

IR Think Tank, brought to you by BofA Securities and IR Impact

Exclusively for senior IR professionals
Wednesday, March 25, 2026
Bank of America offices, New York

UNIQUE FORMAT

The IR Think Tank is exclusively for senior IR professionals at listed companies. Bringing together BofA's Investor Relations Insights Conference and IR Impact's IR Think Tank into one flagship event, it delivers a full day of high-impact discussion and meaningful connection.

Attendance is free, and the format is deliberately different. Sessions combine plenary debates with small, sector-based group discussions, delivering practical takeaways on the issues shaping the IR agenda right now. Built for senior IROs who want insight, perspective and peers they can talk to.

AGENDA

This event is in-person only. All times are in ET (Eastern time)

7.30 am **Registration and networking breakfast**

7.50 am **Welcome remarks**

Jen Fink, head of Americas corporate access, BofA Securities
Steve Wade, head of content, IR Impact

8.00 am **Market update: outlook for 2026 and what it means for IR**

Moderator: Justin Devery, director, research portfolio strategy, BofA Securities
Aditya Bhave, head, U.S. economics research, BofA Securities
Liz Everett Krisberg, head, Bank of America Institute and deputy director of BofA global research, BofA Securities

8.40 am **How AI is reshaping IR and capital markets**

From engagement tracking to sentiment analysis, AI is redefining how IR teams plan, communicate and measure success. This session explores what forward-thinking IR teams can do today to stay competitive.

- Integrate AI into IR workflows while preserving the personal engagement investors value most
- Meet rising expectations for transparency, compliance and investor trust
- Scale personalization and craft data-driven narratives that resonate with diverse investors
- Consider the role that Search Engine Optimization (SEO) and Generative Engine Optimization (GEO) play in maximizing visibility
- Understand how generative AI is transforming earnings calls, investor materials and disclosure

Moderator: Steve Wade, head of content, IR Impact
Erik Carlson, president and CEO, Notified
Carrie Gillard, director, investor relations, Shopify
Bryan Kloster, investor relations manager, AutoNation

9.25 am **Roundtables: real-world AI applications that IR teams are using today**

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This session is all about real examples and honest conversation. Come ready to share what has helped you and leave with ideas you can use right away.

9.50 am **Networking coffee break**

10.05 am **Targeting that works: finding and engaging the right investors in a volatile world**

In today's unpredictable markets, accurate targeting matters more than ever. This session explores practical ways to identify high-value investors and tailor engagement that cuts through the noise and builds trust.

- Use advanced analytics and investor intelligence to sharpen targeting in volatile markets
- Identify investor segments that can withstand market uncertainty
- Strengthen outreach using digital engagement channels that drive meaningful connection
- Tailor engagement strategies for retail and institutional investors
- Measure targeting effectiveness and adapt strategies as markets and investor behavior evolves

Moderator: Laurie Havelock, editor, IR Impact

Lucia Dempsey, head of investor relations, Chesapeake Utilities

Stephanie Wissink, senior vice president and head of investor relations, Walmart

10.30 am **Views from the buy-side: investor expectations for IR and senior management teams**

Hear directly from leading investors on how they assess companies, allocate capital and engage with management teams. This session offers an unfiltered view of what matters most to the buy-side in today's market.

- How investors identify opportunities and what gets a company onto the radar
- How and when investors engage with companies before committing capital
- The impact of macro conditions and sector outlooks on investment decisions
- What truly drives decision-making today, including the evolving role of ESG

Moderator: Paul Van Cura, managing director, equity advisory sales, BofA Securities

Jenny Goldsmith, director of research, Wellington Management

Karl Kroeker, co-founder, Woodline Partners

Griffin Newman, multi-industry portfolio manager, Point72 Asset Management

11.30 am **Roundtables: keeping investor confidence and credibility when the market turns**

When the market shifts investors look for calm clear messages from IR teams. This roundtable will focus on how to keep trust strong when conditions get tough. Examine practical methods to explain what matters most, how to handle hard questions and how to stay credible even when visibility is low.

12.00 pm **Networking buffet lunch**

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12.50 pm **Scene setter. IR's evolving role, playing offense and defense: activism, M&A, governance and special situations**

This presentation will set the scene for the following panel and will showcase research, data findings and relevant statistics regarding activism, M&A and special situations.

Rebecca Corbin, founder and CEO, Corbin Advisors

1.00 pm **IR's evolving role, playing offense and defense: activism, M&A, governance and special situations**

Shareholder activism is on the rise. This session breaks down what activists look for, the early signals to watch and how IR teams can respond with speed and confidence. We'll also look at IR's role in other 'special situations' such as M&A, corporate governance and more.

- How activist strategies have evolved and what modern campaigns look like - including managing multiple activist engagement
- Refreshing your activist defense playbook using scenario planning, market intelligence and 'normal course' investor communications
- Creating strategic alignment across the management, board and other key stakeholders in high-stakes corporate events, such as M&A, from early phases of a deal through to integration and long-term value creation

Moderator: Laurie Havelock, editor, IR Impact

Danielle Collins, head of investor relations, Southwest Airlines

Rebecca Corbin, founder and CEO, Corbin Advisors

Ron Schneider, director of corporate governance services, DFIN

Deb Wasser, vice president of investor relations, Etsy

1.40 pm **Roundtables: building your activist defense playbook**

Have in-depth and frank conversations with your peers about how to ensure you are properly prepared before an activist shows up. Discuss what to watch for, how to get organised and how to keep control of your story when the pressure rises.

2.10 pm **Networking coffee break**

2.30 pm **Elevating IR inside the C-suite and the board: advice from an award-winning panel**

IR is a strategic function that influences decisions at the highest level. This session explores how IROs can strengthen their voice and position IR as a trusted partner to senior leadership and the board.

- Position IR as a strategic partner influencing corporate direction and boardroom decisions
- Build credibility with the C-suite during periods of volatility and heightened scrutiny
- Align IR objectives with long-term business strategy and governance priorities
- Present investor feedback and market intelligence in ways that drive executive action
- Expand IR's influence as the connective hub between investors, management and the board

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- Explore the various networking events, opportunities and resources available for IR professionals to enhance career progression

Steve Wade, head of content, IR Impact

Rebecca Gardy, senior vice president and chief investor relations officer (retired), Campbell's

Chandni Luthra, executive vice president, global head of financial planning & analysis and investor relations, CBRE

3.00 pm Roundtables: measuring what matters and proving the impact of your IR program

A practical conversation about how IR teams show the real value of their work. Look at how to choose the metrics that matter most, how to track progress in a way leadership understands and how to tell a clear story about the impact of your IR program.

3.30 pm Closing remarks

Steve Wade, head of content, IR Impact

3.40 pm End of think tank

6.00 pm IR Impact Awards – US 2026 at Cipriani 25 Broadway, New York

Please visit www.IR-impact.com/USAwards or contact thomas.williams@ir-impact.com for more information.