

THE POWER OF IR

Everything You Need to Know to Optimize
your #NIRI19 Experience

Webinar – April 18, 2019, 2:00pm ET



Speakers



Remy Bernarda, IRC
ACC Vice Chair
Sage IR, LLC



Tim Quast
ACC Vice Chair
ModernIR



Matt Bruschi
Chief Programs Officer
NIRI

Agenda

- Annual Conference Committee
- Agenda Overview & Programming
- What's New in 2019
- IR Showcase
- Conference Technology
- JW Marriott Desert Ridge
- What to Do Next...
- Q&A

2019 Annual Conference Committee

Chair

- Mike Conway, Director, Investor Relations & Corporate Communications, The Sherwin Williams Company

Vice-Chairs

- Remy Bernarda, IRC, President, Sage IR,
- Tim Quast, President, ModernIR

Committee Members

- Michele Backman, IRC, Director ADR Group, Deutsche Bank
- Andy Detwiler, CEO, Virtua Research
- Paul Donnelly, Director of IR, Nucor Corporation
- Bryan Dunn, IRC, Director of IR, Pfizer
- Sherif El-Azzazi, IRC, Director IR and Comms, Brookfield Property Partners
- Joseph P. Hassett, Senior Vice President, Gregory FCA

- Victoria Hyde-Dunn, Head of IR, 8x8, Inc.
- Martin Jarosick, IRC, VP IR, CF Industries
- Dave Martin, Director of IR, Harsco Corporation
- Megan Patterson, Manager IR, ONEOK, Inc.
- Brian Rivel, President, Rivel Research Group
- Angela Rodenhauer, VP IR, Dix & Eaton
- David Rosenbaum, IRC, Head of Investor Relations, Brighthouse Financial
- Zach Rothberg, Head of Investor Relations Sales, AlphaSense
- Amy Wakeham, VP IR and Corporate Comms, ResMed
- Jim Zeumer, VP Investor and Corporate Comms, PulteGroup

ACC Board Liaison

- Melissa Plaisance, GVP Treasury & IR, Albertsons, NIRI Board Chair-Elect (2019)
- Ron Parham, NIRI Board Chair (2019) *ex officio*

Programming

- More than 50 educational sessions
- 23 concurrent, 11 general, 6 Career Development Hub, 4 Lunch and Learn sponsored sessions, 2 Finance Talking seminars, 2 Sunday sponsored sessions
- 5 new Express Talk sponsored sessions in IR Showcase
- More than 100 speakers

Programming – Agenda at a Glance

Saturday, June 1, 2019

- 9:00 AM - 5:00 PM Pre-Conference Seminar: Finance and Capital Markets 101(*Separate reg.*)
- 7:00 PM - 9:00 PM NIRI Volunteer Appreciation Dinner (*by invitation only*)

Sunday, June 2, 2019

- 9:00 AM - 3:00 PM Pre-Conference Seminar: Telling a Great Investment Story (*Separate reg.*)
- 1:00 PM - 3:00 PM Sunday Session: Executing an Integrated Communications Plan
- 4:30 PM - 5:00 PM New to NIRI Conference Orientation
- 5:00 PM - 6:00 PM IRC Reception (*by invitation only*)
- 6:00 PM - 7:30 PM IR Showcase Opening Reception

Monday, June 3, 2019

- 6:30 AM - 7:30 AM Yoga
- 7:00 AM - 5:00 PM IR Showcase Open
- 7:30 AM - 8:30 AM Breakfast in the IR Showcase
- 8:30 AM - 11:30 AM General Sessions
- 11:30 AM - 1:30 PM IR Showcase: Express Talks, Exhibits, and Lunch
- 12:00 PM - 1:00 PM Senior Roundtable Luncheon (*SRT members only*)
- 1:30 PM - 4:00 PM Concurrent Sessions
- 4:00 PM - 5:00 PM Industry Breakouts and Networking
- 5:00 PM - 6:00 PM The IR Family Feud
- 6:00 PM - 7:00 PM 50th Anniversary Reception

Tuesday, June 4, 2019

- 6:30 AM - 7:30 AM Fitness Bootcamp
- 7:00 AM - 6:30 PM IR Showcase Open
- 7:30 AM - 8:30 AM Breakfast in the IR Showcase
- 7:30 AM - 8:30 AM 50th Anniversary Breakfast (*by invitation only*)
- 7:30 AM - 8:30 AM NIRI NextGen Breakfast
- 8:30 AM - 11:15 AM General Sessions
- 11:15 AM - 12:00 PM IR Showcase: Express Talks, Exhibits
- 12:15 PM - 1:15 PM Lunch & Learn Sessions
- 1:30 PM - 5:30 PM Concurrent Sessions
- 5:30 PM - 6:30 PM Closing Reception in the IR Showcase

Wednesday, June 5, 2019

- 8:00 AM - 8:45 AM Breakfast
- 8:45 AM - 9:45 AM Concurrent Sessions
- 10:00 AM - 12:00 PM General Sessions

Programming – General Sessions



BRETT REDFEARN

Director, Division of Trading
and Markets
U.S. Securities and Exchange
Commission

50 Years of Ups and Downs: The State of the Stock Market

Leon Cooperman

Chairman & CEO, Omega Family Office

Joseph Saluzzi

Partner and Co-Founder,
Themis Trading

Tim Quast

President, ModernIR



MALCOLM FRANK

Executive Vice President,
Strategy & Marketing
Cognizant

The Growing Influence of Artificial Intelligence

Evan Schnidman

Founder & CEO, Prattle

Jonathan Neitzell

Former Chief Data Officer, FE
Goldman Sachs Asset Management

Samuel Levenson

CEO, Arbor Advisory Group

Programming – General Sessions

The Future of IR – Trusted Strategic Advisor



LYNN TYSON

Executive Director, IR
Ford Motor Company



SMOOCH REYNOLDS

Managing Partner, Global IRO & CCO Practice
Leader, ZRG Partners

Creating a Positive Corporate Culture – Why it Matters to Employees, Customers and Investors

Michelle Edkins

Managing Director, Global Head of Investment
Stewardship, BlackRock

John Heinbockel

Managing Director, Analyst
Guggenheim Partners

Melissa Plaisance

Group Vice President, Treasury & IR
Albertsons Companies



JIM DONALD

Co-Chairman
Albertsons Companies

Programming – General Sessions



BOB DICKEY

Managing Director, Technical Strategist
RBC Wealth Management

**The Stock Market Today: Better
Than You Think**



HOLLY DUCKWORTH

Mindful Leadership Guide,
Leadership Solutions International

**Overcoming Leadership Stress
with Mindfulness**



GINA MARTIN ADAMS

Chief Equity Strategist
Bloomberg Intelligence

**From Macro to Micro, What
Stock Prices Tell Us Investors
Want Now**

Programming – Sessions

PRE-CONFERENCE SEMINARS *(separate registration)*

- Finance & Capital Markets 101 (Saturday)
- Telling a Great Investment Story (Sunday)

SUNDAY SESSIONS *(included in registration)*

- New to NIRI Conference Orientation Session
- Executing an Integrated Communications Plan

IR STRATEGY & PLANNING

- Get Shorty!: How IROs Manage Short-Selling to Achieve Fair Valuation
- Starting an IR Program from Scratch
- Hone Your Messaging to Most Effectively Tell Your Company Story
- Uncovering the Value of ESG in Business
- Evolving an IR Program to Include ESG Communications
- Your Crisis Plan is on the Shelf, but Now What?

CORPORATE GOVERNANCE, BOARD RELATIONS, AND STRATEGIC COLLABORATION

- The IRO's Role and Opportunity with investor engagement and proxy messaging
- IR Soft Skills for Success – Practical tools to increase your impact
- The Great Debate: Does Activism Create Shareholder Value?

MARKETING OUTREACH & STAKEHOLDER COMMUNICATIONS

- Holding an Investor Day that Transforms Perceptions
- Going on the Road – Best Practices for Investor Conferences and Roadshows
- Coming to America: A Foreign Company's Guide to the US and Global Markets
- Disclosure: Putting the Pieces of the Puzzle Together
- Click Here: Enhancing Shareholder Engagement with Digital Tools
- Deals - A Multi-Stakeholder View

BUSINESS INSIGHTS & CAPITAL MARKETS

- IRO as CIO (Chief Intelligence Officer) – The Essential Link Between the Street and Senior Management
- Big Data and the Future Value of Sell-Side Research
- You Mean Markets Don't Always Go Up? – IR Insights and Best Practices for Navigating a Downturn
- On the Stage and Off the Record: Meet the Hedge Funds
- What Every IR Professional Should Know about ETFs: This Era's Investment Phenomenon

FINANCIAL REPORTING & REGULATORY COMPLIANCE

- Hot Topics in Financial Reporting
- What's Next in Washington? A Discussion of Key Regulatory Issues for Public Companies

OTHER

- Lunch & Learn Sessions
- Industry Breakouts
- Let's Play Twenty Questions!

Programming – Engaging Experiences



Silent Auction



NIRI 50th Anniversary Celebration



The IR Showcase

- 50+ Exhibitors and Sponsors
- Extended Showcase Hours
- Demo Rooms
- Headshot Lounge
- New! Express Talks



HEADSHOT
LOUNGE

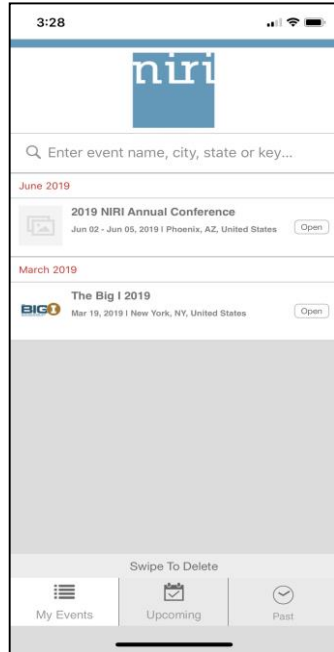
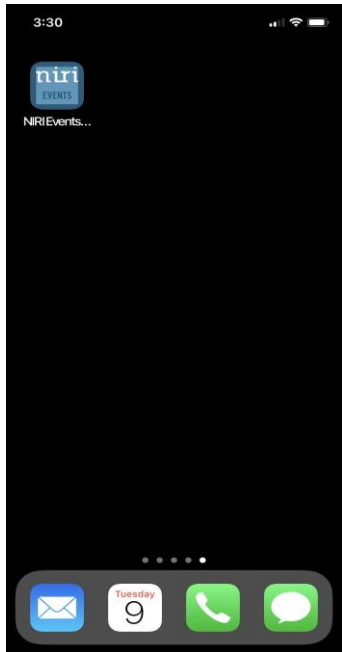


NIRI
EXPRESS
TALKS

THE
POWER OF IR **REFLECT • RENEW • REINVENT**

Technology

NIRI Events App



slido

Live polling

Q&A

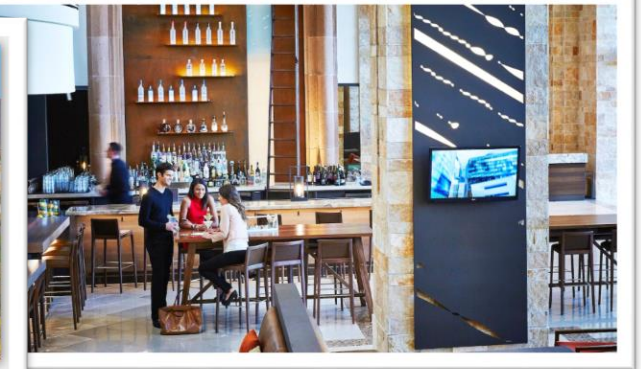
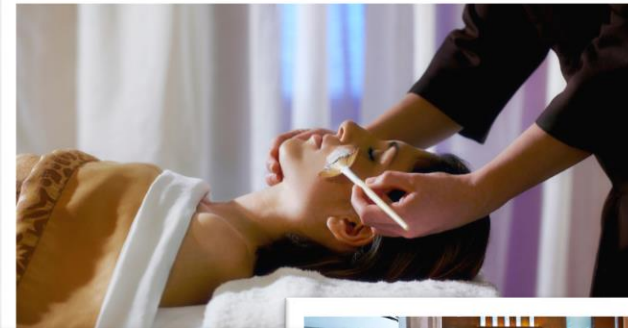
Investor Relations Charter - PDUs

IRC® credential holders can earn up to 4 PDUs per day for attending.

Use the NIRI Conference App to scan session QR codes for proof of session attendance.



JW Marriott Phoenix Desert Ridge



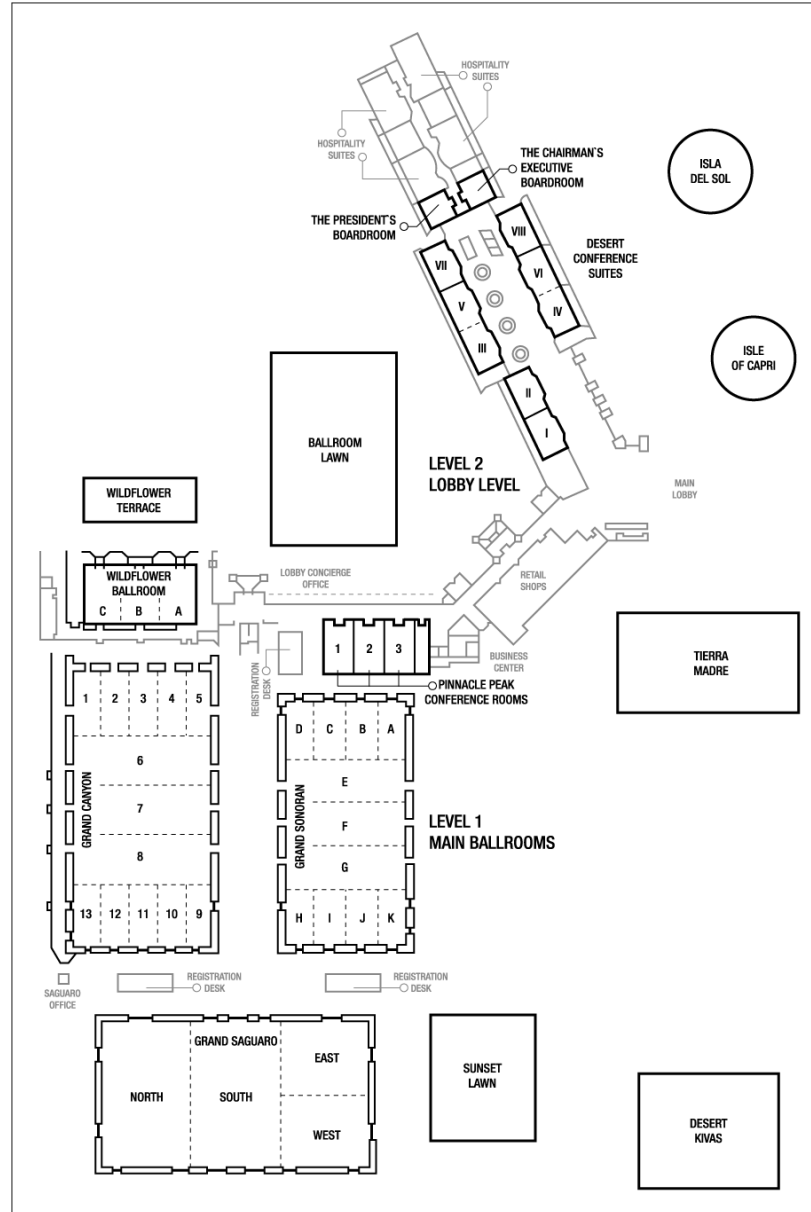
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JW Marriott Phoenix Desert Ridge



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JW Marriott – Conference Space



What Next...?

- Register! (www.niri.org/conference)
- Book your hotel before May 15 – use the link in your confirmation email
- Familiarize yourself with the sessions and speakers, and start planning your own schedule
- Check out the exhibitors
- Download the app on May 28 (“NIRI Events”)
- Pack your bags for Phoenix!

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Questions?

