CONFERENCE PROGRAM

LARGEST EVENT FOR THE GLOBAL IR COMMUNITY

2016 NIRI ANNUAL CONFERENCE

JUNE 5-8, 2016, MANCHESTER GRAND HYATT
SAN DIEGO, CALIFORNIA

ECONOMICS AND MARKETS • MARKETING OUTREACH AND STAKEHOLDER COMMUNICATIONS
PROFESSIONAL DEVELOPMENT • CORPORATE GOVERNANCE AND REGULATORY

NIRI
ANNUAL CONFERENCE
JUNE 5–8 • SAN DIEGO, CA
2016

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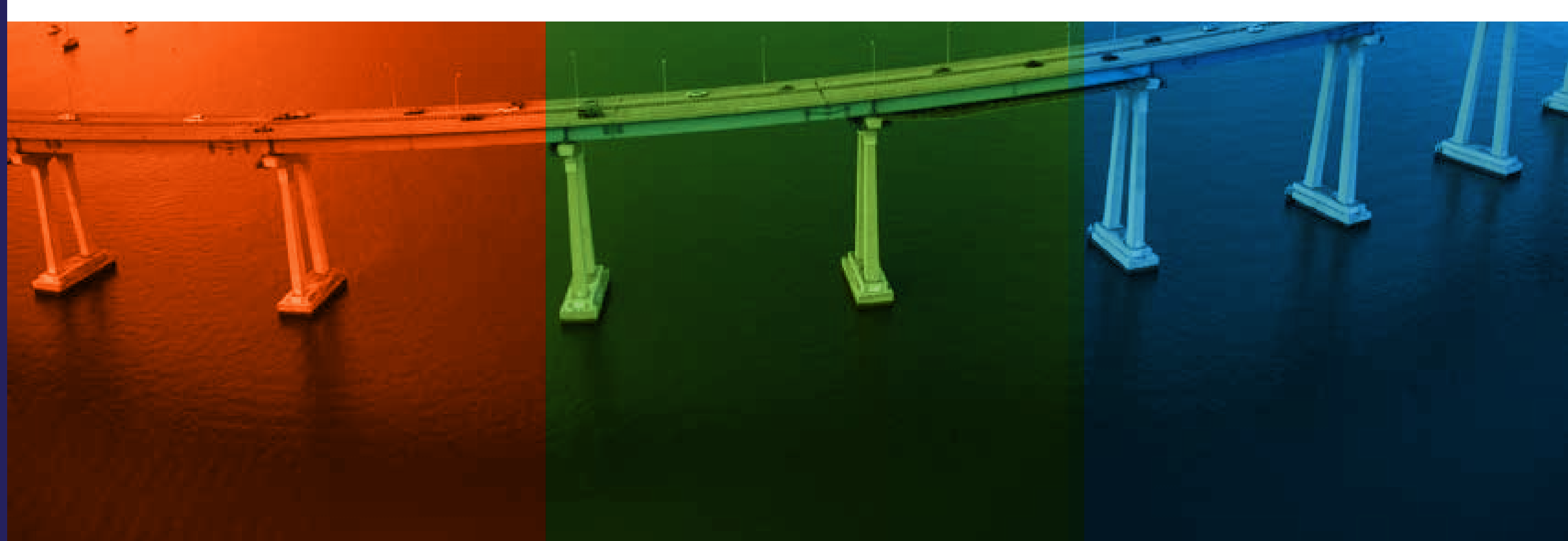

Becoming the "Best of the Best"

Those of us over a certain age will find it depressing to do the mathematics and calculate that the movie *Top Gun* was playing in theatres exactly 30 years ago. But it's a movie that I would venture to guess transcends generations and I think serves as an appropriate theme to the 2016 NIRI Annual Conference.

"You are the top 1 percent of all naval aviators. The elite. The best of the best."

Those are the words of actor Tom Skerritt portraying naval aviator and Commander Mike "Viper" Metcalf in the iconic movie, addressing an incoming class of pilots who seek to take their skills to a higher level en route to one of them earning the distinction of "Top Gun." Many of the flight scenes from the movie were shot at Miramar Naval Air Station, which also is the flight school upon which the story is based. Miramar is situated right here in San Diego.

While it would be all too easy to descend into cliché here—and we no doubt will throughout the week with our *Top Gun* references—I do think there are some similarities to be drawn between the 2016 NIRI Annual Conference and the movie. Most notably, this week, we indeed will honor the "best of the best," this in at least a couple of different ways.

First, we will honor a new slate of NIRI Fellows, luminaries who have earned special distinction for their accomplishments within and their service to the investor relations profession.

Second, we will congratulate the first-ever group of IR practitioners that has passed the inaugural Investor Relations Charter (IRC) Exam.

But each of you aspire to be the "best of the best" and will be here in San Diego to acquire knowledge, to learn from each other, and otherwise to advance your skills as navigators and pilots (sorry, couldn't resist) of your companies' or clients' IR strategy.

As the week's activities unfold, we each owe our thanks to the Annual Conference Committee that put together such a strong program of education and networking with a whole lot of fun in between.

Have a great Annual Conference.

Jim Cudahy, CAE
President & CEO

GENERAL INFORMATION

Wear Your Badge at All Times

The NIRI-provided name badge is required for entry into all areas and meeting rooms. Obtain badge replacements at the registration area. Those who are not registered or do not have a name badge will be escorted from the event by security.

Guest Registration

Guest registration is available to any party not professionally in the field of investor relations or a related discipline. A NIRI member may not be a guest pass recipient. All guests of registrants must register separately in order to participate in evening events. The guest fee is $100 and allows access to Conference evening events only. Guest registrants may not attend any session, breakfast, lunch, sporting event, or workshop. To register a guest while at the Conference, please visit the registration desk.

Emergency Situations

Dial 55 on any Hyatt house phone.

Special Needs

Please visit the registration area in person during registration hours with special needs requests.

IR Showcase Giveaway

Don't miss your opportunity to win great prizes from NIRI! During the Showcase hours, visit every booth in the IR Showcase to get your card stamped. Return your card to the NIRI Booth (Palm Foyer) by Tuesday, June 7 at 3 pm. The prize drawing will occur at the Tuesday closing reception in the IR Showcase – and you must be present to win! Game cards are available at Registration or the NIRI Booth. *One entry (card) per person – one prize per person.*

A “Less-Paper” Conference

Like all of its members' corporate social responsibility initiatives, NIRI strives to reduce the environmental impact of our Conference. Session handouts and speaker biographies are available on the NIRI website and conference app. Available sessions will be archived for replay by registrants on the NIRI Annual Conference website within a month following the Conference. Registrant log-in is required to access the Conference materials: and you must be a 2016 NIRI Annual Conference registrant, did not cancel your registration, and have a valid email address in your NIRI profile.

NIRI Body of Knowledge

NIRI has published the *Body of Knowledge* reference book to give an indication of the scope and range of topics covered on the Investor Relations Charter (IRC™) certification examination, and to help users identify areas that require study and preparation. Because the IRC exam is experience-based, the *Body of Knowledge* is not intended, in and of itself, to be a sufficient study guide to attain the IRC certification.

Professional Development Units (PDU)

The certification renewal program is currently under development. IRC credential holders can claim the professional development activities they have completed after the effective date of their certification. Such activities should relate to the investor relations profession and meet the established standards of the program (e.g. attending the NIRI Annual Conference, webinars, NIRI membership, etc.).

Continuing Professional Education (CPE)

NIRI professional education may qualify for CPE credit based on requirements set forth by the Board of Accountancy issuing the CPA license. Though NIRI is not a licensed provider of CPE credits per the National Association of State Boards of Accountancy (NASBA), please confirm these requirements before registering for a NIRI event to be submitted for CPE credit.

Attendees are responsible for submitting the required documentation to the appropriate Board of Accountancy. NIRI will provide a Certificate of Registration to those who register and attend a NIRI in-person event.

Conference Attire

Conference attire is business casual.

Fun in San Diego

America's Finest City is hosting The World's Largest IR Event. Your journey may start at this year's NIRI Annual Conference, but it doesn't have to end there. From the craft beer scene to the city's hidden gems, take advantage of San Diego's must-see attractions, breathtaking views, and family-friendly hangouts. There is an adventure for everyone, so check out our online San Diego insider's guide. *Brought to you by KCD PR in partnership with NIRI.*

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Photographic and Video Permission

By attending the 2016 NIRI Annual Conference you grant NIRI specific permission to publish, copyright, distribute and/or display photographic or video images of you. Images may be used in promotion material, education session replay, publications, or other applications.

Plug In

Share every idea, tool and tip you hear and make your digital presence known.

- Twitter: #NIRI, @NIRI_National
- eGroups: Connect at http://community.niri.org
- Facebook: www.facebook.com/NIRI.National
- LinkedIn: Join NIRI's member group and connect with other attendees

CONFERENCE APP

App Password: @NIRI2016

The NIRI Conference app provides the most up-to-date information, including the latest session descriptions, speaker information, agenda, slide presentations and maps. Registrant log-in is required.

WI-FI:

SSID: NIRIAC2016 | Password: @NIRI2016

Program details as of May 24, 2016

ANNUAL CONFERENCE COMMITTEE

The Annual Conference is made possible by a volunteer committee of your respected peers. Please thank them for their commitment to bring to our community the world's most comprehensive IR event.

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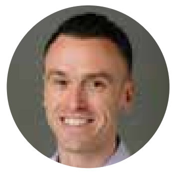
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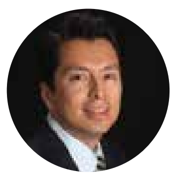
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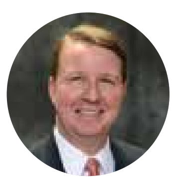
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AGENDA-AT-A-GLANCE

SUNDAY, JUNE 5

6:30 AM - 1:15 PM	NIRI Golf Classic (separate registration)
10:00 AM - 1:00 PM	Chapter Leadership Meeting (by invitation)
11:00 AM - 8:00 PM	Conference Registration
1:00 - 3:00 PM	Conference Workshops
3:00 - 5:00 PM	Global IR Summit
5:00 - 6:00 PM	Global IR Summit Reception
6:00 - 8:00 PM	Welcome Reception in IR Showcase

MONDAY, JUNE 6

6:00 - 7:00 AM	Fitness Activity: Yoga (separate registration)
7:30 AM - 5:00 PM	Conference Registration
7:30 - 8:15 AM	Breakfast in IR Showcase
8:15 - 10:30 AM	Welcome and General Sessions
10:30 - 11:15 AM	Morning Break in IR Showcase
11:30 AM - 12:30 PM	Concurrent Breakout Sessions
12:30 - 1:45 PM	Lunch in IR Showcase
2:00 - 3:00 PM	Concurrent Breakout Sessions
3:00 – 3:45 PM	Afternoon Break in IR Showcase
4:00 – 5:00 PM	Industry Round Tables
6:00 - 8:00 PM	Networking Reception and Fearless Leadership Session

TUESDAY, JUNE 7

6:00 - 7:00 AM	Fitness Activity: Fun Run (separate registration)
7:30 AM - 5:00 PM	Conference Registration
7:30 - 8:00 AM	Breakfast in IR Showcase
8:00 - 8:20 AM	NIRI Fellows and IRC Recipients Recognition
8:20 - 10:45 AM	General Sessions
10:45 - 11:30 AM	Morning Break in IR Showcase
11:30 AM - 12:30 PM	Concurrent Breakout Sessions
12:30 - 1:30 PM	Lunch in IR Showcase
1:30 - 2:30 PM	Thought Leadership Sessions
2:30 - 3:00 PM	Afternoon Break in IR Showcase
3:00 - 4:00 PM	Concurrent Breakout Sessions
4:15 - 5:15 PM	Topic Round Tables
5:15 - 6:30 PM	IR Showcase Closing Reception and Prize Giveaway
EVENING	Open night for attendees to explore San Diego

WEDNESDAY, JUNE 8

7:30 - 10:00 AM	Conference Registration
7:30 - 8:00 AM	Continental Breakfast
8:00 - 9:00 AM	General Session
9:15 - 11:15 AM	Conference Workshops

* SUBJECT TO CHANGE

CONFERENCE WORKSHOPS AND SESSIONS

SUNDAY, JUNE 5

WORKSHOP: LEARN HOW TO MODEL AND DO IT RIGHT

Primary Track: Economics and Markets

1:00 – 3:00 PM; Room: Grand Hall A

Fast track your career through financial modeling and quickly become an expert in your industry. Financial modeling is one of the primary functions in sell-side equity research. The most important ideas, opinions, and an overall investment thesis about a company are derived and even communicated through financial models. Because of this complex function, modeling is less about getting it "right" with the perfect Excel spreadsheet and formulas, but more about understanding whether the model achieves its goals, supports the overall thesis on a company, and paints a picture of future expectations. Once a sell-side analyst has initiated coverage on your company, it is important that the investor relations professional understands the model. Learning and understanding the model will give the company great insight into how that particular analyst is communicating your story to Wall Street stakeholders, which in turn, provides great internal value to the company. Through this process, you will get up to speed quickly on your industry and become an expert through modeling!

Learning Objectives

› Learn about different valuation models
› Learn whom to talk to and the right questions to ask to up-to-speed on your company's industry
› Create a model that demonstrates the assumptions built into your company's current stock value

Speaker(s):

- Amy Conrad, Founder & CEO, Juniper Point (Moderator)
- Liana Moussatos, PhD, Managing Director, Equity Research, Wedbush Securities
- Mark Vignola, PhD, Director, Investor Relations, Intercept Pharmaceuticals

WORKSHOP: OVERVIEW OF KEY CORPORATE GOVERNANCE AND REGULATORY ISSUES AND WHAT YOU NEED TO KNOW TO KEEP ACTIVISM AT BAY

Primary Track: Corporate Governance & Regulatory

1:00 – 3:00 PM; Room: Grand Hall B

IROs need to stay on top of key corporate governance issues and regulations that may influence shareholder behavior, as well as gain insight into how to put in place a corporate governance plan help keep to ensure activist campaigns stay at bay.

Learning Objectives

› Gain an understanding of what to expect when it comes to forthcoming corporate governance issues and regulations
› Learn how to create a game plan to help prepare for activist campaigns
› Gain an understanding of how to know if an activist has your company in his or her line of sight

PART 1: OVERVIEW

Attendees will learn about key corporate governance issues and regulations that are looming. It's hard enough to stay on top of a robust IR program, not to mention the myriad of forthcoming corporate governance initiatives. Today's IROs face a wide array of complex tasks, and corporate governance, in particular, overlaps into investor relations duties and functions. Why has governance become such an integral part of investor relations, and vice versa? How did we get to this point? Part I of the workshop will help answer these questions, and offer the "nuts and bolts" of corporate governance, including its benefits and key principles.

Speaker(s):

- Natalie Hairston, Sr. Vice President, Dennard – Lascar Associates, LLC (Moderator)
- Stephen Cooke, Partner, Paul Hastings
- Richard Grubaugh, Sr. Vice President, DF King
- Jane McCahon, Vice President, Corporate Relations and Corporate Secretary, TDS, Inc.

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NIRI Body of Knowledge Icon Legend: See page 33

SUNDAY, JUNE 5

PART 2: ACTIVISM

Attendees will gain insight into how to create a roadmap to help ensure activist campaigns stay at bay. Additionally, IROs continue to face potential activist campaigns, and it is important to get an understanding of how to put in place a corporate governance plan to potentially ward off or prepare for a campaign before it strikes.

Speaker(s):

- Evan Pondel, President, PondelWilkinson Inc. (Moderator)
- Judith McLevey, Assistant Director, The Conference Board
- Chris Hetrick, Director of Research, Engaged Capital
- Stephen Cooke, Partner, Paul Hastings
- Richard Grubaugh, Sr. Vice President, DF King

WORKSHOP: NAVIGATING THE DANGER ZONE – HOW TO MANAGE CRISIS AND REPUTATIONAL RISK IN A VOLATILE WORLD

Primary Track: Professional Development

1:00 – 3:00 PM; Room: Grand Hall C

The realities of today's operating environment – the volume and complexity of information and the speed at which it travels; always-on, opinion-driven social networks; and the ever-fragmenting media landscape – demand that public companies employ sophisticated systems for managing crises and reputational risk. Given how quickly an issue can turn into a franchise-threatening crisis and the ease with which an activist can launch a campaign, there is little room for error.

Edelman will be running a highly value-added workshop to provide IROs with real-life crisis training. Learn from the experts about "state of the art" crisis and reputational risk management – utilizing real life crisis simulations – in order to hone your skills and understand the key players and roles they play when issues arise. Receive best-practice crisis training to make sure you will be ready when called upon by your management team!

Learning Objectives

› Deepen your understanding of crisis situations and subsequent communications strategy

› Flex your crisis response muscle through a facilitated workshop that will challenge participants to identify and interpret risk in real time

› Hone your ability to effectively weigh impact and assess need across stakeholder groups – from investors to employees to customers

Speaker(s):

- Jaclyn Anderson, Sr. Vice President, Edelman Crisis & Risk Management

GLOBAL IR SUMMIT WORKSHOP

BNY MELLON

Primary Track: Marketing Outreach & Stakeholder Communications

3:00 – 5:00 PM; Room: Grand Hall D

This two-part workshop will focus on three areas: messaging, peer/market intelligence and international marketing.

PART 1: ACCESSING THE GLOBAL POOL OF INVESTORS

IROs are increasingly seeking opportunities to diversify their shareholder bases by marketing outside of their home countries. Investors too are looking for international investment ideas. With a growing number of companies looking to access capital outside of their home countries, it is important for IROs to understand how investors utilize intelligence and make investment decisions, as well as how that differs by region. How do you differentiate your company to capture investors' attention? The first half of this workshop will focus on refining your strategy to address a more global audience.

Learning Objectives

› Learn to leverage relationships with sell-side and buy-side corporate access teams to get the most out of your roadshows

› Understand what investors look for in international equities and how to determine if marketing to international investors is right for your company

› Tips on targeting international investors and planning roadshows outside of your home markets

CONTINUED >

SUNDAY, JUNE 5

Speaker(s):

- Gary Dvorchak, Managing Director, The Blueshirt Group Asia (Moderator)
- Mark Pellegrino, Managing Director, Head of Corporate Access and Relations, Balyasny Asset Management
- Hayley James, Director Corporate Access, Bank of America Merrill Lynch
- Michael Hutchens, CFA, Director of Investments, Brandes Investment Partners

PART 2: TAKE YOUR INVESTOR OUTREACH PROGRAM GLOBAL

Marketing overseas can be costly and time consuming. In addition, there are many macro factors that affect a company's valuation and results that are out of management's control. Your messaging should address these issues head-on (i.e. slowdown in China, currency fluctuations, oil prices). What are the effective strategies that IROs have put in place to maximize return on their investments (i.e. stock surveillance, reverse roadshows, translation of materials)? The second half of this workshop will focus on messaging and roadshow development, including considerations for a global IR strategy, and what IROs can do to help attract international investors.

Learning Objectives

› Factors IROs should consider when taking their programs global
› How to refine your investment story to address a more global audience
› Tips on targeting international investors and planning roadshows outside of your home markets

Speaker(s):

- Karen Lang Bodner, Sr. Capital Markets Advisory Specialist, BNY Mellon (Moderator)
- Mickey Foster, Vice President, Investor Relations, FedEx Corporation
- Ricardo Marine, Investor Relations Manager, BBVA
- Eduardo Galvao, Investor Relations Manager, JBS
- Kedar Shirali, Head Global Investor Relations, Tata Consultancy Services

MONDAY, JUNE 6

FITNESS ACTIVITY: YOGA

6:00 – 7:00 AM; Location: Pool Deck
Pre-registration required

BREAKFAST

7:30 – 8:15 AM; Room: Seaport Ballroom & Foyer

WELCOME

8:15 – 8:30 AM; Room: Harbor Ballroom

Speaker(s):

- Jim Cudahy, CAE, President & CEO, National Investor Relations Institute

GENERAL SESSION: WHAT THE FINANCIAL MARKETS ARE TELLING US NOW!

Computershare | Georgeson

8:30 – 9:30 AM; Room: Harbor Ballroom

Portfolio managers and individual investors are being bombarded with (mostly negatively skewed) financial news. It is often tough to separate the important considerations from all the noise. During this session you will learn tips and strategies to distinguish and manage the important news from the noise.

Speaker(s):

- Peter Ricchiuti, Professor of Finance, Tulane University

MONDAY, JUNE 6

GENERAL SESSION: A FIRESIDE CHAT WITH BLOOMBERG'S EDITOR-IN-CHIEF, JOHN MICKLETHWAIT

Computershare | Georgeson

9:30 – 10:30 AM; Room: Harbor Ballroom

With both the Republican and Democrat National Conventions weeks away, what's the current outlook on the U.S. general election and how the likely nominees might impact the economic environment? How will President Obama use his famous 'pen and phone' in his last few months in office and what might that mean for U.S. businesses? What are the practical implications of a world where publishers like WikiLeaks and the Panama Papers may make it nearly impossible for governments, corporations, and individuals to keep secrets? What are the next frontiers for financial reporting? Join John Micklethwait, Editor-in-Chief of Bloomberg News, for a fireside chat moderated by Bloomberg's Jason Kelly, New York Bureau Chief, that will address these issues and more, including questions from the audience.

Speaker(s):

- Jason Kelly, New York Bureau Chief, Bloomberg (Moderator)
- John Micklethwait, Editor-in-Chief, Bloomberg

BREAKING THROUGH THE NOISE: LATEST TRENDS IN FINANCIAL REPORTING

Primary Track: Marketing Outreach & Stakeholder Communications

11:30 AM – 12:30 PM; Room: Grand Hall A

Let's face it - the quarterly reporting process can be pretty dull - and we have all "been there, done that." However, in the last couple of years, some rather interesting innovations are happening – new earnings PR disclosure trends (leveraging social media), "infographic style" press releases that provide a snapshot for rapid read and recall data, enhanced technology for pre-recorded earnings calls and video interviews, optimized conference calls with a "Q&A only" approach, and new trends in following up on the earnings call in good times and bad. Quarterly reporting is undergoing significant change and this session will help you think through when – or if – some of these new approaches might work for you and your management team. Walk away with a "playbook" of best practices to manage and refresh your successful financial reporting.

Learning Objectives

› Learn about the latest innovations and companies that are stepping outside the traditional quarterly reporting box
› Understand which aspects of the earnings process are most valued by the investment community
› Discover how digital communications can play an important role in the quarterly reporting process

Speaker(s):

- Deb Wasser, Executive Vice President Financial Communications & Capital Markets, Edelman (Moderator)
- Nils Paellmann, Vice President and Head of Investor Relations, T-Mobile US
- Cherryl Valenzuela, Sr. Manager, Investor Relations, Twitter
- Rich Yerganian, Vice President, Investor Relations & Corporate Communication, Xcerra Corporation

THE NEED FOR SPEED – OR NOT. DO WE NEED ANOTHER EXCHANGE?

Primary Track: Economics and Markets

11:30 AM – 12:30 PM; ROOM: Grand Hall B

IEX's application to become a full-fledged exchange has sparked a public conversation about speed and its relevance to today's stock market. Speed is only part of the conversation, however. What about the broader themes to this debate? Join Nasdaq, NYSE, and IEX as they discuss and debate the following topics:

› What role do exchanges play in the primary and secondary markets?
› How do exchanges impact the willingness of all investors to invest and trade in the secondary markets?
› What is Regulation NMS and how does it govern today's stock trading?
› How and why do "flash crash"-type events occur?
› What is the role of high frequency trading (HFT) today?

Learning Objectives

› Understand the role of exchanges in primary and secondary markets
› Learn about Regulation NMS and its impact on today's trading
› Demystify HFT and the various roles it plays in today's markets

CONTINUED >

MONDAY, JUNE 6

Speaker(s):

- Theresa Molloy, Vice President, Governance and Shareholder Services, Prudential Financial (Moderator)
- Stacey Cunningham, Chief Operating Officer, NYSE
- Nelson Griggs, Executive Vice President of Listing Services, Nasdaq
- John Ramsay, Chief Market Policy Officer, IEX

THREE'S COMPANY: DIRECTORS, ACTIVISTS, AND IR IN THE BOARD ROOM

Primary Track: Corporate Governance and Regulatory

11:30 AM – 12:30 PM; Room: Grand Hall C

As the role of investor relations becomes increasingly strategic, IROs are working more closely with their corporate secretaries and boards to inspire confidence about the overall health and long-term plan of the company. But even the best intentions and plans may not be enough to keep activists in check. In this session we'll facilitate an informative discussion covering:

› The IR governance plan - how to collaborate with your corporate secretary to ensure that investor feedback reaches the board of directors.
› The activist readiness plan – how to ensure that your board and management are ready to respond to an activist situation.

Learning Objectives

› Learn how to effectively communicate with the board
› Learn how to prepare your executive management team and board of directors for activists
› Learn how to respond when the activist initiates contact and possibly gains a seat on the board

Speaker(s):

- Peter Michelsen, Partner, CamberView Partners
- Kirt Karros, Sr. Vice President, Finance and Treasurer, Hewlett Packard Enterprise Company
- Chris Hetrick, Director of Research, Engaged Capital
- Neil Russell, Vice President, Investor Relations, Sysco Corporation
- David Hunker, Head of Shareholder Activism Defense, J.P. Morgan Chase & Co.

SELL-SIDE SAVVY – GAIN IT WITHOUT PLAYING ON THE STREET

Primary Track: Professional Development

11:30 AM – 12:30 PM; Room: Grand Hall D

Recent trend studies show an increasing numbers of IROs have Wall Street background, particularly with the sell-side. What is it, if anything, that gives them an advantage? Is it purely financial modeling skills, or a more subtle skillset such as service attitude, communication and sales skills, and relationship building tactics? Can you gain these skills if you have no Wall Street experience? Come find out and add to your IRO skills toolbox.

Learning Objectives

› What is it that differentiates the sell-side from other pre-IR career tracks?
› Do sell-siders have a unique set of skills that they bring to the IR game?
› Learn those skills and how you can use them to improve your IR communication

Speaker(s):

- Rodny Nacier, CFA, Managing Director, ICR (Moderator)
- Sabra Purtill, Sr. Vice President, Investor Relations, The Hartford
- Ben Barrett, Director, Investor Relations, T-Mobile US
- Sarah Bowman, Vice President, Investor Relations, Deutsche Post DHL Group

MONDAY, JUNE 6

24-HOUR NEWS CYCLE – WINNING IN THE RACE TO BREAK NEWS

Primary Track: Marketing Outreach & Stakeholder Communications

2:00 – 3:00 PM; Room: Grand Hall A

Advancements in technology have drastically changed the way people consume media, and how news is reported. For most news organizations, it is a race to be the first to break a story. Due to time constraints, some journalists publish news on social media without thoroughly fact checking and correct the story later if there are any inaccuracies. Unlike print news, web-based media has significantly more longevity and readership. Today, journalists are rated on metrics such as page views, likes, shares, and comments. News organizations have developed analytics to assist in growing their audience and increasing engagement. Negative news (i.e. investigative reporting) that uncovers wrongdoing and Buzzfeed-style reporting often attracts more readers. Less provocative news, such as earnings reports, is slowly being relegated to robo-publishing mechanisms. Understanding what drives today's media and how to interact with financial news outlets is an essential skill for today's IRO. This session will help you better manage your media strategy in an environment that is rapidly evolving due to new technologies.

Learning Objectives

› How IROs should interact with today's financial media
› Tips for drafting news releases to ensure the important messages are reported
› Procedures for correcting inaccurate information published by online news outlets

Speaker(s):

- Tim Human, Editor, IR Magazine (Moderator)
- Russ Britt, Assistant News Editor, Investor's Business Daily
- Jason Kelly, New York Bureau Chief, Bloomberg
- Tom Mallory, Online News Director, The San Diego Union-Tribune

SHORT ATTACKS: THE NEW 'WOLF PACK': BEST PRACTICES FOR PREPARING AND DEFENDING AGAINST A SHORT ATTACK

Primary Track: Economics and Markets

2:00 – 3:00 PM; Room: Grand Hall B

The recent short-seller attack against Valeant has thrust the role of short-sellers in the marketplace back to the forefront. From anonymous blog posts to publicly released white papers and press releases, the ease with which a short-seller can attack a company and the ramifications of the allegations (even if unfounded) are a serious and growing threat. Even after a company responds to criticism from a short-seller, the attack may trigger a downward spiral in stock price that is disproportionate to the original claims. While each short attack is unique, all short sellers have the ability to be disruptive and can pose a serious threat to any company, especially given the lack of disclosure requirements and the potential for highly aggressive campaigns. Short-sellers present a unique challenge for IROs because they are not regular shareholders, but often exert outsized influence on a company's shareholder base. The panel will analyze the complex and changing environment in which short attacks are being carried out and what IROs can do to prepare and defend themselves.

Learning Objectives

› Learn about short attacks, and of the hedge funds and research outlets that have emerged as short sellers
› Learn what you can do to enhance a company's IR program in the face of a short attack
› Learn about the lack of regulation and transparency related to short selling

Speaker(s):

- Eric Brielmann, Partner, Joele Frank (Moderator)
- Clay Jeansonne, Vice President, Investor and Public Relations, LINN Energy
- Michael Mulroy, President, Mulroy Advisors, LLC
- Elizabeth Malone CFA, Sr. Vice President, Investor Relations and Corporate Development, AmTrust Financial Services, Inc.

MONDAY, JUNE 6

PROXY SCAR TISSUE: TALES FROM THE BATTLE GROUND OF THE GOOD, THE BAD, AND THE UGLY PROXY FIGHT

Primary Track: Corporate Governance and Regulatory

2:00 – 3:00 PM; Room: Grand Hall C

Few boards and management teams go completely unscathed when engaging in a proxy contest, although certain companies certainly fair better than others. In this session, expert strategists and executives will share their war stories and provide insight into how to ensure a fight is deftly fought without incurring too many casualties.

Learning Objectives

› Gain an understanding of what works and what doesn't when engaged in a proxy fight
› Learn what steps to take to ensure your company is prepared for a proxy fight or even a settlement before engaging in a fight
› Understand what strategies to consider during the fight and its aftermath

Speaker(s):

- Dennis Gannon, Principal Executive Advisor, Corporate Executive Board (Moderator)
- Christopher Wightman, Partner, CamberView Partners
- Ian Campbell, Vice Chairman, The Abernathy MacGregor Group
- Ken Denman, Director, ShoreTel and United Online, Inc.

NOTHING'S GOING TO STOP US NOW: ADVANCING THE MULTIDISCIPLINARY IRO

Primary Track: Professional Development

2:00 – 3:00 PM; Room: Grand Hall D

Investor relations is quickly becoming a multidisciplinary role where the traditional IR function is either being combined with, or requires knowledge of treasury, strategy, corporate development, governance, and oftentimes economics. Come listen to experienced IROs who have bridged the gap between different disciplines and what they have learned along the way. Learn how to position yourself for these opportunities in order to increase your corporate value. Where can you go both within the IR role and beyond? Send an email to: advancingiros@dhrinternational.com in order to confidentially incorporate your questions into the content of the session.

Learning Objectives

› Learn why a broad skillset outside traditional IR is crucial to advancing your career
› Learn how to position yourself to gain these skills and knowledge base
› Find solutions to taking your career to the next level

Speaker(s):

- Smooch Repovich Reynolds, Managing Director, Investor Relations & Communications Practice, DHR International (Moderator)
- Jane McCahon, Sr. Vice President, Corporate Relations and Corporate Secretary, TDS, Inc.
- Sam Levenson, CEO, Arbor Advisory Group LLC
- Michelle Lewis, Chief Strategy Officer and Sr. Vice President, Corporate Development and Investor Relations, NOW Inc.

INDUSTRY ROUND TABLES

The Industry Round Tables provide a relaxed setting to exchange ideas and network with colleagues in your sector or market capitalization bracket.

4:00 - 5:00 PM

Transportation	Sarah Bowman, Deutsche Post DHL Group	Grand Hall A
Utilities & Power	Scott Cunningham, Edison International	Grand Hall A
Resource Extraction – Mining, Oil, Gas, Metals	Alexandra Deignan, Schnitzer Steel	Grand Hall A
Building Materials & Construction	Mark Warren, Vulcan Materials Co.	Grand Hall A
Telecommunications	Nils Paellmann, T-Mobile US	Grand Hall B
Technology – Internet & Software	Liz Bauer, CSG International	Grand Hall B
Financial Services & Banking	Tim Sedabres, Banc of California	Grand Hall B

CONTINUED >

MONDAY, JUNE 6

Technology: Semiconductors & Hardware	Rich Yerganian, Xcerra Corp.	Grand Hall B
Insurance	Delia Moore, Aflac	Grand Hall C
Medical Technology & Devices	Julie Tracy, IRC, Wright Medical Group N.V.	Grand Hall C
Retail/Consumer Products	Ron Parham, Columbia Sportswear Co.	Grand Hall C
Healthcare/Pharma	Mark Donohue, Ipax Laboratories, Inc.	Grand Hall C
BioPharma	Amy Conrad, Juniper Point	Grand Hall C

NETWORKING RECEPTION & FEARLESS LEADERSHIP SESSION

Q4

6:00 – 8:00 PM *(Leadership Session: 6:30 – 7:30 PM)*; **Room: Harbor Ballroom**

What does flying at Mach 2 in one of the Navy's (and Hollywood's) most famous aircraft, the F-14 Tomcat, have to do with business success? Hear Carey Lohrenz, the U.S. Navy's first female F-14 pilot, discuss the fundamentals of leadership, teamwork, winning under pressure, reducing errors, and overcoming obstacles. Her keynote will challenge, inform, and inspire your team to move to higher levels of performance in these difficult and rapidly changing economic times. Carey will offer bottom-line expertise with clear, realistic takeaways for the audience that can produce both short-term and life changing results.

Speaker(s):

- Carey Lohrenz, Author, Speaker, Aviator

TUESDAY, JUNE 7

FITNESS ACTIVITY: FUN RUN

6:00 – 7:30 AM
Pre-registration required

BREAKFAST

7:30 – 8:00 AM; Room: Seaport Ballroom & Foyer

NIRI FELLOWS AND IRC RECIPIENT RECOGNITION

8:00 – 8:20 AM; Room: Harbor Ballroom

Prior to the day's General Session, join NIRI in recognizing NIRI's newest Fellows and IRC Recipients.

GENERAL SESSION: TELLING YOUR STORY – HOW WE CAN CRAFT BETTER STORIES FOR OUR COMPANIES AND INVESTORS

Computershare | Georgeson

8:20 – 9:50 AM; Room: Harbor Ballroom

How many times have you heard your CEO say "investors just do not understand our story"? For the IRO, stories are your single most powerful communication tool. Stories must have meaning beyond simply "what has happened in your company." Your audience has given their time and attention—an increasingly precious commodity—to listen to your story and you need to deliver the most compelling story possible. By the time the last line is spoken, they should know exactly what you want them to remember and why it's important. Andy Goodman is a nationally recognized author, speaker, and consultant in the field of communications. Best known for his speeches and workshops on storytelling, presenting, and strategic communications, Andy has been invited to speak at Harvard's Kennedy School of Government, the Woodrow Wilson School of Public Affairs at Princeton, and the Graduate School of Business at Stanford University. Join Andy for an informative, must-not-miss session – you will walk away with some of the best advice and actionable tools to make your company story more powerful and memorable.

Speaker(s):

- Andy Goodman, Director, The Goodman Center

TUESDAY, JUNE 7

GENERAL SESSION: FORGING A PATH TO THE C-SUITE – WHAT IROs NEED TO KNOW TO MANAGE THE PROCESS

Computershare | Georgeson

9:50 – 10:45 AM; Room: Harbor Ballroom

A large majority of investor relations professionals view their jobs as a springboard to other corporate positions with many of them aspiring to grab a seat in the C-suite. Drawing from a myriad of experience this panel will explore, both from the CFO and IR perspective, what it takes to move further up the corporate ladder, how your IR expertise can prepare you for the C-suite challenges, and how to know when the time is right to make the move.

Speaker(s):

- Liz Bauer, Sr. Vice President, Chief Communications & Investor Relations Officer, CSG International (Moderator)
- George S. Davis, Executive Vice President & Chief Financial Officer, Qualcomm Inc.
- Christopher T. Young, Executive Vice President, Treasurer & Chief Financial Officer, Entravision Communications Corporation
- Ruth Cotter, Chief Human Resources Officer and Sr. Vice President of Corporate Communications, Investor Relations, AMD

BACK SEAT OR FRONT SEAT? HOW IR CAN PLAY A PIVOTAL ROLE IN THE SUCCESS OF A TRANSACTION

Primary Track: Marketing Outreach & Stakeholder Communications

11:30 AM – 12:30 PM; Room: Grand Hall A

Investor relations plays a significant role in Wall Street's support of major financial transactions, whether a merger/acquisition, IPO or follow-on offering. This session will include viewpoints from all sides of a deal and will present practical advice from preparation to day-of announcement to post-transaction communications, which often times are more critical than the announcement itself. Our panelist's diverse expertise will also focus on how investors and analysts evaluate the success of transaction and issues or concerns that are likely to surface post-announcement, as well as potential pitfalls that may arise if a consistent message and clear benchmarks are not communicated.

Learning Objectives

› Playing a more strategic role in the transaction process – day-one and beyond
› Building credibility with key stakeholders throughout the process, including advisors, management, investors/analysts, and employees
› Communicating a consistent message that supports the rationale of the transaction and evolves with a potentially shifting shareholder base post-transaction

Speaker(s):

- Victoria Sivrais, Founding Partner, Clermont Partners (Moderator)
- David Ethridge, Managing Director in Deals Practice, PricewaterhouseCoopers
- Julie Tracy, IRC, Sr. Vice President, Chief Communications Officer, Wright Medical Group NV
- Eric Boyer, Head of Investor Relations, IHS

FROM TAKEOFF TO LANDING – ACCESSING THE CAPITAL MARKETS

Primary Track: Economics and Markets

11:30 AM – 12:30 PM; Room: Grand Hall B

A nuts and bolts session on how to access the capital markets either through an IPO, a secondary offering, or through a bond offering.

› What you need to do in advance to set the stage for success, including: building a media profile, outreach to the sell side to build relationships, and outreach to institutional investors/bondholders.
› How to understand what external market factors mean for timing of an offering.
› Marketing: how to have a successful road show, how to use the media to your advantage, and how to build the brand.
› Pulling it all together: managing allocations, setting pricing and ringing the bell!

TUESDAY, JUNE 7

Learning Objectives

› What are the stages of the process that need to be managed and how to tackle them in a thoughtful manner to ensure success?
› How to build the team of critical players, including tax, legal, accounting, external advisors, IT, and the banks
› How the IRO can build strong relationships that will be critical long after the offering is complete

Speaker(s):

- Karen Blomquist, Manager, Investor Relations, C&S Wholesale Grocers (Moderator)
- Lise Buyer, Partner, Class V
- Bonnie Monahan, Corporate Finance Executive
- Ben Sykes, Vice President, Debt Capital Markets, J.P. Morgan Chase & Co.
- Jeff Thomas, Vice President, Head of West Coast Listings, Nasdaq

RULES OF ENGAGEMENT HAVE CHANGED: ARE YOU AND YOUR BOARD READY?

Primary Track: Corporate Governance and Regulatory

11:30 AM – 12:30 PM; Room: Grand Hall C

Director engagement with investors can be a tricky task. Effective strategy for highlighting directors' decisions and control is vital. In this session, strategy experts and executives will share their perspectives and provide insight on the best programs to work across the various personalities and agendas — both internally and externally.

Learning Objectives

› Learn best practices for director engagement and how to apply those within your own organization and programs
› Learn trends in governance regarding boards and their interaction with investors
› Learn the role of the IRO in establishing the right balance of engagement

Speaker(s):

- E.E. Wang, Director, Corporate Marketing and Investor Relations, Lantronix Inc. (Moderator)
- Arnie Pinkston, Director, Janus Capital Group
- Chuck Cargile, CFO, Newport Corporation and Lead Independent Director, Netlist Inc.
- Kary Brunner, Director of Investor Relations, Wal-Mart
- Paul Mansky, Founder, Cumulus Advisors

HOW OLD IS YOUR CV? HOW DO YOU GET NOTICED?

Primary Track: Professional Development

11:30 AM – 12:30 PM; Room: Grand Hall D

Do your CV writing skills date back to college? When was the last time you updated your CV content and format? At this workshop we will conduct a series of exercises designed to help you refine and optimize your personal message. You will learn how to ensure that your CV lands on the top of the pile at executive recruiters and is picked up by the recruiter search bots and web crawlers. You should leave the session with the tools and insights to refresh and improve your CV and help you get noticed!

Learning Objectives

› Learn how to best describe your skills and profile in today's CV formats
› Ensure that your CV has the right keywords and format to land first on the pile
› Optimize your CV and avoid common mistakes

Speaker(s):

- Vanessa Charlton, Associate, Heyman Associates
- Ed Lockwood, Sr. Director, Investor Relations, KLA Tencor
- Ruth Cotter, Chief Human Resources Officer and Sr. Vice President of Corporate Communications, Investor Relations, AMD

TUESDAY, JUNE 7

THOUGHT LEADERSHIP SESSION: THE PROS AND CONS OF SOCIAL MEDIA FOR INVESTOR RELATIONS

1:30 – 2:30 PM; Room: Grand Hall A

Is social media a fit for your IR program? How do you know? And if it is, how do you use it? In this session we will break down the pros and cons of social media for investor relations and discuss tactical ways to implement the program right for your company.

Learning Objectives

› The pros and cons of social media
› How to determine if social media is the right channel for you
› How to implement a successful social IR program

Speaker(s):

• Serena Ehrlich, Director of Social and Evolving Media, Business Wire

THOUGHT LEADERSHIP SESSION: EDUCATE TO ELEVATE: BEST PRACTICES AND ACTIONABLE STRATEGIES FOR DEVELOPING AN INDUSTRY-LEADING INVESTOR PRESENTATION

1:30 – 2:30 PM; Room: Grand Hall B

According to our proprietary research, investors consider the investor slide deck as a primary source of information, comparable to meeting with management! Having extensively researched, advised on and executed best-in-class presentations, we will lead an interactive, educational and thought-provoking presentation from which you will learn valuable tips and strategies to help elevate your investment story and differentiate your company as an investment. In addition to providing best-in-class slide examples, topics will include critical content, story flow, and format.

Learning Objectives

› Identify “must have” investor presentation/investment thesis content
› Develop critical messages that resonate with investors
› Understand disconnects between investors, the IRO, and the C-Suite point of view

Speaker(s):

• Rebecca Corbin, Managing Partner, Corbin Perception

THOUGHT LEADERSHIP SESSION: CORPORATE GOVERNANCE & IR: BEST PRACTICES IN INTERNAL COMMUNICATION AND BUY-SIDE OUTREACH

1:30 – 2:30 PM; Room: Grand Hall C

Investor relations officers are more involved today than ever before in dealing with issues involving corporate governance and proxy voting matters. This panel discussion will include senior representation from the investor relations, GC/corporate secretary and the buy-side corporate governance functions. The discussion will aim to establish best practices and give real-world examples of outreach strategies and interactions between IR, the corporate secretary, institutional shareholders, proxy advisory firms and the Board of Directors.

Learning Objectives

› Internal Planning: Best practices on collaborating with your Corporate Secretary and Board to communicate your company’s corporate governance practices to the buy side
› Shareholder Communications: Understand how the most important institutional investors view companies from a governance perspective and interact with portfolio managers to make voting decisions
› Proxy Advisory Firms: An outline of effective strategies on interacting with proxy advisory firms, such as ISS and Glass Lewis, before and after recommendations are made

Speaker(s):

• Chris Taylor, Executive Vice President Global Research, Thought Leadership & Partnerships, Ipreo (Moderator)
• Jack Adams, Sr. Vice President, Associate General Counsel & Securities, Cardinal Health
• Sally Curley, Sr. Vice President, Investor Relations, Cardinal Health
• Sarah Lang, Specialist, Governance & Proxy, Capital Group

TUESDAY, JUNE 7

THOUGHT LEADERSHIP SESSION: TARGETING: IS OUR COMPANY'S PROGRAM COMMON PRACTICE OR BEST PRACTICE?

RIVEL

1:30 – 2:30 PM; Room: Grand Hall D

When you ask IROs what targeting means to them, you will get a wide range of answers. At the core, targeting is one of the most essential elements of an effective IR program and IR dedicates a lot of time and resources to it. In addition, IROs often have to educate their management teams on the buy-side's deliberate and lengthy decision-making process. This reality lends itself to the question IROs often ask: is our targeting program common practice (the way we've always done it) or best practice (what the buy-side defines)? Explore how the targeting landscape is changing since investors only have so much bandwidth and are following over 120 companies on a given day.

Learning Objectives

› What are the most common ways in which public companies proactively reach out to targeted investors? How can you determine what metrics are most appropriate for your company?
› How can you determine what metrics are most appropriate for your company?
› How can the application of both quantitative and qualitative practices help make your program more effective?

Speaker(s):

- Brian Rivel, President, Rivel Research Group, Inc.

DICHOTOMY OF IR ACROSS CAP SIZES: A DEBATE

Primary Track: Marketing Outreach & Stakeholder Communications

3:00 – 4:00 PM; Room: Grand Hall A

When it comes to IR challenges, the answers are not always black or white. While the ultimate goals are mostly the same, how IROs execute their programs can be drastically different depending on the company's market cap, sector and/or corporate style/philosophy. During this election year debate-style session, five IROs representing small, mid and large-cap firms will match wits as they share insight into how they approach various issues including:

› Sell-side coverage
› Non-deal roadshows/conferences
› Targeting
› Earnings process
› IR measurement

Learning Objectives

› Best practices around investor engagement for all size companies
› Measurement tools to gauge the success of your program
› New ways to enhance your investor relations strategies for small to large companies

Speaker(s):

- Neil Stewart, Editorial & Research Director, IR Magazine (Moderator)
- Deborah Belevan, Vice President Investor Relations, Party City
- Michael Weitz, Sr. Vice President, Financial Planning & Investor Relations, WWE
- Cole Lannum, Sr. Vice President Investor Strategy and Investor Relations, Mallinckrodt Pharmaceuticals
- Warren Kneeshaw, Vice President, Investor Relations, Qualcomm
- Karla Kimrey, Vice President, Investor Relations, Cloud Peak Energy Inc.

UNDERSTANDING AND MESSAGING MACROECONOMIC TRENDS ON INVESTOR PERCEPTIONS

Primary Track: Economics and Markets

3:00 – 4:00 PM; Room: Grand Hall B

In today's ever-changing world, global and domestic investors are focused on the impact of events across the globe including oil prices, political instability, and other macro themes. This is often the case even as core company performance and results are excellent. How can an IRO differentiate the company's stock when investor perceptions are impacted daily by global macro events?

CONTINUED >

TUESDAY, JUNE 7

Learning Objectives

› Hear about the current state of global markets and trending macro themes from an expert economist
› Learn how global macro trends around the world impact investor attitude and perceptions
› Learn how companies can position themselves to stand out against challenging macro backdrops

Speaker(s):

- Tim Sedabres, Sr. Vice President, Investor Relations, Banc of California (Moderator)
- Jay H. Bryson, PhD, Managing Director and Global Economist, Wells Fargo Securities
- Alexandra Deignan, Vice President, Investor Relations, Schnitzer Steel
- Carol Schumacher, Vice President, Corporate Affairs, NYSE
- Kate Scolnick, Vice President, Investor Relations, Seagate Technology

CYBERSECURITY: WHAT YOU SHOULD KNOW AS AN IR PROFESSIONAL

Primary Track: Corporate Governance and Regulatory

3:00 – 4:00 PM; Room: Grand Hall C

Who would have thought that a dictator would sabotage the launch of a Seth Rogen and James Franco comedy film? However, that is the world in which we live, and cybersecurity is more than the latest headline or topic dujour. Rather, cybersecurity is a necessary condition for business as we live in an increasingly digital world. What does this mean for investor relations professionals? How can we as investor relations professionals prepare our companies for a cybersecurity breach, and what is required if such an event occurs. In this session, subject matter experts will outline the current state of cybersecurity and related legislation and its impact on companies' and their disclosures.

Learning Objectives

› Learn how cybersecurity has evolved as a threat to companies, their brands and reputations
› Learn how to prepare a cybersecurity breach plan
› Learn how to respond and execute your cybersecurity breach plan

Speaker(s):

- David Young, Vice President, Aflac (Moderator)
- Scott Lindlaw, Principal, Sard Verbinnen & Co.
- Barbara Gasper, Executive Vice President/Group Executive, MasterCard

TOP GUN IR: TAKING YOUR CAREER TO THE NEXT LEVEL

Primary Track: Professional Development

3:00 - 4:00 PM; Room: Grand Hall D

It's a dogfight out there for IR jobs, so how can you best position yourself to advance your career? Are recruiters looking for a Maverick, an Iceman, or neither? Top executive search firms specializing in senior level placements will discuss the mix of skills and experience companies seek in their IROs. Learn about the importance of corporate culture in filling IR roles, identify best fit, and how companies communicate those messages externally. Explore the skill set currently most valued for IR positions and how this can be acquired. Delve into the recent trends favoring the soft and hard skills of the sell-side and whether they are paramount to career advancement. Consider whether further education or certification is a valuable option.

Learning Objectives

› Explore the skill set currently most valued for IR positions and how this can be acquired
› Learn the recent trends regarding specific skill sets and profiles and whether they are paramount to career advancement
› Consider whether further education or certification are valuable options

Speaker(s):

- John Chevalier, Vice President, Global Investor Relations, The Procter & Gamble Company
- Elizabeth Simpson, Partner, Heidrick & Struggles
- Carroll Leatherman, Client Partner, Korn Ferry International
- Alexis Gorman, Co-Founder, Investor Relations & Corporate Communications Practice, Spencer Stuart

TUESDAY, JUNE 7

TOPIC ROUND TABLES

Table Topics address subjects of current interest to provide a broad view of IR best practices and innovation.

4:15 – 5:15 PM

IR Measurements: Quantitative vs Qualitative	Valerie Haertel, BNY Mellon	Grand Hall A
IR Strategic Planning: From Your Budget to Guidance	Jane Okun Bomba, Viacom, Inc.	Grand Hall A
Market Intelligence	Margo Happer, Wyndham Worldwide	Grand Hall A
C-Level IR	Sid Jones, Genuine Parts Co.	Grand Hall B
Corporate Social Responsibility: Investor Interest	Beate Melten, Citi	Grand Hall B
Branding your Career: What's Your Plan?	Carol Murray Negron, Equanimity, Inc.	Grand Hall B
Annual Reports: Current Trends	Tammy Perry, Edwards Lifesciences Corp.	Grand Hall B
Korn Ferry/NIRI Compensation Survey Review	Carroll Leatherman, Korn Ferry International	Grand Hall B
Managing the Sell-side	Hala Elsherbini, Halliburton Investor Relations	Grand Hall C
Activist Investors: How to Prepare	Maureen Wolff, Sharon Merrill Associates	Grand Hall C
Investor Marketing/Roadshows	Dennie Kimbrough, Microsoft Corp.	Grand Hall C
Materiality	Mark Collinson, Compass Investor Relations	Grand Hall C
Dealing with Internet Short Sellers and Retail Investors	Jenny Kobin, Investor Relations Advisory Solutions	Grand Hall C

WEDNESDAY, JUNE 8

CONTINENTAL BREAKFAST

7:30 – 8:00 AM; Room: Harbor Ballroom Foyer

GENERAL SESSION: THE FBI ON WALL STREET

Computershare | Georgeson

8:00 – 9:00 AM; Room: Harbor Ballroom

Ever wonder how the bad guys on Wall Street get caught? The FBI's Fair Markets Initiative focuses its insider trading efforts by prioritizing cases and enhancing collaboration with the Securities and Exchange Commission (SEC). You will not want to miss David Chaves talk about the intelligence, as well as the sophisticated techniques the FBI uses to identify the most egregious insider trading offenders. David will discuss some of the most infamous insider trading cases during the past five years, how to manage the "tone at the top" for companies, and how to develop the policies and procedures needed to deter insider trading.

Speaker(s):

- David Chaves, Securities Fraud Program Manager, Federal Bureau of Investigation

THE NEW IRC CREDENTIAL – WHAT IS IT, AND WHY GET IT

9:15 – 10:15 AM; Room: Grand Hall A

You may have heard already about the new NIRI Investor Relations Charter (IRC™), but not know exactly what is it about, and why you should participate. Why did NIRI create this program, and how does it benefit not just IR professionals, but also the IR profession? Participate in this primarily round table-structured session to learn more about the certification exam and have your questions answered by the IRC volunteer leadership. You can also learn first-hand from members of the inaugural class of IRC charter holders on how they prepared for the certification exam, the challenges they faced, and what the charter distinction means to them.

Learning Objectives

› Understand what the Investor Relations Charter (IRC™) credential is and why NIRI developed it
› Learn about the benefits of earning the IRC certification
› Talk with members of the inaugural IRC class and several of the subject matter experts that created the program about how to prepare for the exam

CONTINUED >

WEDNESDAY, JUNE 8

Speaker(s):

- Matt Brusch, CAE, Vice President, Communications and Practice Information, National Investor Relations Institute (Moderator)
- Bob Burton, Managing Director, Financial Communications, Lambert, Edwards & Associates, Inc.
- Maureen Wolff, President and Partner, Sharon Merrill Associates, Inc.

BIG DATA ANALYTICS IN IR: LATEST ACADEMIC RESEARCH AND ITS IMPLICATIONS FOR IROs

9:15 – 10:15 AM; Room: Grand Hall B

Big data analytics is on every company's agenda. Yet it often remains unclear what big data exactly is, what its relevant implications are for IR and how it can provide benefits within organizations. Big data analytics enables companies to analyze large-scale datasets to reveal novel insights. Applied to the analysis of financial disclosures, big data analytics provides insights into how investors form decisions based on the language in corporate disclosures. The workshop will be structured in three sections:

1) Recent development of big data analytics in IR

2) Lessons learned from big data analytics research in financial markets

3) Implications of big data analytics for IR

Learning Objectives

› Gain understanding of what big data analytics is, how it evolved and what its impact is on the financial industry
› Review the latest approaches and methodologies for IR
› Learn how to exploit big data analytics for applications in IR

Speaker(s):

- Simon Alfano, Co-Founder, TonalityTech GmbH, and Finance Research Group, University of Freiburg, Germany
- Joscha Märkle-Huss, Co-Founder, TonalityTech GmbH, and Finance Research Group, University of Freiburg, Germany

DON'T LET EARNINGS SEASON CATCH YOU BY SURPRISE: AN EARNINGS WARNING

9:15 – 11:15 AM; Room: Grand Hall C

It's only a matter of time before most companies finds themselves in a situation where their financial results are outside the range of analyst consensus estimates – either on the upside or the downside. Whether or not a company gives guidance, IROs will be asked to make tough decisions in the event of an "earnings surprise." Should you preannounce full results? Partial results? Host a conference call? How do you handle analyst and investor questions, and manage the process with the Board and senior management team? This interactive workshop will help IR practitioners make quick, informed decisions on a host of scenarios, and learn from seasoned experts and their colleagues about the pros and cons of different approaches. With unexpected twists and turns, this simulation will be fun, interactive, and surprising!

Learning Objectives

› Learn to carefully consider the pros and cons of pre-announcing earnings results, including considerations such as what information to include, and when and how to issue an earnings warning.
› Learn best practices for working with sell-side analysts to review their models and manage expectations
› Build a valuable network working closely with fellow IROs to share personal experiences around the legal and communications implications of each decision they make throughout the exercise

Speaker(s):

- Andi Rose, Partner, Joele Frank (Moderator)
- Ed Batts, Partner, Orrick
- Steve West, Vice President, Investor Relations, Panera Bread Co.
- Andrew Siegel, Partner, Joele Frank

WEDNESDAY, JUNE 8

DEFANGING DIFFICULT CONVERSATIONS

9:15 – 11:15 AM; Room: Grand Hall D

IROs are routinely involved in challenging interactions—from communicating with investors/analysts about a disappointing quarter to dealing with C-Suite executives who may be off-message about the company's prospects. This highly interactive workshop will help you navigate tough conversations with greater confidence, skill and tact. It will provide proven, practical tools to apply immediately on and off the job, drawing upon current research in the areas of negotiation, emotional intelligence, neuroscience, and the key competencies of top performers.

Learning Objectives

› Learn the underlying structure of a difficult conversation
› Learn how emotional intelligence impacts your success in a challenging interaction and master the rules (and language) of responding and learn the power of letting others talk
› Learn the latest techniques from neuroscience for managing strong emotions and how to take tough stands effectively and with humility

Speaker(s):

- Anna Marie Dunlap, Executive Coach, Kohler & Co.

ICON LEGEND

These icons identify the 10 IRC™ domains in the NIRI Body of Knowledge reference book and are included in conference session descriptions.

- IR Strategy Formulation
- IR Planning Implementation and Measurement
- Messaging Development
- Marketing and Outreach
- Financial Reporting and Analysis
- Business Insight
- Strategic Counsel and Collaboration
- Capital Markets and Capital Structure
- Regulatory Compliance
- Corporate Governance

irc INVESTOR RELATIONS CHARTER™

NIRI CONGRATULATES
THE INAUGURAL CLASS OF INVESTOR RELATIONS CHARTER™ HOLDERS

Representing the inaugural class of IRC credential holders, NIRI congratulates these IR professionals who successfully completed the first IRC™ examination offered worldwide in March.

Matthew C. Abenante, IRC
Karli S. Anderson, IRC
Darin Arita, IRC
Remy S. Bernarda, IRC
Adam E. Berry, IRC
Clayton W. Bilby, IRC
Robert H. Bradley, IRC
Shea N. Burden, IRC
Robert G. Burrows, IRC
Michael P. Dickerson, IRC
Mark J. Donohue, IRC
Jennifer K. Driscoll, IRC
James W. Duies, IRC
Paul R. Finan, IRC
Gary Flaharty, IRC
Mark G. Furlong, IRC
Lawrence Goldberg, IRC
James M. Grant, IRC
Valerie C. Haertel, IRC
Lynn M. Harrison, IRC
Mitchell J. Haws, IRC
Brandon Hodge, IRC
Cynthia M. Holt, IRC
Charles S. Ives, IRC
Todd R. James, IRC
William I. Kent, IRC
Karla J. Kimrey, IRC
Christina L. Kmetko, IRC
Mark P. Kobal, IRC
Heather A. Kos, IRC
Eric M. Leeds, IRC
Erin Linnihan, IRC
Kathleen D. Marvin, IRC
Julie D. Mathews, IRC
Joseph M. McCreery, IRC
John W. Morgan, IRC
Jack E. Nielsen, IRC
Frank B. O'Neil, IRC
Theodore R. O'Neill, IRC
Jennifer R. Park, IRC
Deborah K. Pawlowski, IRC
Gregory P. Peterson, IRC
Jennifer Rice, IRC
Lisa A. Rose, IRC
David A. Rosenbaum, IRC
Peter A. Schuman, IRC
John E. Shave III, IRC
Brian M. Smith, IRC
Shawn T. Southard, IRC
Michael A. Steele, IRC
Brian D. Sullivan, IRC
Christopher L. Symanoskie, IRC
Kathleen Till Stange, IRC
Julie D. Tracy, IRC
Paul M. Vincent, IRC
Stephanie C. Wakefield, IRC
Joan L. Walter, IRC
Heather J. Wietzel, IRC
Jean M. Young, IRC
Joshua E. Zable, IRC
Jonathan Zax, IRC

HOTEL FLOORPLAN

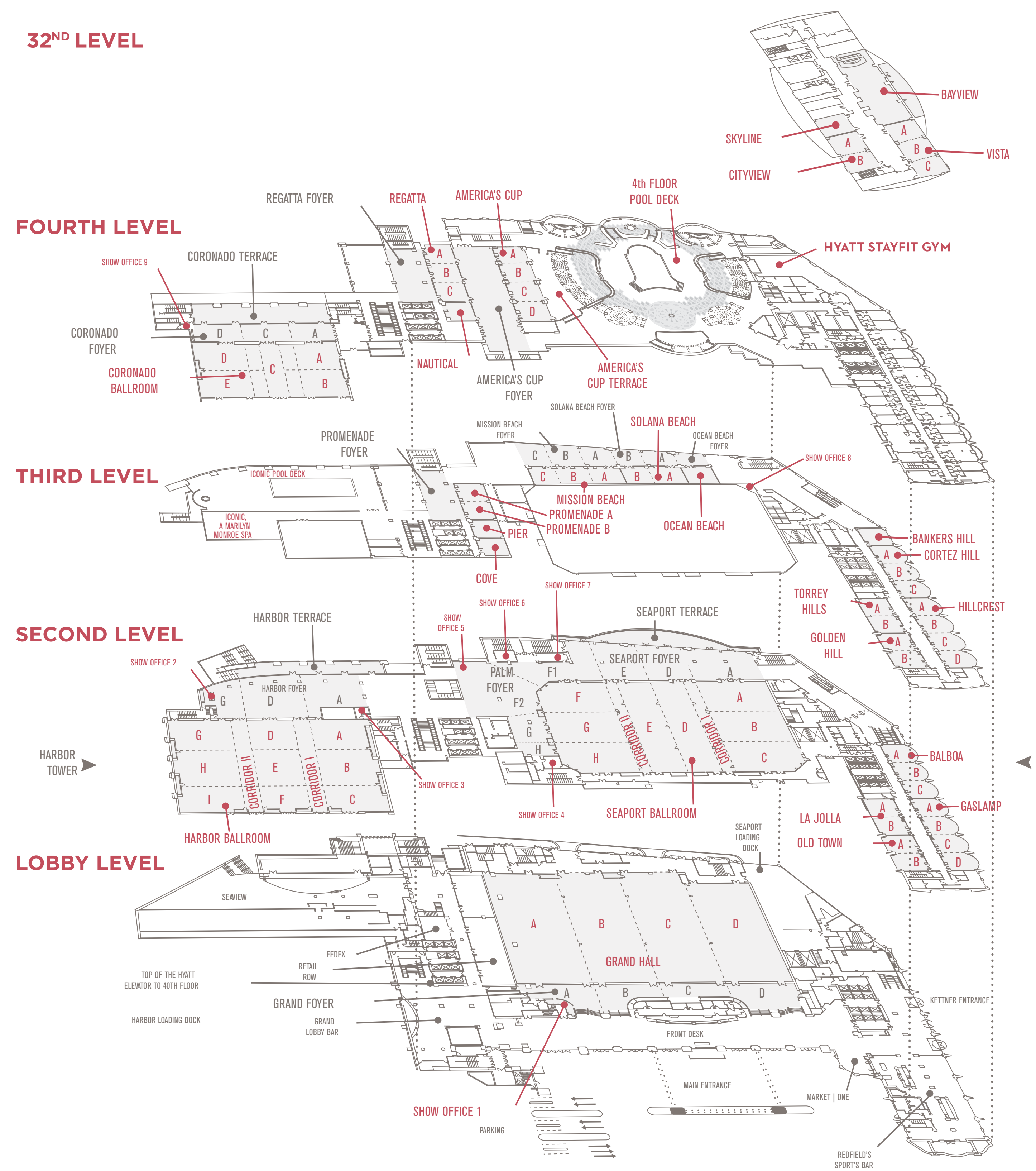
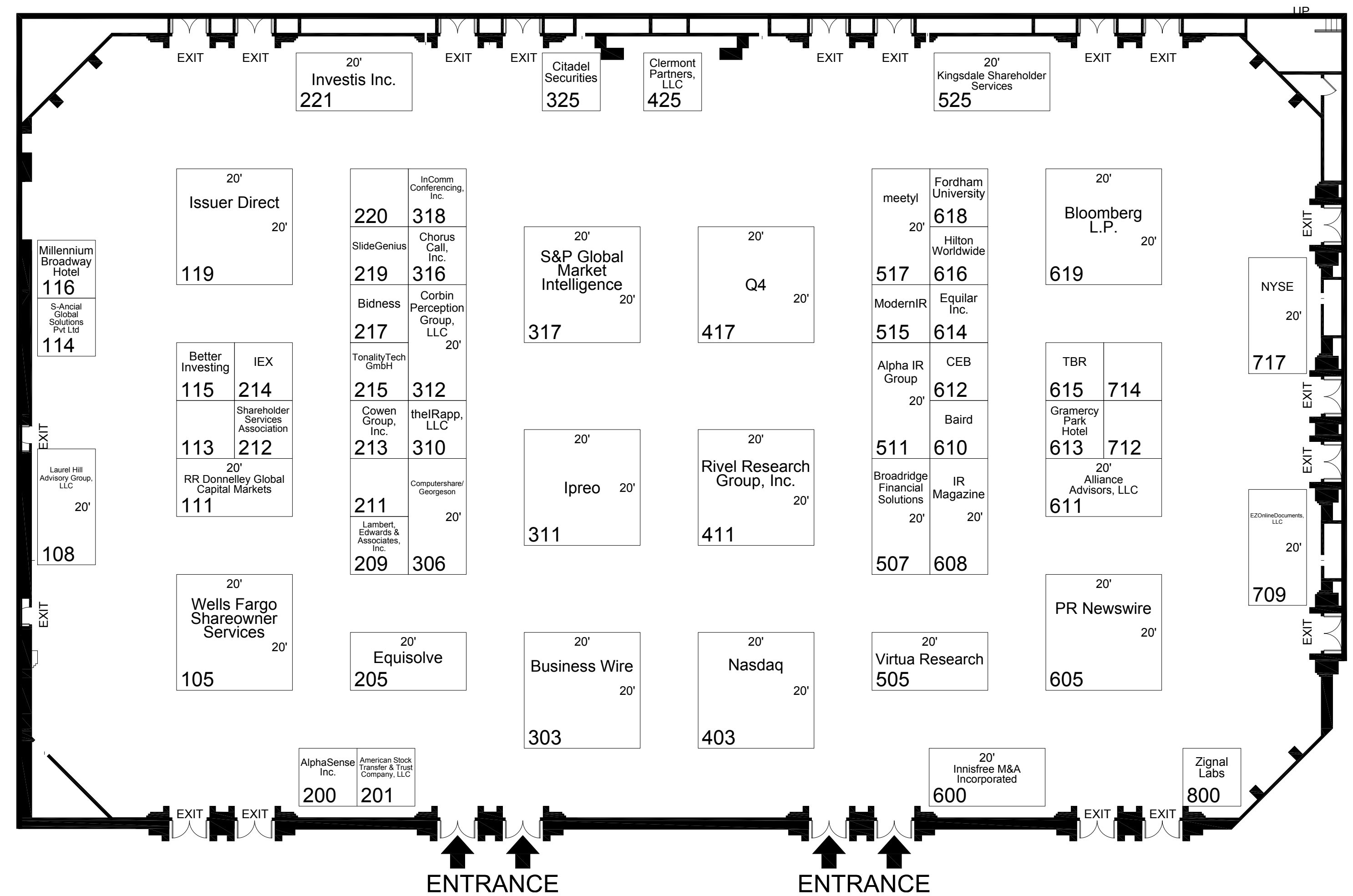


EXHIBIT FLOORPLAN



COME BY THE NIRI BOOTH: PALM FOYER

Visit during Showcase hours to:

- Renew your membership
- Learn more about NIRI Education Programs
- Hear about the Investor Relations Charter
- Meet the NIRI Staff
- Pick up your NIRI Showcase game card

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BetterInvesting/NAIC	Booth: 115
BidnessEtc	Booth: 217
Bloomberg L.P.	Booth: 619
BNY Mellon	Booth: NA
Broadridge Financial Solutions, Inc.	Booth: 507
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CEB	Booth: 612
Chorus Call, Inc.	Booth: 316
Citadel Securities	Booth: 325
Clermont Partners, LLC	Booth: 425
Computershare/Georgeson	Booth: 306
Corbin Perception	Booth: 312
Cowen Group, Inc.	Booth: 213
Equilar Inc.	Booth: 614
Equisolve	Booth: 205
EZOnlineDocuments, LLC	Booth: 709
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Hilton Worldwide	Booth: 616
IEX	Booth: 214
InComm Conferencing, Inc.	Booth: 318
Innisfree M&A Incorporated	Booth: 600
Investis Inc.	Booth: 221
Ipreo	Booth: 311
IR Magazine	Booth: 608
Issuer Direct	Booth: 119
Kingsdale Shareholder Services	Booth: 525
Lambert, Edwards & Associates, Inc.	Booth: 209
Laurel Hill Advisory Group, LLC	Booth: 108
Meetyl	Booth: 517
Millennium Broadway Hotel	Booth: 116
Mizuho Securities USA Inc.	Booth: NA
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NYSE	Booth: 717
PR Newswire	Booth: 605
Q4 Inc.	Booth: 417
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RR Donnelley	Booth: 111
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Shareholder Services Association	Booth: 212
SlideGenius	Booth: 219
TBR Global	Booth: 615
theIRapp, Inc.	Booth: 310
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Zignal Labs	Booth: 800

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Sunday, June 5: 6:00 PM – 8:00 PM
Monday, June 6: 7:30 AM – 4:00 PM
Tuesday, June 7: 7:30 AM – 6:30 PM

And...DON'T FORGET YOUR NIRI SHOWCASE GAME CARD!

EXHIBITOR PROFILES

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Phone: (973) 873-7700 **E-mail:** info@allianceadvisorsllc.com **URL:** www.allianceadvisorsllc.com

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Phone: (312) 445-2870 **E-mail:** info@alpha-ir.com **URL:** www.alpha-ir.com

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Phone: (212) 203-2799 **Email:** jblaine@alpha-sense.com **URL:** www.alpha-sense.com/niri

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Phone: (877) 275-6242 **Email:** kenz@betterinvesting.com **URL:** www.betterinvesting.org

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Phone: 212-651-1564 **Email:** John.Kosakowski@citadelsecurities.com **URL:** www.citadelsecurities.com

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Phone: (312) 588-4992 **Email:** Kerry.Anderson@computershare.com **URL:** www.computershare.com and www.georgeson.com

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Phone: (860) 321-7309 **Email:** Bronwyn.swanson@corbinperception.com **URL:** www.corbinperception.com

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Phone: (646) 562-1000 **Email:** Cowen.US-communications@cowen.com **URL:** www.cowen.com

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Phone: (954) 390-6060 **Email:** help@equisolve.com **URL:** www.equisolve.com

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GRAMERCY PARK HOTEL — BOOTH: 613

Phone: (866) 784-1300 **Email:** info@gramercyparkhotel.com **URL:** www.gramercyparkhotel.com

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HILTON WORLDWIDE — BOOTH: 616

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Phone: (646) 766-9000 **Email:** InvestisUSA@investis.com **URL:** www.investis.com

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BOOTH: 525

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Phone: (516) 933-3100 **Email:** info@laurelhill.com **URL:** www.laurelhill.com

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Phone: (415) 738-4110 **Email:** info@meetyl.com **URL:** meetyl.com

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Phone: (303) 377-2222 **Email:** info@modernir.com **URL:** www.modernir.com

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Contact: Brian Leite, VP - Client Service.

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Phone: (212) 401-8700 **Email:** corporatesolutions@nasdaq.com **URL:** www.business.nasdaq.com/intel/ir-management

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Phone: (703) 562-7700 **Email:** prodev@niri.org **URL:** www.niri.org

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Phone: (416) 626-7829 **Email:**sales@q4inc.com **URL:** www.q4inc.com

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Phone: (212) 896-1255 **Email:** CustomerCare@theIRapp.com **URL:** www.theirapp.com

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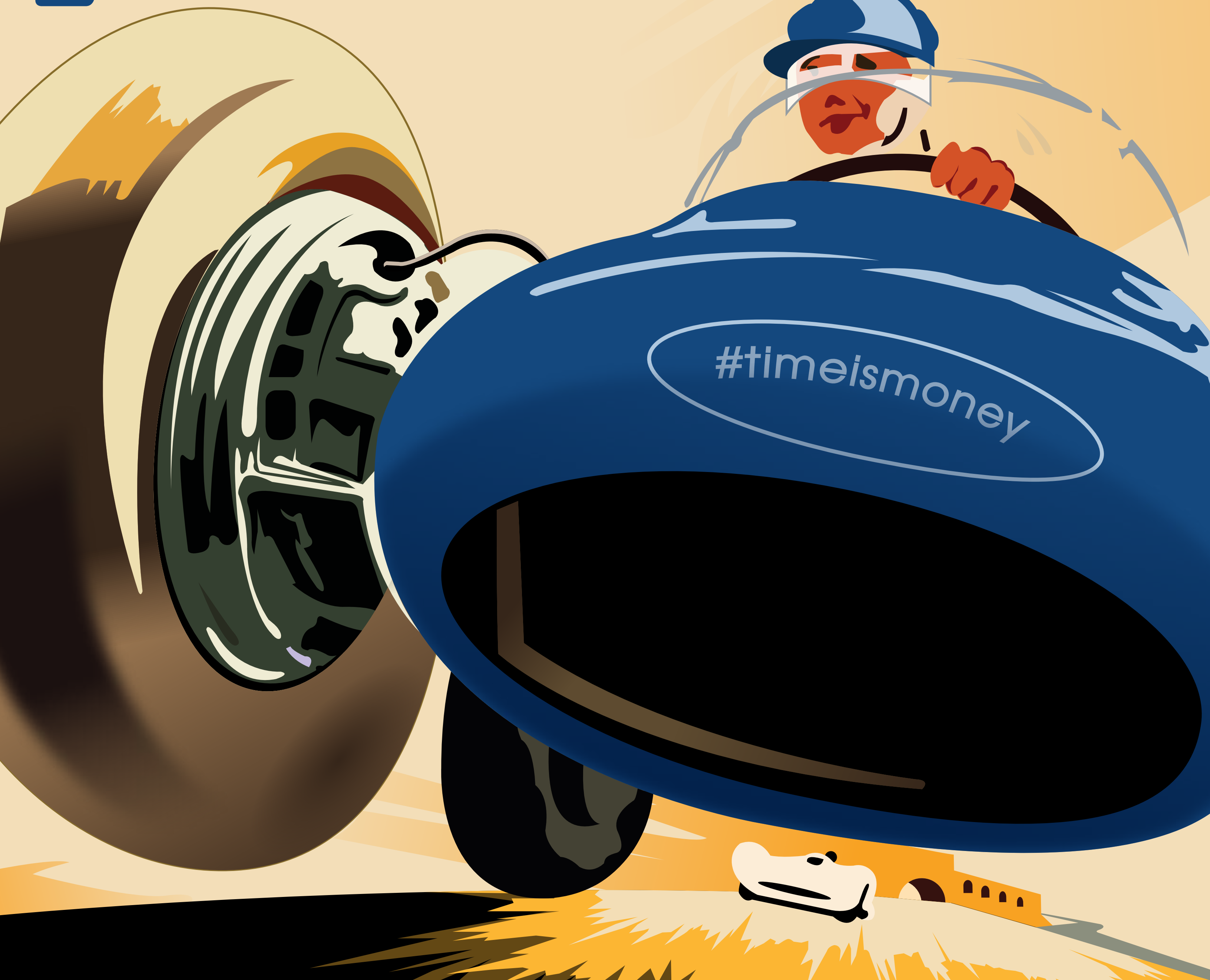

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