

Strategic IR for

# Transformational Times

The NIRI-Chicago Investor Relations Workshop

September 28, 2018

- 8 a.m. - 8:45 a.m. Registration/Exhibitor Showcase (Oak Room)**
- 8:45 a.m. - 9 a.m. Welcome & Opening Remarks (Oak Room)**  
**Gary A. LaBranche**, FASAE, CAE, President & CEO, NIRI
- 9 a.m. - 10 a.m. Breakfast Keynote: On Point with Point72 (Oak Room)**  
Perry Boyle, Jr., head of equities at Point72, will share his perspectives with Chris Stent, founder, Mission Street Capital Advisors, LLC and McDonald's former vice president of investor relations, on the factors driving change on Wall Street and the implications for investors and investor relations alike. *IRC Domain 8: Capital Markets & Capital Structure*
- Perry Boyle, Jr.**, Head of Equities, Point72
- Moderator: Chris Stent**, Founder, Mission Street Capital Advisors, LLC
- Breakfast Sponsored by NYSE**
- 10 a.m. - 10:30 a.m. Break/Exhibitor Showcase (Oak Room)**  
Meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.
- 10:30 a.m. - 11:30 a.m. All's (Not) Quiet on the Governance Front (Michigan Room)**  
Don't be passive about passive investors. Their voices and influence are growing. Even activists consider the positions and perspectives of the index and quant funds in their strategies – and so should you. Our in-depth discussion will help you serve as an advisor to the C-suite and board on shareholder and director engagement strategies, proxy solicitation and hot-button governance issues, such as executive compensation, board diversity and proxy access. *IRC Domain 7: Strategic Counsel and Collaboration and Domain 10: Corporate Governance*
- Panelists:**  
**Shep Dunlap**, Vice President, Investor Relations, Mondelēz International  
**Christina Maguire**, Managing Director, Proxy Voting and Governance Research, BNY Mellon  
**Kern McPherson**, Senior Director, North American Research, Glass Lewis
- Moderator: Jane McCahon**, Senior Vice President - Corporate Relations and Corporate Secretary, Telephone & Data Systems
- 11:30 a.m. - 1 p.m. Luncheon Keynote - New Media Disruption (Oak Room)**  
Markets move on media news – even as the media feeds on the continuous stream of market news. How do you sort all this out and deliver your message simultaneously to multiple audiences ... each with different agendas ... while staying true to your company's story? Betty Liu, former Bloomberg TV anchor and now executive vice chairman of NYSE, will provide insight on the ever-changing media environment, why it's critical for public companies to communicate more dynamically, and what it means for market trading and stock valuations. *IRC Domain 3: Corporate Messaging Development and Domain 4: Marketing and Outreach*
- Betty Liu**, Executive Vice Chairman, NYSE, Founder and CEO, Radiate
- Moderator: Jon Harris**, Senior Vice President and Chief Communications Officer, Conagra Brands
- Luncheon Sponsored by Zacks IR Tools**

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- 1 p.m. - 1:30 p.m. Dessert/Exhibitor Showcase (Oak Room)**  
Meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.
- 1:30 p.m. - 2:30 p.m. Technology: The New Industrial Revolution (Michigan Room)**  
Technology has benefited investors by reducing costs, speeding trade execution, and enhancing liquidity. But, what has it done for the IRO? Today, technology helps IROs communicate more effectively and save time – and may help us potentially predict events before they arise. How should you arm yourself to take advantage of the ongoing digital change, while also being prepared to respond to investor concerns about new issues, such as cybersecurity? In this session, we'll explore the benefits and shortcomings brought about by today's technology. *IRC Domain 2: IR Planning, Implementation and Measurement, Domain 6: Business Insight and Domain 8: Capital Markets & Capital Structure*
- Panelists:**  
**Adam Frederick**, SVP of Intelligence, Q4 Inc.  
**Aaron Hoffman**, Vice President, Investor Relations, TransUnion  
**Andrew Liuzzi**, Executive Vice President, Crisis and Risk Management, Edelman
- Moderator: Darrell Heaps**, CEO & Founder, Q4 Inc.
- 2:30 p.m. - 3:30 p.m. The Changing Kaleidoscope of ESG Investing (Michigan Room)**  
Environmental, social and governance (ESG) factors are increasingly being integrated into mainstream investors' decision-making processes as a way to improve long-term investment returns and reduce portfolio risk. This is different from the approach traditionally used by socially responsible investors who negatively screen for certain companies or industries based on investors' values. How are investors deciding what ESG information is relevant, and where are they getting that information? Learn about the growing importance of connecting ESG factors to financial performance and take charge of how your company is portrayed by ESG ratings, rankings and experts. *IRC Domain 1: IR Strategy Formulation, Domain 3: Corporate Messaging Development and Domain 5: Corporate Financial Reporting and Analysis*
- Panelists:**  
**Eric Fernald**, Director of Issuer Relations, Sustainalytics  
**Jenny McColloch**, Senior Director, Global Sustainability Strategy and Scale for Good, McDonald's Corporation  
**Dan Nielsen**, Managing Director, Great Lakes Advisors
- Moderator: Victoria Sivrais**, Founding Partner, Clermont Partners
- 3:30 p.m. - 3:45 p.m. Closing Remarks**
- 3:45 p.m. - 5:30 p.m. Networking Reception and Prize Drawing (Oak Room)**  
End the day with a beverage, appetizers and conversation with your fellow workshop participants. Don't miss our prize giveaways.

**Networking reception sponsored by UBS**