



# New York Minute

December 2020

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## Looking in the rearview mirror

We're now into the final days of 2020. While I imagine most NIRI New York members will be happy to close the door on what has been an extremely challenging year, it is also worth reflecting on some highlights for our NIRI community over the past 12 months.

NIRI is just that – a community. Being the only IR professional in a large company can feel isolating at times, and even more so in the remote working environment. That was one of the major reasons that NIRI was founded over 50 years ago: to create a network of IR professionals. Long before this global pandemic community was at the heart of the NIRI experience.

Even in this remote environment, NIRI NY provided a range of educational and networking opportunities throughout the

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## PARTNER PERSPECTIVE



As companies ramp up to proxy season 2021, company-investor engagement activities are heating up. To help you prepare for investor engagement conversations, Nasdaq is giving you a look at [their findings](#) from interviews with about 30 institutional investors, representing over \$17 trillion

year. Some of these opportunities were already held online like NIRI's eGroups or webinars. Others – like our in-person events and workshops – needed to be moved to a virtual format. I am proud to say that our entire Board and membership rose to the challenge. We seamlessly transitioned our entire suite of programming online and managed to maintain our sense of connection and togetherness through it all.

We kicked the year off with an engaging panel discussion in January 2020, 'Uncovering What Portfolio Managers Want from IROs', which would be our last in-person event for some time. Following the COVID-19 outbreak and the subsequent shutdown of New York City, in April 2020 we hosted our first virtual panel discussion on crisis communications titled 'When the 'You Know What' Hits the Fan' – aptly timed.

With school back in session in September, we began the fall season with a virtual discussion, 'Getting the Most from Virtual Investor Meetings'. Our November program focused on the increased importance of diversity & inclusion and other social issues in ESG reporting, titled, 'The 'S' in ESG Takes a Step Forward'. Panelists discussed how COVID-19 has put a greater focus on social issues, such as human capital management, as companies tackle employee safety and the future of work. We also rolled out our 'coffee break' series, designed to provide an outlet for casual conversation and networking among NIRI NY members.

Our Senior IRO dinner, an invitation-only event for select IROs to share high-level learnings and advice, took place earlier this month. Joan Woodward, President, Travelers Institute and EVP Public Policy, led an informative discussion outlining the challenges and opportunities IROs should be anticipating under the Biden-Harris administration. The conversation ranged from potential business implications to Washington policy challenges.

Under normal circumstances I would also mention NIRI NY's

EUM, to showcase what companies need to know about ESG engagement.

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## **UPCOMING EVENTS**

### **Leveraging the IR Role to Maximize Your Career: A Virtual Conversation**

*Join us for a unique opportunity to examine your own career path and hear from IR leaders and industry experts*

**Tuesday, January 12, 2021**

**5:00 – 6:00 PM ET**

Accomplished executives know that success can emerge from several paths, all of which require gaining a broad range of experience and making the most of a strategic mindset. In this interactive discussion, we'll hear from leaders in their respective fields about how to leverage your role in investor relations to maximize your career path.

Four separate 'talk tracks' – C-Suite, Entrepreneurial, Executive-level IRO, and Board member – ensure that attendees will gain critical insights on each path to the top. We'll have breakout sessions, plenty of time for Q&A, and opportunities for dialogue with your

annual Holiday Party – an event I look forward to every year. We weren't able to catch up with friends and meet new ones at a swanky New York City rooftop restaurant this year, but our NIRI NY Board is planning something that we hope will be just as much fun. We hope you'll join us for our NIRI NY virtual holiday event on February 25, following the craze of year-end earnings. Stay tuned for more details in the coming weeks.

In a year marked by a global pandemic, racial justice protests, and a climate reckoning, it can be hard to feel optimistic when there are still so many challenges ahead. But with all of this unprecedented change—and the looming uncertainty about the depth and duration of the crisis—I also feel hopeful. That's because I've seen time and time again the power of our NIRI members to help each other through these tough times. Whether you are in between jobs or struggling to balance it all, I encourage you to lean on your NIRI friends for support and encouragement.

I'm hopeful for a brighter 2021.

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As always, I would encourage you to stay connected with the NIRI NY chapter by following us on [Twitter](#), [LinkedIn](#), and checking out the latest information on our [website](#).



Warm regards,  
Neil Stewart  
President, NIRI New York Chapter  
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Find us here: [NIRI NY Board](#) and [NextGen Committee](#)

colleagues. Click [here](#) to register.

**NIRI NY Virtual Holiday Event**  
**Thursday, February 25, 2021**  
**5:30pm ET – whenever!**

*Save the date! Additional details to follow.*

[See entire calendar](#)

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## WELCOME NEW

### MEMBERS!

- Jim Ballan, *Burford Capital*
- Jennifer Halchak, *IQVIA*
- Lindsay Mastroianni, *Prudential Financial*
- Meaghan Montegari, *Wells Fargo*



## Update

**NIRI NY NextGen** wishes everyone a safe and restful holiday season. With 2020 coming to a close, NextGen would like to hear from you! As we plan for 2021 and beyond, please email us some of the questions, trends, and growth areas that you'd like to address in the new year. You can email your questions and thoughts to NextGen VP of Comms, Alex Jorgensen at [ajorgensen@prosek.com](mailto:ajorgensen@prosek.com).

Please save the date for NextGen's next virtual event on January 6, 2021: **'From Private to Public: How to Build an IR Function'**. We will hear from IROs of recently listed companies on how they built out the investor relations infrastructure as their companies transitioned from private to public. We'll hear from the IROs of AirBnB, Peloton, Palantir Technologies, and Campbell Soup on how they built out the IR function as their companies transitioned from private to public. You can look forward to a discussion on how to establish quarterly reporting procedures, build a best-in-class investor website, create an effective marketing plan, and more. Register [here!](#)



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