

# IR IMPACT THINK TANK WEST COAST

Thursday, March 20, 2025  
San Francisco, CA

## IR IN A YEAR OF CHANGE

As Donald Trump returns to the White House, IR professionals are set for a year of change, with **regulation, capital markets and corporate reporting** all set for a shake up.

To understand the impact on your IR activities and how to plan ahead, join us on March 20 in San Francisco for our think tank, which is **exclusively for senior, in-house IR practitioners**.

The agenda looks at top-of-mind issues for IR professionals, and our **unique format** prioritizes actionable advice, networking and collaboration in a confidential environment.

## AGENDA

All times are in Pacific Time (PT)

8.00 am      **Registration, breakfast and networking**

8.45 am      **Welcome to the IR Think Tank – West Coast 2025**

*Tim Human, events editor, IR Impact*

9.00 am      **Managing your message amid macro uncertainty**

Economic and political uncertainty are high as markets try to piece together how and when the new US administration will implement its campaign promises on tariffs, deregulation and other areas. At this time, telling your story and maintaining the confidence of investors is harder than ever. In this opening session, we unpick the macro picture to hear which policy changes will have the most impact and offer advice on crafting a story that takes into account different outcomes.

- Get expert analysis on the prospects for tariffs and deregulation
- Understand how investors view the US policy agenda
- Hear case studies of how to communicate through trade uncertainty

*Moderator: Tim Human, events editor, IR Impact*

*Daniel Amir, vice president, finance and head of IR, Unity*

*Robert McConnaughey, EVP, head of IR advisory and ESG, Corbin Advisors*

*Chip Newcom, senior director of IR, Equinix*

9.30 am      **Investor targeting: New techniques to enhance results**

While stock markets have rallied strongly in recent years, many companies still struggle to attract attention from new investors. And now, with US policy plans creating uncertainty, the search for your

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next shareholder is even tougher. In this session, we explore innovative ways for companies to boost their appeal and hear case studies from successful targeting programs.

- Hear which targeting tactics lead to the best results
- Get advice on new locations to add to your roadshow schedule
- Identify investors open to your sector, fundamentals, valuation and market cap

*Moderator: Steve Wade, head of content, IR Impact  
Glen Hayashi, partner, US investor relations, SoftBank Group  
David Gennarelli, senior vice president, investor relations, Okta  
Simon Mays-Smith, vice president of IR, Autodesk  
Brad Mills, co-head investor targeting, Citadel Securities*

## 10.10 am **Roundtables – Communicating and attracting investors in the current environment**

Discuss with other senior IROs at your table the ways you are positioning your company and seeking out investors against a backdrop of shifting macro issues.

## 10.40 am **Networking break**

## 11.00 am **AI for IR: Real-world use cases to enhance your IR program**

Where is AI technology really adding value for IR teams? In this session, we hear from IR professionals that are successfully incorporating AI tools into their earnings process, competitive intelligence gathering and other areas of IR practice. They explain which tools they are using, how to get started and the prompts they rely on. The session will also explore the use of automation to free up time for higher-value activities.

- Quickly get started with AI and bag easy wins
- Learn about different tools and where they add most value
- Gain C-suite buy in and overcome security concerns

*Moderator: Steve Wade, head of content, IR Impact  
Christopher Allen, senior director, product marketing, Q4  
Alexandra Chan, senior director, investor relations, Salesforce  
Tony Righetti, vice president of IR, PagerDuty*

## 11.30 am **Roundtables – Learn from your peers about the most effective AI applications for IR**

Share ideas with peers about the best way to get started with AI technology for IR activities and how to overcome any obstacles to implementation.

## 12.00 pm **Is ESG dead? How to talk about sustainability in 2025**

# IR IMPACT THINK TANK WEST COAST

Thursday, March 20, 2025

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The backlash against ESG and sustainability, with a special focus on diversity and inclusion programs, has left many companies wondering how to include environmental and social issues in their equity story. In addition, many find themselves caught between different stakeholders, as US and European investors diverge in their areas of focus. In this session, hear companies explain how they are approaching ESG in the current environment.

- Learn different strategies for managing the debate around ESG
- Respond successfully to criticism focused on diversity programs
- Effectively manage diverse stakeholder views

*Moderator: Tim Human, events editor, IR Impact*

*Friederike Edelmann, vice president, IR and corporate sustainability, Central Garden & Pet*

*Myesha Lacy, chief investor and communications officer, Arcellx*

*Peter Siwinski, partner, FGS Global*

## 12.30 pm **Roundtables – Share strategies on incorporating ESG issues into your overall message**

In this roundtable session, discuss with other IROs what ESG information you are planning to release this year and how you are positioning it as part of your equity story.

## 12.45 pm **Lunch**

## 1.45 pm **Precision IR: Using data to tell a more impactful investment story**

Today, IROs face a rapidly evolving environment: retail investors driving market movements, financial discussions fragmenting across digital networks and stakeholder demands intensifying by the day. The traditional IR playbook isn't enough anymore; ensuring success requires leveraging the right data-driven insights to make sure your financial story reaches, resonates and builds trust with the right audiences. In this session, you'll discover:

- Why enhancing traditional investor relations with data-driven strategies is no longer optional
- Practical steps for using data to optimize your IR communications for today's diverse, digital-first investor base
- How advanced analytics and dashboards can help you work smarter – not harder – and give you time back

*Moderator: Tim Human, events editor, IR Impact*

*Erik Carlson, chief operating officer, Notified*

*Linda Pazin, IR and communications professional*

*Emily Tadano, vice president of IR and ESG, Meritage Homes*

# IR IMPACT THINK TANK WEST COAST

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## 2.15 pm **Best practices for working with the sell side**

The sell side is a critical partner for companies as they communicate and engage with existing and prospective investors. But how can you ensure you are getting the most value from your sell-side relationships? In this session, experienced IROs and members of the sell side offer advice on managing your pool of followers, maximizing management time across different events, working with new analysts and much more.

- Hear advice on balancing time and attention across your analyst following
- Maximize the value from investor conferences and non-deal roadshows
- Effective strategies for attracting new sell-side coverage

*Moderator: Steve Wade, head of content, IR Impact*

*Aron Feingold, vice president, IR and corporate communications, Geron Corporation*

*RJ Pellegrino, managing director, TD Securities*

*Peter Schuman, vice president, investor relations, Adtran Holdings*

## 2.45 pm **Roundtables – Tips for data-driven IR and sell-side engagement**

At your tables, discuss how you use data to enhance your IR efforts and share advice for managing sell-side followers.

## 3.15 pm **Networking break**

## 3.30 pm **Ask-me-anything session with the buy side**

Our ever-popular buy-side Q&A session is back. Put your most pressing questions to our panel of investors – learn how they are positioning themselves for Donald Trump's second term, whether they still care about ESG, the best way to secure a meeting and much more.

- Candid Q&A session with local investors
- Get advice on arranging meetings and providing management access
- Learn red flags that put investors off your story

*Moderator: Steve Wade, head of content, IR Impact*

*Kate Jackson Hobbs, vice president at T Rowe Price*

*Lori Keith, portfolio manager and director of research, Parnassus Investments*

*Tony Kim, managing director, head of fundamental equities global technology, BlackRock*

## 4.00 pm **The IR situation room**

A carefully structured, collaborative session that gives attendees an opportunity to work together to solve each other's real-life IR challenges in a consultation-style setting

# IR IMPACT THINK TANK WEST COAST

Thursday, March 20, 2025  
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- Get real solutions from IR peers on a particular challenge you are facing
- Understand the challenges that other IR professionals are dealing with
- Benefit from the collective discussions that result

*Moderator: Victoria Hyde-Dunn, vice president of IR, Informatica*

4.45 pm **Summary of discussions and end of conference**

*Tim Human, events editor, IR Impact*

5.00 pm **Happy hour drinks reception**