

New York Forum

Celebrating 20 years of fundraising solutions

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



Jenny Delaney
Head of Investor Relations for
Equity Private Markets
Blackrock



Tom Eckersley
Head of Marketing
Hg



Elizabeth Yates
Investor Relations and
Fundraising
(Head of Americas)
Thoma Bravo



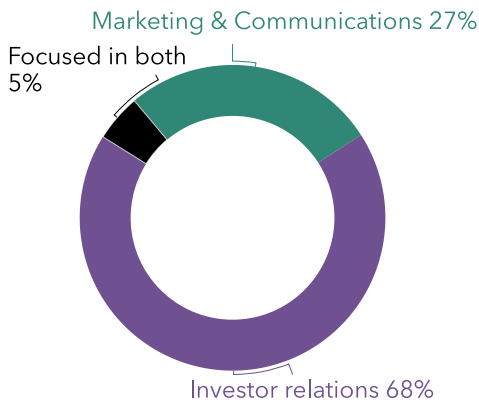
Navigate a changing fundraising landscape alongside **250+ IR and marketing professionals** in New York City this March 25-26.

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.

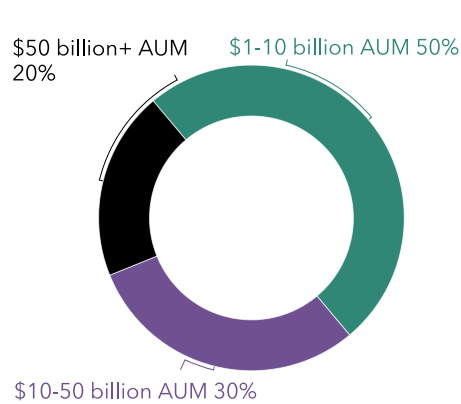
Become a founding member of the Investor Relations Network

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

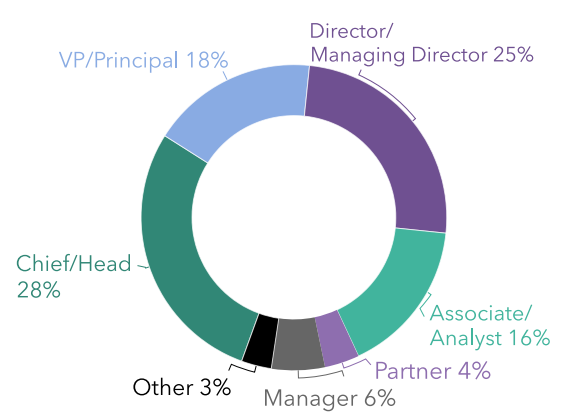
Attendees by job focus



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](#)

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Keynote

Tom Eckersley, Head of Marketing, Hg

Speakers

Christina Anzel, Director, Client Team, Generation IM
Mary Armstrong, Global Head of Marketing & Communications, General Atlantic
Avyanna de Biswas, Managing Director, Investor Relations, Infrastructure Equity, Manulife Investment Management
Caitlin Brodie, Managing Director, The Carlyle Group
Jay Brupbacher, Managing Director, Investor Relations and Fundraising, The Raine 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
Tracie Kelly, Director of Marketing, Excellere 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
Kathleen Rochard, Vice President, Investor Relations and Marketing, Serent 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
Phillippe T. Schenk, Global Head of Fundraising and Investor Relations, 500 Global
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, Castlake
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
Stanley Yu, Principal, Investor Relations, Leonard Green 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
- Kathleen Rochard, Vice President, Investor Relations and Marketing, Serent Capital

10:45 Networking break



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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 distinguish your firm

Co-facilitator

- 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

- 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"> 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 <p><i>Panelists</i></p> <ul style="list-style-type: none"> Brad Thawley, Partner, Limited Partner Relations, New Enterprise Associates (NEA) Phillippe T. Schenk, Global Head of Fundraising and Investor Relations, 500 Global 	<ul style="list-style-type: none"> 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 <p><i>Panelists</i></p> <ul style="list-style-type: none"> Andrew Campbell, Partner, DC Capital Partners Kathryn Pothier, Partner, Investor Relations, Epiris Stanley Yu, Principal, Investor Relations, Leonard Green Partners 	<ul style="list-style-type: none"> 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 <p><i>Panelists</i></p> <ul style="list-style-type: none"> Natalie Harvard, Partner, Head of Investor Relations, Oak Hill Advisors Catherine Saunders, Managing Director, Business Development, Benefit Street Partners
2:45	Networking break		
2:45	<p>Speaker office hours</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. R.S.V.P. required</p>		

New York Forum



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
- Pave your unique brand journey
- 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
- Avyanna de Biswas, Managing Director, Investor Relations, Infrastructure Equity, Manulife Investment Management

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



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Amrita Mainthia, VP, Investor Relations, General Catalyst

Panelists

Michael Felman, President and CEO, MSF Capital Advisors

5:00 20th Anniversary Gala & Awards Ceremony

This year marks two exciting milestones—the 20th 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. 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. R.S.V.P. 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

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



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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. R.S.V.P. required

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

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

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

Moderator

Sean Cumiskey, Head of Investor Relations, Omega Funds

12:10

Networking luncheon



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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

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

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, Collier 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

Messaging: Technologies and providers that deliver

- Look into which technologies best deliver and amplify your message
- Think about your cost benefit analysis
- Consider security concerns
- What common mistakes made are by GPs when incorporating tech?

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

Panelists

Jay Brupbacher, Managing Director, Investor Relations and Fundraising, The Raine Group



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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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