IR IMPACT THINK TANK WEST COAST

Thursday, March 19, 2026
Palo Alto, CA

Leading IR into the future: Prepare for AI, governance and capital markets transformation

Disruptive forces like 24-hour trading, the tokenization of securities, the growing use of AI and information overload are forcing IR leaders to seriously rethink the fundamentals of how they will operate in the capital markets of the future. At the same time, IR teams are under increasing pressure to serve multiple stakeholders, manage an increasingly passive shareholder base and cater to retail investors, all while maintaining transparency, responsiveness and adaptability.

The result? There's an urgent need for IR leaders to strengthen how they anticipate change, communicate to the market and modernize their day-to-day workflows.

The IR Impact Think Tank – West Coast 2026 is an interactive, highly collaborative conference designed for senior IR leaders to address these challenges through hands-on workshops, practical frameworks and peer roundtables. Attendees will leave with clearer communication strategies, smarter AI-enabled workflows and innovative approaches to investor engagement to enable their ongoing strategic impact in 2026.

AGENDA

All times are in Pacific Time (PT). Timings are subject to change.

8.00 am **Registration, breakfast and networking**

8.45 am **Welcome to the IR Impact Think Tank – West Coast 2026**

9.00 am **Leading IR through the unknown**

2025 has brought faster market reactions, rapidly changing information and heightened macro-uncertainty shaping investor behavior. IR teams are tasked with communicating revenue and performance signals with precision while maintaining disclosure guidelines. IROs must balance speed and accuracy in how information is delivered, as emerging developments such as the tokenization of securities introduce further uncertainty around future market impact.

This session explores how leading IR teams are adapting their approach to maintain credibility, manage market volatility effectively and support valuation in an environment where clarity and timing matter more than ever.

- Navigating faster market reactions: explore how IR teams are responding to real-time investor and broker reactions to revenue and performance signals
- Balancing speed with disclosure discipline: discover practical approaches to communicating critical information accurately and in an orderly manner
- Reducing volatility through clarity: understand how consistency, timing and tailored messaging can help stabilize market reaction
- Preparing for the unknown: explore what IR teams should consider today when assessing uncertainty, including the potential impact of 24-hour trading and the tokenization of securities

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9.30 am **Navigating AI in IR: bridging the gap between the buy-side and issuers**

AI is reshaping IR, yet adoption and understanding remain fragmented. While these tools are changing how company information is created and discovered, gaps persist between how IR teams deploy AI and how investors actually use it.

This session brings together buy-side and IR perspectives to examine how AI can be applied more effectively across earnings and answer engine optimization (AEO), with a focus on improving credibility, transparency and trust in IR communication.

The discussion will focus on:

- Aligning IR and buy-side expectations: discover how investors are using AI to process company information and how IR practices can better mirror this
- AI in earnings: explore practical use cases that support preparation, clarity and consistency in earnings materials
- Understanding content visibility: understand how IR content is discovered through answer engines and what teams can do to improve AEO performance

10.00 am **Workshop: lessons learned from AI: prompts, tools and case studies**

A peer-led, hands-on discussion that surfaces real-world lessons on IR related prompt design. Discover how to use AI in a way that drives impact for IROs while remaining safe and secure.

10.30 am **Networking break**

11.00 am **Stewardship, governance and proxy voting: what IR needs to know**

As proxy advisors' policies are becoming more bespoke and diverse, through updates to voting guidelines and changes in how governance factors are evaluated and voting expectations continue to evolve, IR leaders are under increased pressure to anticipate outcomes while communicating governance decisions that influence investor confidence and voting results.

With heightened scrutiny around director elections and shareholder rights, IR teams need practical ways to stay ahead of proxy season engagement.

This session focuses on how IR leaders can proactively work with governance colleagues, engage more effectively with investor stewardship teams and translate governance decisions into a clear, investor-aligned narrative that supports long-term valuation and voting outcomes.

The discussion will focus on:

- Anticipating proxy outcomes: learn how to monitor and respond to a more diverse proxy-advisor policy landscape
- Strengthening engagement: explore practical approaches to engage stewardship teams amid shifting priorities and limited access
- From compliance to clarity: discover how to turn governance decisions into messaging that your investors understand and support

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11.30 am **Roundtable: navigating governance risk narratives**

Discuss with fellow IR leaders how to effectively prepare for proxy season, shareholder proposal concerns and engagement with governance teams.

12.00 pm **How is SB 253 reshaping sustainability disclosure and IR strategy?**

How are California climate laws, such as the California Climate Corporate Data Accountability Act (SB 253), changing the way you approach sustainability reporting?

With the reporting window now in effect for SB 253, scope 1 and 2 data is an imminent disclosure challenge for most public companies furthermore companies need to prepare for audit-ready emissions data across scopes 1,2 and 3. Peer comparisons and potential penalties are increasing investor scrutiny, while the absence of a federal SEC rule is forcing IR leaders to reassess ESG expectations and adapt sustainability strategy, data readiness and investor communication.

Senior IR leaders will discuss how evolving regulations are reshaping sustainability strategies and disclosures for investors and key stakeholders.

12.30 pm **Roundtable: communicating sustainability in a changing ESG landscape**

As investor attention to ESG becomes more selective, IR teams face a growing risk: over-emphasizing ESG can dilute the broader narrative and increase exposure to greenwashing concerns, while being overly cautious or under-communicating ESG can lead to greenhushing, raising questions around credibility, transparency, and compliance.

This session provides IR leaders with practical guidance on how to navigate ESG messaging, best practices for sustainability to improve financial performance and disclosure requirements without overwhelming investors. Attendees will leave with clearer frameworks for communicating ESG in a way that supports valuation, credibility and long-term investor confidence.

The discussion will focus on:

- Prioritizing ESG messages: explore how to decide which ESG topics matter most to investors today
- Linking ESG to value: discover how to frame ESG as a driver of strategy, resilience and returns rather than a standalone narrative
- Managing ESG fatigue: learn to reduce repetition and complexity while maintaining transparency
- Balancing narrative and disclosure: Understand meeting regulatory requirements without distracting from the equity story

12.45 pm **Lunch**

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1.45 pm **Targeting active investors in an increasingly passive environment**

As passive ownership rises and the access to decision-makers becomes a fight for attention, IR teams must adapt their strategies for outreach. Effective targeting today depends less on volume and more on understanding influence, investor priorities and market perception.

This session will explore how IR professionals can use perception data, stakeholder analysis to fine-tune their engagement strategies, sharpen messaging and make better use of limited C-suite access.

Some key discussion points from this session may include:

- Understanding your investors' influence: understand where influence sits in a passive-dominated investor ownership base
- Effective communication: learn how to adapt messaging to increase impact when engagement windows are limited
- The power of retail investors: explore how to adapt key messaging to engage with retail investors
- Leadership engagement: understand how to make the most of your C-suite leaders' time with your audience

2.15 pm **Roundtable: prioritizing investor engagement when access is limited**

This session will enable IR leaders to share practical examples of how they manage relationships, messaging and access to management when management are reluctant to dedicate time to. Participants can exchange learnings on how they identify influential stakeholders, tailor messaging and allocate leadership time more strategically.

2.45 pm **Networking break**

3.15 pm **Climbing the C-suite ladder: an open Q&A with IROs that made the jump to the C-suite**

More IROs are moving into the CFO role, bridging their market insight, communication skills and investor perspective into broader financial leadership.

This session explores how IR professionals are making the leap, what skills translate, what gaps to close and how to prepare for the transition. Hear from former IROs who now lead finance teams and understand what it takes to move from IR to the C-suite.

Some key discussion points from this session may include:

- Better game plan, better outcome: learn how capital markets insight, investor messaging and interacting with leadership directly can support your IR strategy
- Understanding the C-suite effectively: gain practical guidance on how to manage relationships with the C-suite, including how to position objectives and goals to meet evolving expectations
- Interactive fishbowl Q&A: attendees will be invited to submit and pool their questions in a fishbowl in advance and on the day, enabling a candid, peer-led discussion focused on how IROs can work in tandem with their leadership teams

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3.45 pm Roundtable: cutting through the noise - the role of IR in an information-heavy market

When the time comes around for investors to speak to companies, or join their earnings call, they already have a pre-conceived idea based on market commentary, alternative data, trading data and sell-side research. Yet, IR faces a critical challenge to ensure that the information the buy side access to look into companies is consistent, reliable and accurate.

This roundtable brings senior IR leaders together to share how they are refining their communication approach to stand out, reduce reliance on external noise and strengthen trust, without increasing the volume of information needed.

This roundtable will feature the following key themes:

- Establishing a trusted IR voice: discover effective ways to position IR as the consistent reference point for investors
- Cutting through the noise: understand how to stand out through concise and quality communications
- Reinforcing trust: explore how the role of IR is essential in preventing misperceptions of the company

4.15 pm Summary of discussions and end of conference

4.30 pm Happy hour drinks reception