



Inaugural Northeast Regional Conference | March 24, 2026

Jay Suites Conferences – Bryant Park | 109 W 39th St (6th Avenue & Broadway), New York City

PARIS CONFERENCE ROOM

TIME	SESSION
11:00 – 11:05 AM	Opening Remarks
11:05 – 11:50 AM	Maximizing IR's Strategic Impact: From Function to Force-Multiplier Francesca DeMartino, Pfizer <i>Chief Investor Relations Officer</i> James Marsh, Peloton <i>SVP of Investor Relations</i> Chris Anselmo, NASDAQ IR Intelligence <i>Managing Director, Investor Relations Intelligence, Moderator</i>
BREAK / LUNCH PICKUP — 11:50 – 12:00 PM	
12:00 – 1:00 PM	KEYNOTE LUNCH PANEL: The Frictionless IRO: From Manual Research to Strategic AI Intelligence Arianna Longinotti Buitoni, Colgate-Palmolive <i>Financial Analyst, Investor Relations</i> Fernando Mariosa, Reddit <i>Investor Relations Manager</i> George Gosden, AlphaSense <i>Account Executive, Moderator</i>
1:10 – 1:55 PM	IROs' Use of Technology in an AI-Influenced World Valerie Haertel, Onity Group <i>Vice President, Investor Relations</i> Laura Kiernan, Clear Channel Outdoor <i>Vice President, Investor Relations</i> Naya Bermudez, Alexandria Technology <i>Director, Investor Relations Products</i> Marc Silverberg, ICR <i>Managing Partner, Global Head of Energy, Clean Tech & Industrials</i> Ron Schneider, Donnelley Financial Solutions (DFIN) <i>Director, Corporate Governance Services, Moderator</i>
2:00 – 2:45 PM	Preparing for Market Shifts: How Forward-Looking IR Teams Stay One Step Ahead Darrell Heaps, Q4 <i>Founder, Chairman and Chief Strategy Officer</i>
COFFEE BREAK / NETWORKING — 2:45 – 3:00 PM	
3:00 – 3:45 PM	What Good Investor Access Looks Like in 2026 Lisa Rubinger, Ashler Capital <i>Head of Corporate Relations</i> Christopher Melito, ICR <i>Head of Investor Access</i> Alexandra Deignan, Lazard <i>Head of Global Treasury & Investor Relations</i> Mark Fasken, Factset Irwin <i>SVP & Co-Head, Moderator</i>
COFFEE BREAK / NETWORKING — 3:45 – 4:00 PM	
4:00 – 4:45 PM	Defending Valuation Now: What Leading IR Teams Do Differently <i>*Interactive Session*</i> Mark Hayes, Breakwater Capital Markets <i>Partner and Head</i>
4:45 – 5:00 PM	Concluding Remarks

COCKTAILS & NETWORKING @ The Cornell Club | 5:15 – 7:00 PM - Sponsored by OpenExchange



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Panel/Presentation Descriptions

11:05 – 11:50 AM

NASDAQ: Maximizing IR's Strategic Impact: From Function to Force-Multiplier

Investor Relations is evolving—no longer just a communications role, but a strategic force shaping investor perception, capital access, and executive decision making. In this timely and practical discussion, senior IR leaders will share how the function is expanding its influence amid shifting investor expectations, leaner teams, and rapid technological change.

Drawing on insights from Nasdaq's 7th Annual Global IR Issuer Pulse Report, this panel will explore how leading IR teams are elevating their impact—from sharpening the equity story and intentionally shaping the shareholder base to leveraging AI, measuring ROI, and engaging both institutional and retail investors more effectively. Moderated by Christopher Anselmo of Nasdaq, the discussion features Francesca DeMartino, Chief Investor Relations Officer at Pfizer, and James Marsh, SVP of Investor Relations at Peloton. Attendees will leave with actionable takeaways on how to position IR as a true strategic partner and force multiplier within their organizations

12:00 – 1:00 PM

AlphaSense: KEYNOTE LUNCH PANEL - The Frictionless IRO: From Manual Research to Strategic AI Intelligence

George Gosden, Account Executive at AlphaSense, will be moderating the lunch keynote and will lead a high-impact discussion to explore how AI is transforming the IR workflow from manual task-work into strategic intelligence.

1:10 – 1:55 PM

Donnelley Financial Solutions (DFIN): IROs' Use of Technology in an AI-Influenced World

How is technology helping IRO's "manage the tactical" so they can "focus on the strategic"?

This interactive panel, moderated by Ron Schneider, Director of Corporate Governance at DFIN, is comprised of senior IRO's, a leading consultant and an AI-powered service provider. They will discuss how technology has impacted the profession over the past few decades, where it is now, and how you can make it "work for you". Bring your questions for what promises to be a fast-paced and informative session!

2:00 – 2:45 PM

Q4: Preparing for Market Shifts: How Forward-Looking IR Teams Stay One Step Ahead

What does a results cycle look like when your AI proactively prepares your team for every milestone, from the first narrative draft to the final post-results analysis?

While some IROs are buried in handwritten notes and fragmented data, agents are creating a new standard for the quarter-close.

Join Darrell Heaps, Chairman and Chief Strategy Officer at Q4, for a look at a "day in the life" of a modern IR team powered by agents that proactively handle the heavy lifting so you can focus on the strategy. See what transforms when agentic workflows move from concept to practice, supported by real use cases, prompts, and outcomes.

3:00 – 3:45 PM

Factset Irwin: What Good Investor Access Looks Like in 2026

A conversation on how expectations for investor access are evolving—and what "good" looks like from both issuer and investor perspectives. In 2026, "good" access is no longer about volume. It's about having the right conversations, with the right investors, and being able to explain why they matter.

- How investor expectations for access have evolved and new "rules" for engagement
- Where access breaks down (volume vs value)
- How to evaluate access and what investors actually consider worthwhile engagement
- How IR teams can prioritize access with limited time

4:00 – 4:45 PM

Breakwater Capital Markets: Defending Valuation Now: What Leading IR Teams Do Differently

93% of public companies globally are at risk of a "story quake" — and the smartest IR leaders are already building the early warning system to stop it before valuation cracks. This session, focused on the first global framework related to communication misalignment at scale, will show you how to detect the signals of narrative risk, prevent avoidable damage, and use a comprehensive diagnostic toolkit to enable valuation resilience. Leave with actionable tools, practical frameworks, and a playbook to strengthen your story, reinforce investor confidence, and better protect long-term value.

Register or Login: www.meetmax.com/sched/event_132953/investor_reg_new.html



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