

Monday November 16th

6:30-8:30pm: Welcome Reception with a Global IR Warrior

An engaging evening with your global peers, spectacular views of New York and an entertaining fireside chat featuring a veteran IRO telling tales of far-flung roadshow destinations.

Tuesday November 17th

8:00-8.30am: Breakfast/Showcase

8:30-8:45am: Welcome and Introductions

Jim Cudahy – CEO and President, NIRI

Neil Stewart – Editorial Director, IR Magazine

Lance Spacek, Head of Corporate Access, Wells Fargo Securities

8:45-9:30am: Keynote Speech: Tectonic Shifts & Investor Relations Drivers

In an entertaining and thought-provoking presentation packed with information, our host Wells Fargo will give a briefing on current macro issues and market trends specially tailored to investor relations professionals. Get up to speed on the outlook for interest rates, oil prices, FX volatility, and geopolitical pressures, and join the speculation on how these pressures and others are shaping equity fund flows and investment trends.

9:30-10:30am: Panel Debate: Sustainability for Millennials vs Cash Return for Boomers

Many major institutional investors are urging companies toward longer-term strategies incorporating ESG factors. 2015 is a turning point, with climate change the center of attention and the Millennial generation becoming a force in the investment world. In this panel discussion and audience Q&A, we'll look at how investors want to engage with companies around sustainability, how corporate reporting is evolving to meet new demands, and how IROs can counter short-termism among sell-side analysts, senior management and investors.

- ✓ Practical guidelines for sustainability reporting and engagement
- ✓ News from McKinsey/CPPIB's Focusing Capital on the Long Term initiative, the Inclusive Capitalism project, and other initiatives.
- ✓ Climate change on the political agenda and in the corporate message in light of the 2015 UN Climate Change Conference in Paris

10:30-11:00am: Break/Showcase

11:00-11:15am: 15-Minute Briefing: Eye-openers from IR Magazine's 2015 Global IR Practice Survey

Neil Stewart, IR Magazine

11:15-11:45am: IR as a Competitive Advantage: The View from the C-Suite

A fireside chat with Colleen Johnston, CFO of Canada's TD Bank Group

11:45am-12:00pm: 15-Minute Briefing: Buy-side Sentiment Survey

12:00-1:30pm: Lunch: Industry Networking Roundtables

Participants will meet and network over lunch with their global peers at sector-themed tables.

1:30-2:15pm: Global Top 50 Case Studies Part I: Refining and Measuring Effective Global IR Programs

Two award-winning IROs will present case study presentations of their IR programs, zeroing in on how they set goals for global outreach and assess the results.

2:15-3:00pm: Panel Debate: Sell-side (R)evolution and the Impact on IR

Declining trading commissions, rising passive investment, epochal new European regulations – these are just some of the forces affecting equity research and corporate access. We'll explore how the sell-side, the buy-side and corporates are bracing for change, including how European regulation will reverberate world-wide, plus we'll look at emerging technological solutions for corporate access. How will small companies, small brokers and small institutions fare in this new world, and will larger players be increasingly dominant?

Subject to change – As of August 10, 2015

3:00-3:30pm: Break/Showcase

3:30-3:45pm: 15-Minute Briefing: Cutting-Edge Social Media

3:45-5:00pm: Speed-dating Discussions

Each table will cover different theme or issue, and participants will switch tables twice during the session, allowing them to engage in three different expert-led discussions during the course of the session. The discussion leaders will be invited to the stage to share their conclusions at the end. Possible topics:

- ✓ Social media & other technology
- ✓ Shareholder activism
- ✓ Sustainability & integrated reporting
- ✓ IR performance metrics
- ✓ Tips for investor days
- ✓ HFT, dark pools and market structure

5:30-7:30pm: Global Top 50 Awards Program and Reception

[Wednesday November 18th](#)

8:00-8:30am: Breakfast/Showcase

8:30-9:15am: Hybrid Live-Virtual Q&A with Fund Managers

This is your chance to turn the tables and grill the buy side. We are assembling a diverse panel of fund managers covering the gamut from sovereign wealth fund to hedge fund activist to long-only institution. What are their likes and dislikes about IR? How are a global fund manager's requirements different from those of a regionally focused one? How can you refine your approach to different types of investors? We'll have buy-side professionals live in the room as well as participating remotely:

- ✓ Investment decision-making process
- ✓ Time horizons and holding periods
- ✓ Preferences for guidance, reporting and access
- ✓ What's the perfect IRO according to fund managers?
- ✓ Getting good quality feedback after a meeting

9:15-9:30am: 15-Minute Briefing: Global Fund Flows & Targeting Tips

9:30-10:00am: IR Leaders Summit: The State of the Profession Globally

Leaders of professional IR associations from around the world discuss the changing role of IR around the world including training and qualifications for the evolving IR role.

10:00-10:30am: Break/Showcase

10:30-11:00am: Global Top 50 Case Studies Part II: Strategies for Different Regions

In case study presentations, two award-winning IROs will talk about their experiences in marketing to investors in different parts of the world and plans for the future.

11:00-11:45am: Ignite Talks & Shark Tank Grilling

This will be a chance to learn about new tools and services to expand your IR program in a lively, fun setting where all the pressure is all on the seller, not the buyer. In an Ignite presentation, a participant gets five minutes to speak with 20 automatically-advanced slides shown for just 15 seconds each. After all the presentations, two IROs will quiz the speakers and announce their top picks. To close the 2015 Global IR Forum, a Global Top 50 winner will be drafted to give his or her own surprise Ignite talk.