

# 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

*Moderator: Steve Wade, head of content, IR Impact  
Willa Mcmanmon, vice president, investor relations, Ingram Micro  
Joe Morford, principal investor relations specialist, Wells Fargo  
Will Zelter, senior director, investor relations, CrowdStrike Holdings*

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## 9.45 am **The intelligence advantage: mastering strategic investor insights with AI**

AI is shifting power dynamic between issuers and the street. While IROs primarily use AI for efficiency gains, the buy side and sell side are strategically leveraging it to inform their research and investment decisions.

This discussion focuses on how IR teams can implement AI in an impactful way by coupling fragmented engagement data with AI to deepen your understanding of investor intent, inform your engagement strategy and move from reactive to proactive targeting.

- Explore how to use AI to synthesize disparate metrics in a way that showcases investor intent
- Discover how investors are using AI in their investment processes
- Understand how to take investor intelligence and apply these insights in your IR strategy to target more effectively
- Hear direct from buy side experts about how they engage with company information so IROs can adapt messaging and content to different investor audiences

*Moderator: Gevitha Anbarasu, events editor, IR Impact*  
*Christopher Allen, vice president, product marketing, Q4*  
*Ryan Fenwick, director, investor relations and strategic finance, Palo Alto Networks*  
*Bryan Kloster, manager of investor relations, AutoNation*

## 10.15 am **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.

## 10.45 am **Networking break**

## 11.00 am **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

The discussion will focus on:

- 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

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

*Robert McConnaughey, executive vice president and head of investor relations advisory and ESG, Corbin Advisors*

*Tony Righetti, senior vice president, investor relations, Five9*

## **11.45 am** 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, bringing their market insight, communication skills and investor perspective into broader financial leadership.

This session will feature Kate Scolnick, former CFO at Owlet Baby Care and HG Insights and now an in-house IRO at Freshworks, alongside James Miln, former IRO and now, CFO at Xometry. Together, they will share their experiences of transitioning from investor relations into senior financial leadership roles, and what that journey really looks like in practice.

The discussion will explore how IR professionals can make the leap, which skills translate most effectively, where gaps may exist and how to prepare for the transition to the C-suite.

The discussion will focus on:

- 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

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

*James Miln, CFO, Xometry*

*Kate Scolnick, vice president, investor relations, Freshworks*

## **12.30 pm** Lunch - in partnership with Citadel Securities

*Brad Mills, co-head investor targeting, Citadel Securities*

## **1.30 pm** Executing a high impact investor day

Investor days present a rare opportunity to reset valuation, strengthen credibility and showcase leadership depth. When done right, with a clear strategy and concrete long-term guidance, an investor day can transform how the market perceives a company's future. In this session, IR leaders will hear directly from seasoned IR professionals on their experience hosting Investor Days and gain insight from a leading research analyst on what makes for a successful event.

The discussion will focus on:

- Rationale for hosting an Investor Day: what key milestones or strategic updates warrant an Investor Day deep-dive
- Optimal timing and frequency: key considerations to evaluate when scheduling your event
- Long-term guidance disclosure: weighing the appropriate timeframe and valuation implications

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- Beyond the deck: bringing your investment narrative to life
- Measuring success: how will analysts and investors assess your Investor Day

*Moderator: Lauren Scott, senior vice president, investor relations and special situations, Edelman Smithfield*

*Aanchal Bindal, partner, senior analyst, Capital Group*

*Aida Orphan, vice president, investor relations, risk management and GSS, Levi Strauss & Co*

*Mark Mahaney, senior managing director and head of internet research, Evercore ISI*

**2.15 pm**

## **Roundtable: 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.

Discuss with fellow IR leaders on how to 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.

**2.45 pm**

## **Maximizing investor attention in a competitive market**

With investor conferences, access is currency – and while corporate access teams sit at the center of allocation decisions, IROs must work in tandem effectively to secure the right investors. With limited investor availability, competing issuer demand and logistical challenges, the current landscape requires IROs to take a more considered approach to conference planning and meeting coordination.

This candid session will unpack how allocation methods work, including what drives a successful investor meeting from the sell side perspective. From communicating target investor lists early, to being transparent about top priorities and availability, we will explore what makes an issuer easier to advocate for – providing a thought-provoking session designed to help IROs rethink their approach.

We will also explore how to work more strategically with the sell side, strengthen relationships year-round and understand what investors value most when balancing packed schedules and competing priorities.

The discussion will focus on:

- Understand how corporate access and allocation frameworks have evolved and what drives prioritization
- Discover how to build stronger, more strategic sell-side partnerships
- Explore what IROs can do differently, from preparation to transparency, to improve investor engagement

Moderator: Steve Wade, head of content, IR Impact

Anil Gupta, vice president, investor relations, Coinbase

Kristina Leo, director, corporate access & advisory, TD Cowen

Edwin Mok, senior vice president, strategic marketing and investor relations, Advanced Energy

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**3.15 pm**      **Networking break**

**3.30 pm**      **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.

Host: Bryan Kloster, manager of investor relations, AutoNation

*\*Attendees are strongly encouraged to bring a laptop to make the most of this session interactive session.*

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

**4.30 pm**      **Happy hour drinks reception - in partnership with NIRI San Francisco Bay Area Chapter**