



# DISCOVER

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**JUNE 10 – 13, 2018 | LAS VEGAS, NV | #NIRI18**

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**The must-attend premier global IR event**

- Corporate Governance & Regulatory
  - Finance & Markets
- Marketing Outreach & Stakeholder Communications
  - Professional Development

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# WELCOME



## Welcome to the NIRI 2018 Annual Conference, the must-attend premier global IR event!

The IR profession is rapidly changing. Capital markets are shifting, communications tools are evolving, and the demands for accountability, transparency, and disclosure from increasingly active investors are forcing us to consider new perspectives and strategies. IR professionals must not only know about these known issues but anticipate the “unknown unknowns” that lie ahead. We must be able to “see around the corner.”

With all that on your shoulders, you are in the right place. Welcome to the NIRI Annual Conference, the must-attend event for IR professionals. These two and one-half days are packed with the education, networking, and products and services discovery that enhance your knowledge of this changing environment and cement your reputation as a trusted advisor and counselor within your organization.

Your 2018 Annual Conference Committee and NIRI staff have worked hard for twelve months designing this conference with the goal of helping you add immediate value to your career, your company and your IR program.

They reimaged the conference to include new experiences that will engage and delight you. Look for fun, educational sessions like the IR Family Feud, and the IR Situation Room. Take control of your career at the Career Development Hub. Polish your skills at Live Media Training, or IR Sales Training. Get your professional portrait at the NIRI Headshot Lounge. And don't miss the IR Services Showcase, the largest gathering of IR products and services providers that can amplify your IR program.

On behalf of the NIRI Annual Conference Committee and NIRI Board, we invite you to discover #NIRI18!

**Victoria Sivrais**, *Chair, NIRI Annual Conference Committee*  
**Lee M. Ahlstrom**, *IRC, Chair, NIRI Board of Directors*  
**Gary A. LaBranche**, *FASAE, CAE, President and CEO, NIRI*

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**Please visit us at booth #323 during the NIRI Annual Conference in Las Vegas.**

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# GENERAL SESSIONS

**Adena Friedman, *President & CEO, Nasdaq***



**OPENING KEYNOTE:  
HOW TECHNOLOGY  
IS SHAPING THE  
CAPITAL MARKETS OF  
TOMORROW**

**MONDAY, JUNE 11**

**Brian Sullivan, *Worldwide Exchange Anchor  
and Senior National Correspondent, CNBC***



**UNLOCKING THE  
POWER OF FINANCIAL  
MEDIA**

**MONDAY, JUNE 11**

**Brian Beaulieu, *CEO, ITR Economics***



**A BEND IN THE ROAD -  
THE GLOBAL ECONOMIC  
PERSPECTIVE**

**WEDNESDAY, JUNE 13**

**Stacey Cunningham, *President, NYSE Group***



**BULLS, BEARS, UNICORNS, AND  
PROXY WARS: THE BATTLE FOR  
CLARITY AND COMMON SENSE IN  
TODAY'S CAPITAL MARKETS**

**TUESDAY, JUNE 12**

**Susan Carnicero, *Founding Partner, Qverity***



**SPY THE LIE:  
TRADECRAFT FOR THE  
IR PROFESSIONAL**

**WEDNESDAY, JUNE 13**

**ACTIVISM IN THE BOARDROOM - THE INSIDE SCOOP**

**Brian Rivel, *President, Rivel Research Group***

**Joele Frank, *Managing Partner, Joele Frank, Wilkinson Brimmer Katcher***

**G. Mason Morfit, *President and CIO, ValueAct***

**Chansoo Joung, *Director, Apache Corporation***

**Maura J. Clark, *Director, Agrium, Nutrien, and Fortis***

**TUESDAY, JUNE 12**

**ESG GOES MAINSTREAM**

**Elizabeth Saunders, *Partner, Clermont Partners***

**Katherine Collins, *Head of Sustainable Investing, Putnam***

**Jonathan Bailey, *Head of ESG, Neuberger Berman***

**Daniel Nielsen, *Head of ESG and Responsible Investing, Great Lakes Advisors***

**TUESDAY, JUNE 12**

## STAY CONNECTED

- Enjoy free WiFi in conference session rooms; SSID: NIRI2018; PW: niri18 (case sensitive)
- Download the NIRI conference events app to view session material, participate in polling, and more by searching the App Store for "NIRI Events" or texting "NIRI" to 99000, passcode "niri18".  
*Sponsored by NASDAQ Corporate Solutions.*
- Stay in touch with conference attendees through Twitter at #niri18

[www.niri.org/conference](http://www.niri.org/conference)





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### CONTINUOUS INFORMATION

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# CONCURRENT SESSIONS

## CORPORATE GOVERNANCE & REGULATORY

- Using the Proxy as a Communications Tool: Getting to the FINISH LINE with Better Outcomes
- The Changing Nature of Activism
- The ABCs of ESG
- MiFID II and its Impact on Your Investor Relations Program
- What the Board Wants to Know vs. Needs to Know?
- What's Next in Washington? A Discussion of Key Regulatory Issues for IR Professionals

## FINANCE & MARKETS

- The Evolution of Investing: Staying Active in an Increasingly Passive Investing World
- Blockchain & Cryptocurrency 101
- Raising Coin: Cryptocurrency as an Alternative to Traditional Capital
- A Buy-Sider's View of Valuing Companies
- Earnings Guidance: Value-Creating or Value-Destructive?

## MARKETING OUTREACH & STAKEHOLDER COMMUNICATIONS

- Pitch Your Stock Like a Sell-Side Analyst
- IR Teams in Crisis – How to Build and Maintain Stakeholder Trust
- From Complexity to Clarity – Integrated Messaging Development
- Creating Investor Intimacy: Compelling Site Visits, Trade Shows, Factory Tours & Conferences
- In the Transaction Trenches
- The 'Right' Approach to Investor Targeting

## PROFESSIONAL & CAREER DEVELOPMENT

- The IR Family Feud
- IR Practitioner Situation Room
- Defining Best in Class IR
- Double Dipping – Combination Jobs for IR Professionals
- Wall Streeters are the New Wave of IROs – What Can We Learn?
- Demystifying the IRC Credential

## SUNDAY SESSIONS

- New to NIRI Conference Orientation Session
- IR Strategy and Planning: IRO "Teach In"
- Global IR Summit
- What to do When the Barbarians are at the Gate – A Shareholder Activism Bootcamp

## PRE-CONFERENCE SEMINARS (separate registration)

- Understanding Earnings
- Think Like an Analyst
- Best in Class Investor Presentations and Investor Days

*See the NIRI Conference event app for updates and details.*

“AlphaSense automates my entire transcript analysis process prior to earnings. I used to spend 10 hours on what now takes 10 minutes.

– Director of IR, Seattle

**AlphaSense, the new “Google” for investor relations,** helps IROs save hours of research time and answer C-suite questions in minutes vs. hours.

AlphaSense® is an intelligent search engine that lets you **search across all the documents you care about at once**, including filings, transcripts, broker research, press releases, company presentations, news, trade journals, web clippings, plus your own uploaded content — and view results on 1 screen.

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# AGENDA-AT-A-GLANCE\*

\* Subject to change

## SATURDAY, JUNE 9, 2018

- 9:00 AM - 5:00 PM** Pre-Conference Seminar: Understanding Earnings (Separate registration)
- 6:30 PM - 9:00 PM** NIRI Volunteer Appreciation Dinner (By invitation only)

## SUNDAY, JUNE 10, 2018

- 8:00 AM - 1:00 PM** NIRI Golf Classic (Separate registration) Bear's Best Golf Club
- 8:30 AM - 12:30 PM** Best In Class Investor Presentations and Investor Days (Separate registration)
- 8:30 AM - 1:30 PM** Think Like an Analyst (Separate registration)
- 1:00 PM - 3:00 PM** IR Strategy and Planning: IRO "Teach In"
- 1:00 PM - 3:00 PM** Shareholder Activism Bootcamp
- 3:00 PM - 5:00 PM** Global IR Summit
- 5:00 PM - 6:00 PM** IRC Reception (By invitation only)
- 6:00 PM - 7:30 PM** IR Showcase Opening and Welcome Reception

## MONDAY, JUNE 11, 2018

- 6:30 AM - 7:30 AM** Yoga
- 7:00 AM - 6:00 PM** IR Showcase Open
- 7:30 AM - 8:30 AM** Breakfast in the IR Showcase
- 8:30 AM - 11:20 AM** General Sessions
- 11:20 AM - 1:20 PM** Lunch in the IR Showcase
- 12:00 - 1:00 PM** Senior Roundtable Luncheon (Senior Roundtable members only)

- 1:20 PM - 5:20 PM** Concurrent Sessions
- 2:50 PM - 3:10 PM** Break in the IR Showcase
- 5:30 PM - 6:30 PM** Evening Reception

## TUESDAY, JUNE 12, 2018

- 6:30 AM - 7:30 AM** Fitness Bootcamp
- 7:00 AM - 6:00 PM** IR Showcase Open
- 7:30 AM - 8:30 AM** Breakfast in the IR Showcase
- 7:30 AM - 8:30 AM** NIRI NextGen Breakfast (IR professionals with less than 5 years experience)
- 7:30 AM - 8:30 AM** Senior Roundtable Breakfast (By invitation only)
- 8:30 AM - 10:30 AM** General Sessions
- 10:30 AM - 11:00 AM** Break in the IR Showcase
- 11:00 AM - 12:00 PM** Industry Breakouts and Networking
- 12:15 PM - 1:15 PM** Lunch & Learn - Thought Leader Sessions
- 1:30 PM - 4:00 PM** Concurrent Sessions
- 2:30 PM - 3:00 PM** Break in the IR Showcase
- 4:10 PM - 5:10 PM** General Session
- 5:30 PM - 6:30 PM** Closing Reception in the IR Showcase

## WEDNESDAY, JUNE 13, 2018

- 7:30 AM - 8:30 AM** Breakfast
- 8:30 AM - 9:30 AM** Concurrent Sessions
- 9:50 AM - 12:00 PM** General Sessions

See the NIRI Conference event app for updates and details.

# EXHIBITORS & SPONSORS

**The world's largest IR Services Showcase:** a solution-filled exhibit hall with a world-class array of products, services, and information.

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## Respect Our Community at #NIRI18

The conference is focused on thought leadership. Only exhibiting companies may engage attendees in the exhibit area. Attendees are asked to only accept invitations to events from service providers who are sponsoring or exhibiting at the conference. Service and product solicitation is not appropriate by any company not sponsoring or exhibiting. Please respect our community and notify NIRI staff of violations.

## NETWORKING & NEW EXPERIENCES

In addition to dozens of educational sessions, explore the new experiences that will help you connect with your peers, discover solutions, and learn in new ways, including Live Media Training, IR Sales Training, Industry Breakouts, evening receptions, and those below.



Leverage this new unique opportunity to interact with IR experts in a space designed to facilitate networking and reflection around your career trajectories and pathways to success.



Sit for a professional makeup session and a headshot by an expert portrait photographer at NIRI's new Headshot Lounge.



Enjoy NIRI's first ever adaptation of the classic game show to see what the "Survey Says"!



Participate in this carefully structured, collaborative session to solve real-life IR challenges in a consultation-style setting.



### IRC LOUNGE

Stop by the IRC Lounge to learn all you need to know about NIRI's Investor Relations Charter (IRC®). Do you plan to take the IRC exam and have questions on how to prepare? Are you already an IRC credential holder and need guidance on maintaining your credential? The IRC Lounge will offer plenty of opportunities to get information in an informal setting. **By attending the NIRI Annual Conference, IRC credential holders can earn up to 4 professional development units (PDUs) per day and cover the required IR competencies.** IRC credentialed volunteers and speakers can also earn PDUs. For more information, visit [www.niri.org/certification](http://www.niri.org/certification).

### NEW NIRI MEMBER DIRECTORY

NIRI's new integrated online portal offers a much more powerful NIRI member directory. Available exclusively to NIRI members, this new mobile-friendly tool provides a richer online member profile including headshot photos, social media handles, and the ability to search for members by areas of IR expertise and more. Login at [www.niri.org](http://www.niri.org) and update your profile now.

### SILENT AUCTION

100% of the net proceeds from the NIRI silent auction at #NIRI18 will benefit the **Route91Strong Foundation**, a non-profit organization that supports survivors of the Las Vegas Route 91 shootings and other violent incidents. There are an exciting array of items to bid on available in the foyer adjacent to Lafite Ballroom.

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