

CONNECT WITH THE COMMUNITY AT THE 2023 NIRI ANNUAL CONFERENCE



Community, learning, networking, and career-building take center stage June 6-8 in Chicago for the world's largest gathering of IR professionals.

BY AL RICKARD, CAE

IR PROFESSIONALS spend almost all their time serving and attending to a range of stakeholders—investors, analysts, management, activists, ESG reporting services, the SEC ... and the list goes on.

So at least once per year, they should take time to serve their one indispensable resource: themselves.

That opportunity is now upon us at the 2023 NIRI Annual Conference, from Tuesday, June 6 through Thursday, June 8 in Chicago. This is the most important must-attend event of the year, and hundreds are already registered and looking forward to reconnecting with the tight-knit, supportive IR community that is essential for building and advancing careers.

The NIRI Annual Conference Committee has planned a robust program filled with learning opportunities from thought leaders in every sector of the investor relations universe from capital markets to environmental, social and governance (ESG). The detailed program and schedule is available at www.niri.org/conference.

"We are thrilled with the caliber and diversity of speakers who will lead our learning programs at the conference," says Committee Chair Hala Elsherbini, NIRI Fellow and Senior Director, Investor Relations at Tyler Technologies, Inc. "Everyone will benefit from the in-depth balanced perspectives that these experts will present."

Committee Vice Chair Patrick Davidson, NIRI Fellow and Senior Vice President, Investor Relations at Oshkosh Corporation, adds, "Every IR professional I know can tell me a story about how personal peer-to-peer connections helped them immeasurably in their careers, and that's exactly what the NIRI Annual Conference offers. This is the only place to experience this level of in-person interaction and engagement."

Mark Fasken, Committee Vice Chair and Chief Operating Officer and Co-Founder at Irwin, says, "Remember the energy and excitement last year when the conference returned to an in-person event after the pandemic? That's going to be there again this year. The IR Showcase—where we all gather and learn about new products and services—will again offer plenty of focused learning opportunities and interactive discussions. So take advantage of those."

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Tackling the Big Issues

Everyone knows that the IR profession faces more critical issues than ever before. That's why the 2023 NIRI Annual Conference General Sessions will dive into these topics:

- Perspectives on ESG Investing
- Predicting the Unpredictable Economy
- Understanding Evolving Regulations
- Leading Through Volatility
- Navigating Capital Markets
- Demystifying the Confusing Buy Side
- Creating Systemic Change

Each of these is profiled below along with the expert speakers who will address them.

An Asset Manager's Perspective on ESG Investing

This conversation will help IR professionals gain a deeper understanding of where to focus ESG disclosure efforts, how ESG information can affect investment decisions, and how to effectively manage ESG-related investor engagement.

- 1** Mindy Lubber, Chief Executive Officer and President, Ceres
- 2** Daniel Nielsen (Moderator), Managing Director, ESG, Clermont Partners

Predicting the Unpredictable: The Economic Outlook For 2024 and Beyond

This session offers timely insights and commentary on key indicators, actions of the Federal Reserve, and the financial markets. Volatility has plagued the global economy throughout 2022 and 2023 and this session will discuss what to expect in the coming years and how to prepare.

- 3** Richard de Chazal, Macro Analyst, William Blair & Company

NIRI Update and What's New in Washington

NIRI executives will speak on key regulatory developments, including the SEC's proposed rule on climate change disclosure and related NIRI advocacy efforts.

- 4** Matthew D. Bruschi, CAE, President & CEO, NIRI
- 5** Niels Holch, JD, Vice President, Public Policy and Advocacy, NIRI
- 6** Katie Royce, CFA, CFO, Zenbusiness, NIRI Board Chair

Lessons From the C-Suite: Successfully Leading in Times of Volatility

Organizations in all sectors have recently experienced dramatic volatility driven by a variety of disruptive socioeconomic, geopolitical, technologic, and other factors. This session brings together c-suite executives to discuss how they've successfully led organizations through times of disruption.

- 7 Ann O'Hara, President, North America, Huhtamaki
- 8 Dirk Locascio, Chief Financial Officer, U.S. Foods
- 9 Matthew Levatich, Former President & Chief Executive Officer, Harley-Davidson, Inc.
- 10 Patrick Davidson (Moderator), Senior Vice President, Investor Relations, Oshkosh Corporation

Navigating the Market with IR on the Front Line

IR professionals must understand trading mechanics, trading trends, related regulatory developments and more. Equity market structure has undergone significant evolutionary change over the past several decades, and the SEC's late-2022 market structure rulemaking proposals, if enacted, promise further fundamental transformation. This session will shed light on current market structure, proposed changes, intended and potential unintended effects on investors, and ultimately on the shares of public companies.

- 11 Joe Mecane, Head of Execution Services, Citadel Securities
- 12 Jennifer Hadiaris, Managing Director, Head of Global Market Structure, Cowen
- 13 Kevin Tyrrell, Head of Equities Strategy and Research, NYSE
- 14 Phil Mackintosh, Chief Economist, Nasdaq
- 15 Brian Sullivan (Moderator), Senior National Correspondent, CNBC

Demystifying Hedge Funds and the Increasingly Confusing Buy Side

The buy-side is evolving and traditional labels in the industry no longer tell the whole story. Long-only investors are integrating alternative products within their mandates and the big hedge funds are getting bigger



Smile for Your Photo in the Headshot Lounge

When's the last time you had a portrait photo taken? Take advantage of a free, convenient opportunity to have a high-quality portrait taken during the NIRI Annual Conference.

Visit the NIRI Headshot Lounge in the IR Showcase to sit for a professional makeup session and a headshot by an expert portrait photographer. It only takes a few minutes.

by expanding the strategies they employ. The "hedge fund" label is often used as a catch-all in the IR community to refer to "an institution that can short my stock" but alternative strategies and shorting is no longer a hedge fund-only practice.

This session features key personnel from some of the more complex buy-side firms to discuss the evolution of their investment strategies and how this specifically impacts their meetings with companies. It will also cover how investors short stock, why they do it, how it plays into their risk management, and strategies around how to work with these firms.

- 16 Bill Wappler, Partner, Director of Research, Balyasny Asset Management L.P.
- 17 Edward Young, Head of Corporate Access & Research and Head of the London Office, Norges Bank Investment Management
- 18 Elizabeth Librizzi, Senior Vice President, Head of Corporate Access and Advisory Services, AllianceBernstein
- 19 Mark Pellegrino (Moderator), Chief Executive Officer, CorpAxe

Creating Systemic Change - Being the Change You Wish to See in the World

This session shines a spotlight on people who have broken barriers and created systemic change in the world of finance, asset management, and investor relations. Learn how they succeeded through their own passion, leadership and sheer will to be the change they wished to see in the world.

- 20 Kim Folsom, Co-Founder, Chairperson, and CEO, Founders First Capital Partners
- 21 Lisa Dyson, PhD, CEO and Founder, Air Protein
- 22 Meredith Sumpter, CEO, Coalition for Inclusive Capitalism
- 23 Margaret Foran (Moderator), Chief Governance Officer, VP and Corporate Secretary, Prudential Financial

Enjoy the Downtown Chicago Waterfront

NIRI selected Chicago as the site of the 2023 Annual Conference because of its pedigree as a business hub, its central location, and the meeting site in the center of the nation's third-largest city. The conference will be held at the Sheraton Grand Chicago Riverwalk Hotel in the heart of the River North District just steps from the Chicago River.

A highlight of the conference is the Closing Reception on Thursday evening on the Chicago River waterfront, featuring a local jazz and blues musician and Chicago cuisine.

More Learning Opportunities

Beyond the General Sessions, the NIRI Conference offers these many additional learning opportunities to address important IR issues from many perspectives. They include:

- Three **Pre-Conference Sessions** on Tuesday afternoon are included in the conference registration. These interactive, workshop-style sessions will take a deep dive into important IR tasks.
- Twenty-two **Concurrent Sessions** covering a wide range of IR and capital markets trends. They align with the domains of the IR Competency Framework and deliver ideas and strategies to conquer real-world IR challenges.
- Four **Thought Leader Sessions** that explore cutting edge IR trends, practical tips, and best practices. These are offered by NIRI Conference sponsoring partners.
- Nine **Express Talks**, also delivered by sponsoring partners, which are short, concise presentations held in the IR Showcase during exhibition hours.
- Sixteen **Industry Breakout Discussions** only for IR practitioners that provide a relaxed setting to meet and network with industry peers to discuss hot topics and trends affecting specific industries or other peer groups.
- Seven **Career Development Hub and IRC® Lounge Discussions**. These informal presentations and discussions are unique opportunities to interact with IR experts in a space designed to facilitate networking and

NIRI Annual Conference Committee

NIRI thanks the following members of the NIRI Annual Conference Committee for their ongoing efforts to develop NIRI2023:

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Hala Elsherbini, NIRI Fellow, Senior Director, Investor Relations, Tyler Technologies, Inc.

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Patrick Davidson, NIRI Fellow, SVP, Investor Relations, Oshkosh Corporation

Mark Fasken, COO and Co-Founder, Irwin

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Lucia Domville, Managing Director, Grayling

Jordyn Eskijian, Senior Financial Analyst, Investor Relations, H&R Block

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Rachael Zahn, VP, Marketing: IR & Corporate Comms, Investis Digital

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John Moten, IRC, Senior Vice President of Investor Relations, Aventiv Technologies, NIRI Board Chair-Elect

Katie Royce, CFA, Chief Financial Officer, Zenbusiness, NIRI Board Chair



reflection around career trajectories and pathways to success, including information for those seeking the IRC credential.

Find Partners in the IR Showcase

Finding the right solutions is essential for IR professionals. That’s why NIRI designed the IR Showcase to be a one-stop destination to find the right product and service providers to meet every challenge.

Evening networking receptions on Tuesday and Wednesday will also be held in the IR Showcase, offering an excellent opportunity to make peer-to-peer connections.

The NIRI sponsoring partners in the IR Showcase offer products and solutions that are specifically designed to support the IR community. This year, the IR Showcase has been refocused to make it easier for IR professionals to discover the best that the industry has to offer.

See the sidebar, “Diamond, Platinum, Gold, and Silver Sponsoring Partners,” for a complete list of companies that will be part of the IR Showcase. The sponsoring partners and links to their websites

are also shown online at www.niri.org/ac23sponsors.

Honoring IR Professionals

The Wednesday morning General Session is an opportunity to honor outstanding achievements by NIRI members.

New NIRI Fellows, new IRC holders, the 2023 class of Rising Leaders Under 40, and winners of the DeWitt C. Morrill IR Update Editorial Excellence Awards will be recognized.

Registration is Still Open

There is still time to register for the 2023 NIRI Annual Conference at www.niri.org/ac23registration. Registration includes full and open access to general sessions, concurrent sessions, Tuesday afternoon Pre-Conference Sessions, the IR Showcase and select networking events. As applicable, breakfast, lunch, evening receptions and breaks are also included. Registrants will also receive online access to conference materials and the NIRI Events App.

For hotel reservations, visit www.niri.org/ac23hotel. [IR](#)