

# New York Forum

## Celebrating 20 years of fundraising solutions

Join the premiere network of IR and marketing professionals in private markets



**Tom Eckersley**  
Head of Marketing  
**Hg**



**Kristin Custar**  
Partner,  
Head of the Global Investor  
Capital Group  
**The Jordan Company**



**Melissa Cameron**  
Head of Marketing Europe  
and Asia  
**Advent**



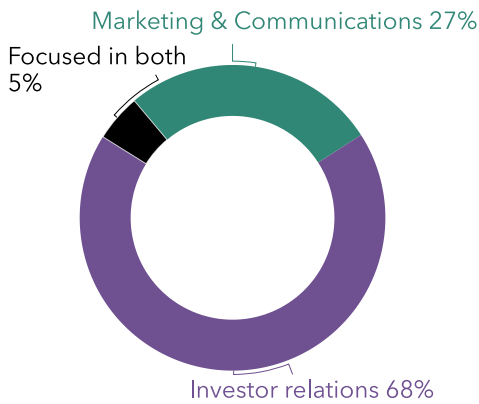
Navigate a changing fundraising landscape alongside **250+ IR and marketing professionals** in New York City this March 26-27.

With an **expert speaking faculty** and **ample networking opportunities**, you'll leave with **refreshed strategies** to engage new investors, nurture existing relationships, revamp your brand appeal, and more.

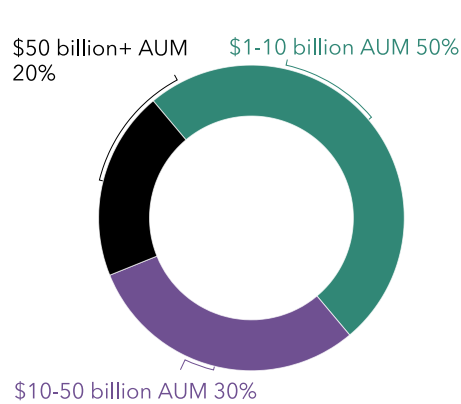
# Become a founding member of the Investor Relations Network

Access a year-round, exclusive community designed to elevate private markets professionals through continuous support, connections, and insights

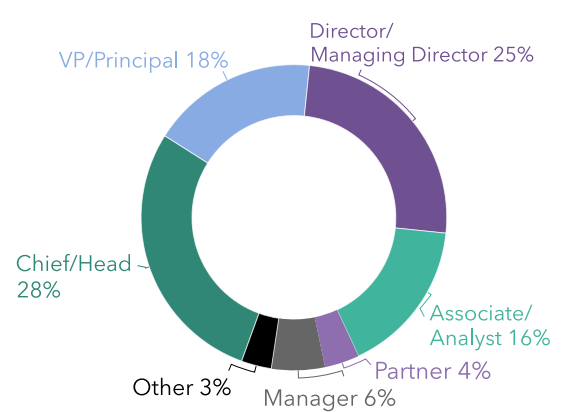
Attendees by job focus



Attendees by firm size



Attendees by job level



## Start your Network experience at the New York Forum

- **NEW** Continue conversations with expert panelists during speaker office hours
- **NEW** Solve shared challenges in a collaborative breakfast discussion
- Discuss specific topics in closed-door think tanks, exclusively for GPs
- Celebrate our rich history at the 20th anniversary gala
- Expand your professional network during networking lunches and coffee breaks



# Drive success at your firm

Hear practical guidance from expert speakers, including:



**Susan Stella**  
Head of Investor Relations  
and IR  
**Activate Capital**



**Kathryn Pothier**  
Partner, Investor Relations  
**Epiris**



**Jim Rutherford**  
Co-Founder and Partner,  
Head of Investor Relations  
**BharCap Partners**



**Mary Armstrong**  
Managing Director, Global  
Head of Marketing &  
Communications  
**General Atlantic**



**Emily Mason**  
Head of Investor Relations &  
Fundraising  
**Cornell Capital**



**Shernaz Daver**  
Operating Partner  
**Khosla and Company SF**



**Andrew J. Campbell**  
Partner, Investment  
Committee Member &  
Investor Relationships  
**DC Capital Partners, LLC**



**Caitlin Brodi**  
Managing Director  
**The Carlyle Group**



[View the full agenda](#)



# New York Forum



## Keynote

Tom Eckersley, Head of Marketing, Hg  
Kristin Custar, Partner, Head of the Global Investor Capital Group, The Jordan Company

## Speakers

John Ancona, Managing Director, JPMorgan Chase & Co  
Brian Anderson, Head of IR Network and Events, Private Equity International  
Christina Anzel, Director, Client Team, Generation IM  
Mary Armstrong, Global Head of Marketing & Communications, General Atlantic  
Nina Assouline, Deputy General Counsel, Harvest Partners  
Raj Bakhru, Chief Executive Officer, BlueFlame AI  
Stephanie Bednar, Head of Investor Relations, H.I.G. Capital  
Avyanna de Biswas, Managing Director, IR, Infrastructure Equity, Manulife Investment Management  
Caitlin Brodie, Managing Director, The Carlyle Group  
Jay Brupbacher, Managing Director, Investor Relations and Fundraising, The Raine Group  
Thomas Buley, Founder and CEO, Sightglass  
Andrew Campbell, Partner, DC Capital Partners  
Erik Cafarella, Co-founder & Managing Partner, Nebrodi Partners  
Melissa Cameron, Head of Marketing Europe, Advent  
Richard Carpenter, Chief Executive Officer, Bladonmore  
Michele Chow-Tai, Managing Director, Business Development, Fairview Capital Partners  
Shavonne Correia, Head of Investor Relations and Marketing, KPS Capital Partners  
Alex Curry, Senior Associate, CPP Investment Board  
Rushana Cypert, Vice President, Investor Relations, The Capstreet Group  
Sean Cumiskey, Head of Investor Relations, Omega Funds  
Michelle Daubar, Partner, Investor Relations & Capital Formation, Oak HC/FT  
Shernaz Daver, Operating Partner, Khosla and Company  
Deanna DeChirico, Director, Fundraising and Investor Relations, The Riverside Company  
Jenny Delaney, Head of Investor Relations for Equity Private Markets, Blackrock  
Farrell Denby, Vice President, Corporate Communications & Branding, Oaktree Capital Management  
Carrie DiLauro, Director, Operations and Marketing, Hamilton Robinson Capital Partners  
Irene Hong Edwards, Partner, Head of Investor Relations, Lovell Minnick Partners  
Rebeca Ehrnrooth, Managing Director, Head of Investor Relations & Capital Markets, Equilibrium Capital  
David Fann, Senior Managing Director, Head of Investor Relations, VSS Capital Partners  
Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub  
Laura Fahrney, Partner, Investor Relations, Ribdgemont Equity Partners  
Nicole Faurot, Director, Director of Fundraising and Investor Relations, The Riverside Company  
Michael Felman, President and CEO, MSF Capital Advisors  
Colleen Floberg, Principal - Capital Formation & Business Development, GI Partners  
Kathlika Fontes, Director of Investor Relations, Grain Management  
Dan Fordyce, Senior Associate, Summation Capital  
Lauren Gruchy, Field Events Manager, Georgian  
Britney Hamberg, Principal, Investor Relations & Operations, RC Capital  
Amy Harsch, Managing Director, Investor Relations, American Securities  
Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors  
Jillian Hazelton, Head of Marketing and Communications, Bregal Investments  
Karen Heidelberg, Partner, Chief Partnership Officer, Deerfield Management



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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  
Michael S. Hong, Partner, Investment Management, Davis Polk & Wardwell  
Carsten Huwendiek, Managing Director, Marketing and Communications, CVC Capital Partners  
Alex Hwang, Managing Director, KKR Solutions, KKR  
Ashley Johansen, Head of IR and Fundraising, Monomoy Capital Partners  
Priya Karkar, Managing Director, Investor Relations & Business Development, Kline Hill Partners  
David Katona, Head of Business Development and Investor Relations, Petrichor + Scion  
Nancy Katz, Senior Director, Costanoa Ventures  
Tracie Kelly, Director of Marketing, Excellere Partners  
Karolina Kmiecik, Senior Vice President, Head of Communications, Slate Asset Management  
Ruth Lane, Head of Investor Relations, Sterling Investment Partners  
Kareen Laton, Managing Director, Head of Investor Relations, NovaQuest Capital Management  
Rachelle Legentus, Product Marketing, Alternative Investments, SS&C Intralinks  
Rachel Lemberg, Head of Business Development and Investor Relations, ITE Management  
Jennifer Ma, Principal, Advent  
Emily Mason, Managing Director, Head of Investor Relations & Fundraising, Cornell Capital  
Amrita Mainthia, VP, Investor Relations, General Catalyst  
Abubakr "Mali" Malida, Director, Strategic Relationships, Alpha Partners  
Shant Mardirossian, Partner and Chief Operating Officer, Kohlberg & Company  
Kristen Margeson, Vice President, Investor Relations and Marketing, Atlas Venture  
David Martus, Managing Director of Investor Relations, GSSG Solar  
Kate McGann, Principal, Corporate Communications & Public Relations, Hamilton Lane  
Emily Melchior, Partner, Fundraising & Investor Relations, American Industrial Partners  
Jeff Mills, Partner, Head of Investor Relations, Madrona  
Roseita Monteiro, Principal Investor Relations, Collier Capital  
Caroline Page, Partner, HighVista Strategies  
Allan Petersen, Managing Director and COO, Nautic Partners  
Kathryn Pothier, Partner, Investor Relations, Epiris  
Alia Rafi, Principal, Investor Relations and Fundraising, FTV Capital  
Sunil Rao, COO and CFO, Plum Alley Ventures Company  
Nikki Reyes, Business Development and Investor Relations Director, Benefit Street Partners  
Kathleen Rochard, Vice President, Investor Relations and Marketing, Serent Capital  
Jennifer Rogg, Managing Director - Head of Investor Relations, Dunes Point Capital  
William L. Rosener, Managing Director, Head of Institutional Client Solutions for Strategic Partners, Blackstone  
Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen II Fund Services  
Zach Russo, Head of Studio, RF Studio53  
Arielle Gross Samuels, Chief Marketing and Communications Officer, General Catalyst  
Phillippe T. Schenk, Global Head of Fundraising and Investor Relations, 500 Global  
Emily Schillinger, Executive Vice President of Public Affairs, American Investment Council  
Natasha S. Siegal, Head of Investor Relations, Veritas Capital  
Susan Stella, Head of Investor Relations and IR, Activate Capital  
Betsy Sylvester, Managing Director, Head of Client Management, Castlelake  
Lauren Testa, Head of Marketing, North America, Advent  
Brad Thawley, Partner, Limited Partner Relations, New Enterprise Associates (NEA)  
Iris Tomczyk, Vice President of Marketing and Communications, DigitalBridge  
James Varela, Partner, Head of Middle East, Rede Partners  
Jolie von Arnim, Head of Investor Relations, Freshstream



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# New York Forum



Alexandra Walker, Head of Marketing and Communications, 17Capital  
Rick Walsh, Partner, Court Square Capital Partners  
Ashley Webster, Senior Director, Global Head of Real Estate Investor Relations, Nuveen Real Estate  
Sarah Wessling, Vice President, Growth Strategy, FEG Investment Advisors  
Kenya Williams, Managing Director - Real Estate Product Specialist, Oaktree Capital Management  
Dodson Worthington, Managing Director, Churchill Asset Management LLC  
Elizabeth Yates, Senior Director, Investor Relations and Head of Americas, Thoma Bravo  
Allison Yazel, Vice President, Marketing, Manna Tree Partners  
Eliza Young, Vice President, Communications, Thoma Bravo  
Stanley Yu, Principal, Investor Relations, Leonard Green & Partners

## 2025 Agenda

**Day 1:** March 26, 2025

**8:00** Registration and Breakfast

**8:10** Interactive Breakfast Discussions

### Meeting A

#### Investor Relations and 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

#### *Moderator*

Lauren Gruchy, Field Events Manager, Georgian

#### *Panelists*

- Ashley Webster, Senior Director, Global Head of Real Estate Investor Relations, Nuveen Real Estate
- Kristen Margeson, Vice President, Investor Relations and Marketing, Atlas Venture
- Karolina Kmiecik, Senior Vice President, Head of Communications, Slate Asset Management
- Jillian Hazelton, Head of Marketing and Communications, Bregal Investments

**9:00** Welcome

Brian Anderson, Head of IR Network and Events, Private Equity International

#### **Chair opening remarks**

Melissa Cameron, Head of Marketing Europe, Advent



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# New York Forum



9:15

## Keynote Fireside Chat- Build strong cultures internally to achieve better external relationships

- Recognize potential and develop contributors with the right attributes and mindset
- Ensure a comprehensive IR and marketing program with a team-based approach
- Appeal to a global audience with investor communications that account for regional differences
- Learn strategies for engaging new and existing investors

*Keynote*

Kristin Custar, Partner, Head of the Global Investor Capital Group, The Jordan Company

*Moderator*

Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub

10:00

## A Day in the life: An inside look with two thought leaders in the LP community

- Forge and fortify LP relationships by learning what LPs and appreciate
- Glean lessons from what the day-to-day looks like for LPs
- Augment your approach with insights into what LPs are seeing in terms of outreach
- Improve communications with a window into what, how and how often LPs want to hear from you
- Get from “us-them” (transactional) conversation to the “we” conversation
- Negotiate fees, terms, etc without upsetting your LP-GP dynamic
- Know works when delivering news that ranges from not-so-good to bad

*Moderator*

Rick Walsh, Partner, Court Square Capital Partners

*Panelists*

- Dodson Worthington, Managing Director, Churchill Asset Management LLC
- Erik Cafarella, Co-founder & Managing Partner, Nebrodi Partners

10:45

## Networking break

11:15

## 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

## 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
- Differentiate your product
- Cater to consultants to maximize return on investment



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# New York Forum



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

*Moderator*

Nicole Faurot, Director, Director of Fundraising and Investor Relations, The Riverside Company

*Panelists*

- Laura Fahrney, Partner, Investor Relations, Ridgemont Equity Partners
- Kathleen Rochard, Vice President, Investor Relations and Marketing, Serent Capital
- Peter Rosenstein, Chief Product Officer, Digital Solutions, Gen II Fund Services
- Thomas Buley, Founder and CEO, Sightglass

*Moderator*

Sunil Rao, COO and CFO, Plum Alley Ventures Company

*Panelists*

- Emily Mason, Managing Director, Head of Investor Relations & Fundraising, Cornell Capital
- Leslie Hill, Partner, Chief Operating Officer of Global Capital Formation, Sagard
- David Katona, Head of Business Development and Investor Relations, Petrichor + Scion
- Allan Petersen, Managing Director and COO, Nautic Partners

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 distinguish your firm

*Co-facilitators*

- Rushana Cypert, Vice President, Investor Relations, The Capstreet Group
- Tracie Kelly, Director of Marketing, Excellere Partners

### 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*

- Jolie von Arnim, Head of Investor Relations, Freshstream
- Betsy Sylvester, Managing Director, Head of Client Management, Castlelake



# New York Forum



1:55	AI: Present use cases and possibilities	Build and develop your team	Rise of semi-liquid vehicles in private markets
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- Where to start
- How to test it and conduct assessments
- What are the benefits of using it and how do you measure success
- What third parties are people using
- Precautions to address threats to privacy and security
- Leverage opportunities for your team
- Role of AI in background research

*Moderator*  
Arielle Gross Samuels, Chief Marketing and Communications Officer, General Catalyst

- Panelists*
- Brad Thawley, Partner, Limited Partner Relations, New Enterprise Associates (NEA)
  - Phillippe T. Schenk, Global Head of Fundraising and Investor Relations, 500 Global
  - Raj Bakhru, Chief Executive Officer, BlueFlame AI
  - Jeff Mills, Partner, Head of Investor Relations, Madrona

- 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
- Get C-suite buy-in to procure investment in and resources
- Tailor your team structure
- Find the intersection of IR and marketing teams

*Moderator*  
Caitlin Brodie, Managing Director, The Carlyle Group

- Panelists*
- Andrew Campbell, Partner, DC Capital Partners
  - Kathryn Pothier, Partner, Investor Relations, Epiris
  - Stanley Yu, Principal, Investor Relations, Leonard Green & Partners
  - Shavonne Correia, Head of Investor Relations and Marketing, KPS Capital Partners

- 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

*Moderator*  
Fatma Luy, Director, CVC Capital Partners

- Panelists*
- Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors
  - Rachel Lemberg, Head of Business Development and Investor Relations, ITE Management
  - Kenya Williams, Managing Director - Real Estate Product Specialist, Oaktree Capital Management
  - Nikki Reyes, Business Development and Investor Relations Director, Benefit Street Partners

**2:45 Networking break**

**Speaker office hours** -Investor Relations Network members only.

**2:45** During this auxiliary session, speakers and other participants will meet up to extend the conversation about a popular session topic. The bulk of the questions during this informal panel will be participant questions.

Expansion of LP wisdom on building strong relationships with GPs panel (4:10-5:00)  
Speakers

- Dan Fordyce, Senior Associate, Summation Capital
- Michael Felman, President and CEO, MSF Capital Advisors



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# New York Forum



3:15	Collaborative synergies with internal allies	Storytelling that is authentic and compelling	Side letter negotiations and LP requests
	<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> <li>• Practical approaches for when your facing roadblocks</li> <li>• Investigate internal processes for how conducive they are for collaboration</li> <li>• Use of technology for workflow</li> </ul> <p><i>Moderator</i> Jeff Mills, Partner, Head of Investor Relations, Madrona</p> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>• Colleen Floberg, Principal - Capital Formation &amp; Business Development, GI Partners</li> <li>• Kate McGann, Principal, Corporate Communications &amp; Public Relations, Hamilton Lane</li> <li>• Michelle Daubar, Partner, Investor Relations &amp; Capital Formation, Oak HC/FT</li> <li>• Karen Heidelberger, Partner, Chief Partnership Officer, Deerfield Management</li> </ul>	<ul style="list-style-type: none"> <li>• What is the right approach for your firm</li> <li>• Pave your unique brand journey</li> <li>• What rings true with disparate constituencies</li> <li>• Importance of tailoring message length and channel(s) used based on audience</li> <li>• Best-in-class thought leadership: Owned content and digital storytelling</li> </ul> <p><i>Moderator</i> Shernaz Daver, Operating Partner, Khosla and Company</p> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>• Jennifer Rogg, Managing Director - Head of Investor Relations, Dunes Point Capital</li> <li>• Allison Yazel, Vice President, Marketing, Manna Tree Partners</li> <li>• Avyanna de Biswas, Managing Director, Investor Relations, Infrastructure Equity, Manulife Investment Management</li> </ul>	<ul style="list-style-type: none"> <li>• What terms in side letters are new in past 12 months</li> <li>• What are LPs asking for</li> <li>• At what point should IR be in the conversation</li> <li>• Manage your internal constituency and manage your fund law firm</li> <li>• Work in concert with other functions</li> <li>• Use marketing skillsets to translate and position information and incremental materials to LPs</li> </ul> <p><i>Moderator</i> Natasha S. Siegal, Head of Investor Relations, Veritas Capital</p> <p><i>Panelists</i></p> <ul style="list-style-type: none"> <li>• Michael S. Hong, Partner, Investment Management, Davis Polk &amp; Wardwell</li> <li>• Nina Assouline, Deputy General Counsel, Harvest Partners</li> </ul>



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## 4:10 LP Panel: Ongoing communications with investors

- Managing relationships amid slower/challenging DPI
- Best in class GP/LP engagement beyond fundraising cycles
- Advice on communicating authentically/programmatically with LPACs
- Reporting expectations vs. exasperation: how often and what are you reporting

### *Moderator*

Amrita Mainthia, VP, Investor Relations, General Catalyst

### *Panelists*

- Alex Curry, Senior Associate, CPP Investment Board
- Dan Fordyce, Senior Associate, Summation Capital
- Alex Hwang, Managing Director, KKR Solutions, KKR
- Michael Felman, President and CEO, MSF Capital Advisors

## 5:00 20<sup>th</sup> Anniversary Reception

This year we're celebrating two big milestones – the 20th anniversary of the investor relations forum and the launch of the Investor Relations Network!

Join as we toast to our years of success and to thank the trailblazers who made them possible.

## Day 2: March 27, 2025

### 8:00 Breakfast

### 8:10 Breakfast of Champions - Investor Relations Network members only.

*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. 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.

R.S.V.P. required



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# New York Forum



**9:10**      **Opening remarks**

Melissa Cameron, Head of Marketing Europe, Advent

**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

*Moderator*

Mary Kathleen (MK) Flynn, Editor-in-Chief, PE Hub

**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

*Moderator*

Carsten Huwendiek, Managing Director, Marketing and Communications, CVC Capital Partners

*Panelists*

- Irene Hong Edwards, Partner, Head of Investor Relations, Lovell Minnick Partners
- Jennifer Ma, Principal, Advent
- Kathlika Fontes, Director of Investor Relations, Grain Management
- Ashley Johansen, Head of IR and Fundraising, Monomoy Capital Partners
- Richard Carpenter, Chief Executive Officer, Bladonmore

**10:50**      **Networking break**

**10:50**      **Speaker office hours** - Investor Relations Network members only.

During this auxiliary session, speakers and other participants will meet up to extend the conversation about a popular session topic.



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# New York Forum



11:20

## Crisis communications and issues management

- Counter and leverage the influence of social media
- Organize with an emphasis on immediacy
- The art of delivering bad news for crises and small c crises (e.g., portfolio issues, etc.)
- 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

### *Moderator*

Emily Schillinger, Executive Vice President of Public Affairs, American Investment Council

### *Panelists*

- Amy Harsch, Managing Director, Investor Relations, American Securities
- Lauren Testa, Head of Marketing, North America, Advent
- Sarah Wessling, Vice President, Growth Strategy, FEG Investment Advisors
- Farrell Denby, Vice President, Corporate Communications & Branding, Oaktree Capital Management

## 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
- What is the process around selecting a placement agent
- How to coordinate the timing and your collaboration
- Compare and contrast using regional vs global placement agents
- What is the value-add

### *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
- Nancy Katz, Senior Director, Costanoa Ventures
- Shant Mardirossian, Partner and Chief Operating Officer, Kohlberg & Company

## 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 market and pitch differently
- Scalability: What structure are you using to bring them in and how to service them

### *Moderator*

Ruth Lane, Head of Investor Relations, Sterling Investment Partners

### *Panelists*

- Sean Cumiskey, Head of Investor Relations, Omega Funds
- Abubakr "Mali" Malida, Director, Strategic Relationships, Alpha Partners
- Carrie DiLauro, Director, Operations and Marketing, Hamilton Robinson Capital Partners
- John Ancona, Managing Director, JPMorgan Chase & Co

# New York Forum



12:10

## Networking luncheon

1:10

### Navigating the backlash and regional nuances to ESG and DEI

- 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

#### *Moderator*

Britney Hamberg, Principal, Investor Relations & Operations, RC Capital

#### *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
- Rebeca Ehnrooth, Managing Director, Head of Investor Relations & Capital Markets, Equilibrium Capital

### 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
- 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
- William L. Rosener, Managing Director, Head of Institutional Client Solutions for Strategic Partners, Blackstone

### Improve connections with LPs using tools and technology creatively and effectively

- Use video to tell your story
- Innovative strategies for communications
- Avoid common mistakes when incorporating tech into your strategy
- Measure and hone effectiveness
- Leverage digital connectivity for large scale interactions while providing a personal and nuanced touch
- Consider technologies best deliver and amplify your message
- Tools that help AGMs to engage LPs
- Make it more seamless from back office to you when fundraising

#### *Moderator*

Rachelle Legentus, Product Marketing, Alternative Investments, SS&C Intralinks

#### *Panelists*

- Narmeen Haider, Director of Strategic Operations, B Capital Group
- Eliza Young, Vice President, Communications, Thoma Bravo
- Deanna DeChirico, Director, Fundraising and Investor Relations, The Riverside Company
- Emily Melchior, Partner, Fundraising & Investor Relations, American Industrial Partners



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# New York Forum



2:05

## Differentiate your brand for fundraising

- 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
- Messaging and language that is brand consistent but tailored
- How your brand translates internationally with sensitivity
- Reputation management for the AI-powered-search era

### *Moderator*

Zach Russo, Head of Studio, RF Studio53

### *Panelists*

- Jay Brupbacher, Managing Director, Investor Relations and Fundraising, The Raine Group
- Iris Tomczyk, Vice President of Marketing and Communications, DigitalBridge
- Alexandra Walker, Head of Marketing and Communications, 17Capital

2:55

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

Discover the latest figures in compensation for 2024. This session will reveal the results of the largest investor relations compensation study in the industry.

3:15

## End of conference



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