Investor Relations Network

An inclusive peer community for IR and marketing professionals from private markets

2025 Calendar

** topics, times and dates are subject to change*

February 2025

Meet Your Investor Relations Network Advisory Board + Firm and Fund Branding: Setting the Firm & Fund Apart

Date: February 20
Format: Virtual, Meeting
Join fellow Investor Relations Network members to discuss:

- Differentiating your firm/fund strategy, processes, and related messaging.
- Developing a clear brand identity and would be helpful to discuss.
- Creative avenues/tools that people enhance their marketing.

March 2025

Investor Relations Network New York Forum

Date: March 26-27, Convene, 360 Madison Avenue, New York
Format: In person; Conference
This must-attend marquee event for investor relations and marketing executives and aspiring executives in private markets is renowned for facilitating networking and conversations to share best practices and connect on shared challenges. Topic areas include

- Fundraising strategies
- Marketing and communications for new and existing investors
- Attracting and retaining investors
- Working with internal and external allies

Executive Coaching Workshop: How to Persuade Key Stakeholders Faster

Date: March 31
Format: Virtual; Workshop
Join us to learn best practices in speeding up the influencing and persuasion process. In particular, the speeding up of connecting, trust building, and influencing with key stakeholders in 1-1 meetings. In this session, we will:

- Introduce simple ways to assess how connected you are to a stakeholder
- Identify the signs that they are losing interest, putting up barriers, or simply aren't interested
- Learn how to reframe your argument, focusing on their goals to appeal to them
- Discuss the art of being persuasive under pressure, and the importance of retaining power in the room

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April 2025

Reaching and Engaging LPs in 2025

Date: April 10
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- Marketing strategies and tactics to source new leads
- How events can help build and fortify your brand
- How to convey your brand online
- Networking with peers and how to build that base as a resource
- Various approaches including using technology

Webinar: 1Q Update on the State of Private Markets with PEI

Date: April 24
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

May 2025

Supper Club: New York

Date: May 8, New York City
Format: In person; Dinner
Come join your fellow Investor Relations Network members for cocktails followed by a thought leadership roundtable on Communications with LPs

- Should the industry standardize IR communication with LPs?
- Cadence of investor communication–how much is too much and how much is too little?
- How is the role of the IR leader shifting and the change in expectations?

Get Meetings with LPs

Date: May 20
Format: Virtual; Meeting
Join your Investor Relations Network members to discuss:

- Marketing strategies and tactics to secure meetings
- How your initial touchpoints set the cornerstone of the relationship
- Understanding LP requirements and preferences in the beginning phase of the relationship

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June 2025

Close the Deal with LPs

Date: June 5
Format: Virtual, Meeting
Join your Investor Relations Network members to discuss:

- Important considerations for closing the deal
- Optimal cadence of investor communications
- Handling questions around topics such as DPI, fewer exits, etc

Executive Coaching Workshop – Reducing Friction Early Between Seniors and Juniors

Date: June 12
Format: Virtual; Workshop
Join us to discuss best practices and common headaches when supervising, supporting, and working with younger team members. In this session, we will:

- Discuss the friction points in working practices between senior players (Boomers/Gen X) and junior players (Millennials/Gen Z), leveraging the room's observations and experience
- Identify what micromanagement is versus coaching and why some people always seem to feel micromanaged
- Leverage the interview, onboarding, or 1-1 meeting process to uncover how they work best, how they define micro-management, and what they believe is a fair and preferred way to communicate and negotiate on process, deliverables, deadlines, consequences, short-term goals, and rewards (the communicating and negotiating yours to them – including when it is appropriate to ask "Why?" versus just doing it)
- Introduce the benefits of "Reverse-Mentoring" to inter-generational relationships

Executive Coaching Workshop: Building an Executive Presence Using Gravitas and Reading the Room

Date: June 17
Format: Virtual; Workshop
Join us to learn how to build an executive presence during and outside of meetings. We will:

- Identify and discuss your Gravitas when entering a room and discuss ways to vary this depending on who is in the room, and what their needs are. We will look at gravitas needs from the perspective of investors, operators, and associates, and the challenges CFO's face in meeting these needs
- Teach you how to monitor and be deliberate in your tone, body language, posture, placement, and verbal habits to maximize your executive presence, as well as introduce a tool called the PVA that can help measure your gravitas
- Develop impression management awareness and skills while understanding the threats others bring in terms of their bias and perceptions

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Executive Coaching Workshop: Coaching One-on-One
Date: June 24
Format: Virtual; Workshop
Join us to learn how to apply best practices to 1-1 coaching of direct reports. This can be challenging if we are not connected, lack a plan, don't know how to navigate their emotions, or we find ourselves lecturing followed by awkward silence. In this session, we will:

- Outline ways to increase the speed of connection, and the importance of monitoring and maintaining it throughout the conversation, along with identifying early on where they are now, and where they are headed as we introduce the GROW model
- Assess and adapt to their personality, their emotional state, and their need for a transactional or transformational coaching style, as well as monitoring your bias going into the conversation
- Apply best practices around how and when to question, empathize, and reciprocate via storytelling to improve outcomes

July 2025

How to Tap into the Family Office Market
Date: July 15
Format: Virtual, Meeting
Join fellow Investor Relations Network members to discuss:

- Marketing strategies and tactics for the family office segment
- Crucial steps and resources to educate and attract family offices
- Trends in the market across family offices (flexibility, terms, etc.)

Webinar: 2Q Update on the State of Private Markets with PEI
Date: July 24
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

August 2025

Fundraising Abroad
Date: August 12
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- Marketing strategies and tactics for attracting foreign investors
- Key trends in the international markets.)?
- Considerations for developing international relationships

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Webinar: Q3 Fundraising Review
Date: August 19
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

September 2025

Crisis Communications
Date: September 11
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:
- Crisis communications frameworks to apply for your investor communications
- Managing your stakeholders when a crisis occurs
- Considerations for crisis communications (e.g., transparency, cadence, communication channels, one-way and two-way communications, etc.)

October 2025

What to Do When You're Not Fundraising
Date: October 9
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:
- Best practices for CRM, data management, and analytics/reports
- Managing your aggregated research while in pre-fundraise phase
- What you can do to 'always be fundraising' even when not officially in market

Executive Coaching Workshop: Changing Your Brand and Perceptions of You Over Time (Outside Your Organization)
Date: October 21
Format: Virtual; Workshop
Join us to learn how to develop your reputation outside your organization. To be thought of as a competent professional who cares about other's success. In this session, we will discuss:
- Common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list.
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation

Executive Coaching Workshop: Shifting from Expert to Non-Expert Leader: How to Lead When You Aren't the Expert in the Room

Date: October 23
Format: Virtual; Workshop
Join us to learn how leaders can add value in team meetings, even when the topic isn't their expertise. In this session, we will:

- Uncover the fears and beliefs managers have that lead to imposter syndrome, which often limits their questions and comments
- Discuss leader gravitas and its impact on energy and contributions of the team during meetings.
- Apply principles of leadership coaching in meetings when you aren't in charge, nor are the expert, to foster strategic group discussions and gain the respect of the room.

Executive Coaching Workshop: Working with and Managing Different Personalities

Date: October 28
Format: Virtual; Workshop
Join us to learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will discuss:

- Breakdown the four categories by: imaginative talkers, detail workers, decision makers, peacekeepers, and additional combinations of work context personality
- Discuss which work personality causes finance professionals the most challenges
- Unpack hot buttons and motivational drivers for each category

Webinar: 3Q Update on the State of Private Markets with PEI

Date: October 30
Format: Virtual, Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

November 2025

How to Tap into the Insurance Market

Date: November 13
Format: Virtual; Meeting
Join fellow Investor Relations Network members to discuss:

- How insurance companies fit into the institutional investor space
- Trends we are seeing around insurance companies desire within private market investments (e.g., fund types, asset classes, geographies, co-investment, etc.)?
- The future of insurance companies as LPs.

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December 2025

How to Create Events & AGMs that LPs Love

Date: December 9
Format: Virtual; Meeting
Join your Investor Relations Network for discussion on:

- Communications and productions tips for compelling LPs to attend in person
- Virtual, hybrid, and in-person events – what is everyone doing these days?
- Tools and tactics for productive and seamless events
- Pre- and post-event actions for optimizing engagement

Webinar: PEI LP Perspectives

Date: December 16
Format: Virtual; Presentation
PEI's Editorial, Research, and Membership leaders bring you the latest quarterly data, sentiment, and outlook on global and regional private markets in debt, infrastructure, real estate, and private equity.

PEI

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