



THE POWER OF IR

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2019 NIRI ANNUAL CONFERENCE | JUNE 2-5, 2019 | PHOENIX, AZ

THE MUST-ATTEND IR EVENT OF THE YEAR

www.niri.org/conference

GENERAL SESSIONS



DONALD



EDKINS



FRANK



MARTIN-ADAMS



REDFEARN

THE NEXUS OF CAPITAL MARKETS STRUCTURE AND INVESTOR RELATIONS

BRETT REDFEARN

Director, Division of Trading and Markets,
U.S. Securities and Exchange Commission

50 YEARS OF UPS AND DOWNS: THE STATE OF THE STOCK MARKET

LEON COOPERMAN

Chairman & CEO, Omega Family Office, Inc.

BRETT REDFEARN

Director, Division of Trading and Markets,
U.S. Securities and Exchange Commission

JOSEPH SALUZZI

Partner and Co-Founder, Themis Trading LLC

TIM QUAST

President, ModernIR

KEYNOTE ON ARTIFICIAL INTELLIGENCE BY COGNIZANT'S MALCOLM FRANK

MALCOLM FRANK

Executive Vice President, Strategy & Marketing, Cognizant

THE GROWING INFLUENCE OF ARTIFICIAL INTELLIGENCE

EVAN SCHNIDMAN

Founder & CEO, Prattle

JONATHAN NEITZELL

Former Chief Data Officer, FE,
Goldman Sachs Asset Management

SAMUEL LEVENSON

Chief Executive Officer, Arbor Advisory Group

THE FUTURE OF IR - TRUSTED STRATEGIC ADVISOR

LYNN ANTIPAS TYSON

Executive Director, Investor Relations,
Ford Motor Company

SMOOCH REPOVICH REYNOLDS

Managing Partner, Global IRO & CCO
Practice Leader, ZRG Partners

LEE AHLSTROM, IRC

SVP and CFO, RigNet

DOROTHY FLYNN

President, Corporate Issuer Solutions,
Broadridge

THE STOCK MARKET TODAY: BETTER THAN YOU THINK

BOB DICKEY

Managing Director, Technical Strategist,
RBC Wealth Management

CREATING A POSITIVE CORPORATE CULTURE - WHY IT MATTERS TO EMPLOYEES, CUSTOMERS AND INVESTORS

JIM DONALD

Co-Chairman, Albertsons Companies

JOHN HEINBOCKEL

Managing Director, Analyst,
Guggenheim Partners

MICHELLE EDKINS

Managing Director, Global Head of
Investment Stewardship, BlackRock

MELISSA PLAISANCE

Group Vice President, Treasury & IR,
Albertsons Companies

FROM MACRO TO MICRO, WHAT STOCK PRICES TELL US INVESTORS WANT NOW

GINA MARTIN ADAMS, CFA, CMT

Chief Equity Strategist, Bloomberg
Intelligence

OVERCOMING LEADERSHIP STRESS WITH MINDFULNESS

HOLLY DUCKWORTH

Mindful Leadership Guide, Leadership
Solutions International

EDUCATION SESSIONS

IR STRATEGY & PLANNING

- “Get Shorty!”: How IROs Manage Short-Selling to Achieve Fair Valuation
- Starting an IR Program from Scratch
- Hone Your Messaging to Most Effectively Tell Your Company Story
- Uncovering the Value of ESG in Business
- Evolving an IR Program to Include ESG Communications
- Your Crisis Plan is on the Shelf, but Now What?

BUSINESS INSIGHTS & CAPITAL MARKETS

- IRO as CIO (Chief Intelligence Officer) – The Essential Link Between the Street and Senior Management
- Big Data and the Future Value of Sell-Side Research
- You Mean Markets Don’t Always Go Up? – IR Insights and Best Practices for Navigating a Downturn
- On the Stage and Off the Record: Meet the Hedge Funds
- What Every IR Professional Should Know about ETFs – This Era’s Investment Phenomenon

MARKETING OUTREACH & STAKEHOLDER COMMUNICATIONS

- Holding an Investor Day that Transforms Perceptions
- Going on the Road – Best Practices for Investor Conferences and Roadshows
- Coming to America: A Foreign Company’s Guide to the US and Global Markets
- Disclosure: Putting the Pieces of the Puzzle Together
- Click Here: Enhancing Shareholder Engagement with Digital Tools
- Deals – A Multi-Stakeholder View



CORPORATE GOVERNANCE, BOARD RELATIONS, AND STRATEGIC COLLABORATION

- The IRO’s Role and Opportunity with Investor Engagement and Proxy Messaging
- IR Soft Skills for Success – Practical Tools to Increase Your Impact
- The Great Debate: Does Activism Create Shareholder Value?

FINANCIAL REPORTING & REGULATORY COMPLIANCE

- Hot Topics in Financial Reporting
- What’s Next in Washington? A Discussion of Key Regulatory Issues for Public Companies

LUNCH & LEARN SESSIONS

- ESG A to Z - Practical, Relevant Advice for Making Sense of the Madness (*Sponsored by Rivel Research Group*)
- Best Practices for Earnings Press Releases (*Sponsored by Business Wire*)
- Engaging the Buy Side in the Evolving Capital Markets (*Sponsored by Nasdaq*)
- Earnings – The Most POWERFUL (and Frequently Underutilized) Tool in Your Communications Toolbox (*Sponsored by Corbin Advisors*)

SUNDAY SESSIONS

- Executing an Integrated Communications Plan (*Sponsored by Edelman*)
- Goldilocks and the Three Peers: E, S and G: Developing a Strategy That’s ‘Just Right’ for your Company (*Sponsored by Corbin Advisors*)

OTHER

- Industry and Peer Group Breakouts
- Let’s Play Twenty Questions!

AGENDA-AT-A- GLANCE*

SATURDAY, JUNE 1

- 9:00-5:00 PM** Pre-conference seminar: Finance & Capital Markets 101 (separate registration)
- 7:00-9:00 PM** NIRI Volunteer Appreciation Dinner (by invitation)

SUNDAY, JUNE 2

- 9:00-3:00 PM** Pre-conference seminar: Telling a Great Investment Story (separate registration required)
- 1:00-4:00 PM** Sunday Sessions (included in conference registration)
- 4:30-5:00 PM** New to NIRI Conference Orientation Session
- 5:00-6:00 PM** IRC Reception (by invitation)
- 6:00-7:30 PM** Opening Reception in IR Showcase

MONDAY, JUNE 3

- 6:30-7:30 AM** Yoga
- 7:30-5:00 PM** IR Showcase Open
- 7:30-8:30 AM** Breakfast in the IR Showcase
- 8:30-11:30 AM** General Sessions
- 11:30AM-1:30PM** IR Showcase: Exhibits, Express Talks, & Lunch
- 12:00-1:00 PM** Senior Roundtable Lunch (SRT membership required)
- 1:30-2:30 PM** Concurrent Sessions
- 2:30-3:00 PM** Break in the IR Showcase: Exhibits, Express Talks
- 3:00-4:00 PM** Concurrent Sessions
- 4:10-4:50 PM** Industry and Peer Group Breakouts
- 5:00-6:00 PM** The IR Family Feud
- 6:00-7:00 PM** 50th Anniversary Celebration Reception

TUESDAY, JUNE 4

- 6:30-7:30 AM** Fitness Bootcamp
- 7:30-6:30 PM** IR Showcase Open
- 7:30-8:30 AM** Breakfast in the IR Showcase
- 8:30-11:15 AM** General Sessions
- 11:15-12:00 PM** IR Showcase: Exhibits, Express Talks
- 12:00-1:15 PM** Lunch & Learn Sessions
- 1:30-2:30 PM** Concurrent Sessions
- 2:30-3:15 PM** Break in the IR Showcase: Exhibits, Express Talks
- 3:15-5:25 PM** Concurrent Sessions
- 5:30-6:30 PM** Closing Reception in IR Showcase

WEDNESDAY, JUNE 5

- 8:00-8:45 AM** Breakfast
- 8:45-9:45 AM** Concurrent Sessions
- 10:00 AM-12:00 PM** General Sessions



IRC credential holders can earn up to 4 professional development units (PDUs) per day covering all required IR competencies. IRC credentialed volunteers and speakers can also earn PDUs. For more information, visit www.niri.org/certification

* Subject to change. See niri.org/conference for more details.

EXHIBITORS & SPONSORS

AS OF APRIL 25, 2019

NIRI's IR Services Showcase features exhibits from the most respected companies in the industry showcasing the products, services, and solutions to ensure you have the right tools for success.

Alpha IR	Corbin Advisors	Innisfree M&A Incorporated	Rivel Research Group, Inc.
AlphaSense	Clermont Partners	IR Magazine	S&P Global Market Intelligence
Asbury Investor Relations	Donnelley Financial Solutions	Issuer Direct	Say
annoData	Edelman	Litchfield Hills Research	Sentio
AST	EQ	Laurel Hill Advisory Group, LLC	Stock Wave
Baird	EQS Group	ModernIR	Toppan Merrill
Bloomberg L.P.	Gladstone Place Partners	Morrow Sodali	UBS Evidence Lab
Broadridge Financial Solutions, Inc.	Glass Lewis	MZ Group	Virtua Research
Business Wire	IHS Markit	Nasdaq	WeConvene
Chorus Call, Inc.	InComm Conferencing, Inc.	NYSE	West Corporation
Computershare/Georgeson	Investis Digital	Q4 Inc.	



Respect Our Community at #NIRI19

The conference is focused on thought leadership. Only exhibiting companies may engage attendees in the exhibit area. Attendees have been asked not to accept invitations to events from service providers not sponsoring or exhibiting at Conference. Service and product solicitation is not appropriate by any company not sponsoring or exhibiting. Please respect our community and notify NIRI staff of violations.

NETWORKING & NEW EXPERIENCES

In addition to dozens of educational sessions, explore new and interactive experiences that will help you connect with your peers and discover solutions.



NIRI CAREER DEVELOPMENT HUB

Leverage this unique opportunity to interact with IR experts in a space designed to facilitate networking and reflection around your career trajectories and pathways to success.



HEADSHOT LOUNGE

In between product demos, workshops, and networking breaks, be sure to stop by the Headshot Lounge to sit for a professional makeup session and a headshot by an expert portrait photographer.



Back by popular demand on the General Session stage, test your IR knowledge and enjoy watching your peers compete in the IR Family Feud.



Intimate. Bold. Brilliant. These concise presentations by industry experts are held in the IR Showcase during exhibition hours.



SILENT AUCTION

Look for an exciting array of items to bid on at #NIRI19. 100% of the net proceeds from the NIRI Silent Auction will benefit UMOM, a local charitable organization who provides shelter, housing and services for people experiencing homelessness.



50TH ANNIVERSARY CELEBRATION

#NIRI19 is also the official 50th Anniversary Celebration of NIRI, marking the rich history and positive evolution of the organization. NIRI will celebrate with a variety of unique and memorable events and activities including a tribute video and a special reception on Monday, June 3.

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REGISTRATION AND HOUSING

FEES

MEMBER PRACTITIONER	\$1,595
MEMBER SERVICE PROVIDER	\$2,295
NON-MEMBER PRACTITIONER	\$2,295
NON-MEMBER SERVICE PROVIDER	\$2,995
GLOBAL SUBSCRIBER	\$1,945
NIRI SENIOR ROUNDTABLE	\$1,395

The conference takes place at the JW Marriott Desert Ridge Resort and Spa in Phoenix, AZ. This award-winning AAA 4-Diamond property will host all conference sessions and events. Discounted NIRI rates are available to registered attendees and exhibitors only. Be sure to reserve your room by May 15 for special NIRI discounted rates. We appreciate your support of the IR Community by staying at this property and booking through NIRI. For more information on hotel and travel visit www.niri.org/conference.



STAY CONNECTED

- Enjoy free Wi-fi availability in conference session rooms
- Use the NIRI Events app to view session material, participate in polling, and more *sponsored by Nasdaq*
- Stay in touch with Conference attendees through Twitter at #NIRI19

2019 ANNUAL CONFERENCE COMMITTEE



CONFERENCE CHAIR

MIKE CONWAY

The Sherwin Williams Company

VICE CHAIRS

REMY BERNARDA, IRC

Sage IR

TIM QUAST

ModernIR

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RON PARHAM

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Harsco Corporation

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ONEOK, Inc.

BRIAN RIVEL

Rivel Research Group

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DAVID ROSENBAUM, IRC

Brighthouse Financial

ZACH ROTHBERG

AlphaSense

AMY WAKEHAM

ResMed

JIM ZEUMER

PulteGroup

REGISTRATION AND ADMINISTRATIVE POLICIES

NIRI membership is in the name of the individual, not the employer organization; member rates for events and other benefits apply only to the individual member, not all members of an organization. Registrations are nontransferable between events. Badge sharing or splitting is strictly prohibited.

Registrations will be reviewed to ensure compliance with qualifications related to the registration fee categories. Registrations may be cancelled with full refund should the registration not comply. In such cases, registrants will retain the opportunity to register at the correct fee level.

All cancellation and refund requests must be submitted in writing via email to ProfessionalDevelopment@niri.org. Cancellation requests received up to one month before the event (on or before May 2, 2019) will be refunded in full, less a \$150 processing fee. No refunds will be given for cancellation requests received within 30 days of the event (on or after May 3, 2019), including no-shows. All refunds will be processed within one month of confirmation and in the same manner as original payment.

Substitutions requests must be made in writing and will be accepted up to one week before the event. Please note that additional registration fees may apply to a substitute in a different registration category.

Registration and attendance at NIRI meetings and other activities constitutes an agreement by the registrant to NIRI's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, video recordings and electronic reproductions of such events and activities by NIRI.

If you have any questions or concerns, please contact the Professional Development team at ProfessionalDevelopment@niri.org or +1 703-562-7700.