing the industry has been and is essential to the success of this community, and we'll take this opportunity to thank them for their ongoing support.

Join us for an unforgettable evening of networking and recognizing trailblazers in the industry.



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**Day 2:** March 27, 2025

**8:00** **Breakfast**

**8:10** **Breakfast of Champions**

*Problem Solving Potluck: Real Challenges, Real Solutions, Better Outcomes*

With an emphasis on real-world experiences and solutions, this lively session is sure to be a favorite—providing invaluable takeaways from the shared expertise of industry professionals.

Every attendee shares one issue they faced, their solution and the outcome. Pre-registration will be required. You will walk away with actionable insights and practical strategies you can use to improve outcomes.

Hear the most pressing challenges your peers have faced, their innovative solutions and their outcomes. Whether it's navigating investor communications during a market downturn, refining marketing strategies to attract the right investors, or tackling complex compliance issues around fund promotions, this session offers a unique opportunity for peer-to-peer exchange.

This event is for Investor Relations Network members only. Pre-registration will be required.

**9:10** **Opening remarks**

**9:15** **Keynote Fireside Chat: Marketing matters: Brand evolution during market revolution**

- The opportunities and the growing pains: Challenges and prospects related to rapid growth
- Lessons learned from brand strategy evolution and 'rebrands'
- What does brand mean in private markets – how do you evoke a positive and accurate representation of your firm
- Moving targets: what's key to marketing for origination vs fund raising vs more general reputation management
- How to scale a team
- The intersection of marketing, sales, and wider stakeholder engagement
- What's the next frontier for this ever-emerging function in private capital

*Keynote*

Tom Eckersley, Head of Marketing, Hg



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**10:00**

**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 for LPs

*Panelists*

- Irene Hong Edwards, Partner, Head of Investor Relations, Lovell Minnick Partners
- Sarah Smith, Partner, Limited Partner Services, Advent International

**10:50**

**Networking break**

**10:50**

**Speaker office hours**

During Speaker Office Hours, speakers and other participants will meet up to continue the conversations for particularly popular sessions. The sessions that will be supplemented in these meet ups are TBD. These sessions will not be facilitated Investor Relations Network members only

**11:20**

**Crisis communications and issues management**

- Counter and leverage the 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 your firm or portfolio companies
- Proactive and reactive strategies for ESG and DEI

**Vet, select and manage placement agents**

- How the placement agent landscape has changed and how it impacts selection
- 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 of working with or without them
- What specific areas do different placement agents have access to

**Leverage growth areas: Private banks & RIAs**

- 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
- 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



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*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

*Moderator*

Sean Cumiskey, Head of Investor Relations, Omega Funds

**12:10 Networking luncheon**

**1:10**

<b>Navigating the backlash and regional nuances to ESG and DEI</b>	<b>Strategies that resonate with institutional investors in a slow exit environment</b>	<b>Messaging: Technologies and providers that deliver</b>
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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

*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

- 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

*Moderator*

Caroline Page, Partner, HighVista Strategies

*Panelists*

- Roseita Monteiro, Principal Investor Relations, Coller Capital
- Karen 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

- Look into which technologies best deliver and amplify your message
- Think about your cost benefit analysis
- Consider security concerns
- What is a common mistake made by GPs in incorporating tech into their strategy



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2:05

## Differentiate your brand for fundraising and recruiting

- Retail strategies for making your brand appeal in retail to HNW and mass affluent people
- Branding to resonate across various stakeholder groups
- Refresh or tweak your brand
- Update on Marketing Rule regulations for exempt and non-exempt

2:55

## Hear the results of PEI's investor relations and marketing compensation survey.

Discover the latest figures in compensation for 2024 across functional areas, AUM, seniority levels, geographies and more

3:15

## End of Conference



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