

## NIRI NY 2026 Northeast Regional Conference

- 130+ IR Professionals
- 6 presentations
- Multiple connections

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### NIRI NY Northeast Regional Conference: "Everything We Had Hoped For"

The outcome last week exceeded our expectations, and it was only possible with the support of our members, sister chapters, sponsors, and volunteers. Thank you for being part of it. Read on for a recap, photos, and a link to our feedback survey for those who attended. [READ MORE](#)



### A shout out to our new members!

This month, we welcome 6 new members to our community from a variety of industries. Join us in welcoming our [new members](#) and connect with them at our next event.



### Notified: Your Global Technology Partner for PR & IR

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### Guest Spotlight

[Nils Paellmann](#), award-winning Investor Relations Officer, former Head of IR at T-Mobile US, and member of the 2020 class of NIRI Fellows, reflects on the evolution of the telecom industry and what lies ahead for mobile network operators. He shares how he built a U.S.-based IR practice from the ground up for a foreign private issuer and offers practical advice for professionals new to investor relations. An avid art and photography enthusiast, Nils also reveals his list of must-see museums in New York City; his top recommendation may surprise you, as it's quite off the beaten path. [READ IN FULL.](#)

# Letter from the President



The NIRI NY Northeast Conference was a resounding success, backed by unwavering member and partner support

Dear NIRI NY Members,

Thank you for being part of **NIRI NY's Inaugural Northeast Regional Conference**. We welcomed more than 130 IR professionals with a 90% attendance rate - a strong signal of the energy and commitment across our community.

One theme came through clearly across every session: Investor Relations is evolving into a strategic, intelligence-driven function. NASDAQ's panel explored IR as a force multiplier, AlphaSense and DFIN dug into how AI is transforming day-to-day workflows. Q4 showed what agent-powered IR teams look like in practice. And FactSet Irwin and Breakwater Capital Markets reinforced the shift toward more intentional investor access and proactive narrative management to protect valuation.

I hope you walked away with something you can put to work, whether that's rethinking your AI workflow, sharpening your access strategy, or simply having made a few new connections worth keeping.

## Post-Conference Actions

- [Share Your Feedback](#) - we're already planning what comes next, and your input will shape it. Please take 5 minutes to complete our survey.
- [Download and Post Photos](#) - please tag [NIRI New York](#) in your photos on LinkedIn!
- [Request Copies of Presentations](#) - these were sent by email to attendees last week and are also linked on [page 7](#) in this issue.
- [Stay Connected](#) - this conference is just the beginning. Our year-round programming continues with panels, networking events, and professional development.

## IR Impact US Awards

Last week's celebrations didn't stop at the conference. At the IR Impact US Awards Ceremony, three of our members took home honors across multiple categories. I'm proud to congratulate them for their outstanding work:

- **Deb Wasser, Etsy** - Best IR Website
- **Sara Marx, Etsy** - IR Rising Star
- **Jason McGruder, Newmark** - Best IRO (mid-cap), Best Overall Investor Relations (mid-cap), and Best in Real Estate Sector

I'd also like to recognize the members from shortlisted companies: Blue Owl Capital, Brookfield Asset Management, Citigroup, Colgate-Palmolive, Chesapeake Utilities, Diversified Energy, Duolingo, Immunic, Kyndryl, Moody's, and State Street Corporation. Being nominated reflects the quality of your work and the caliber of your leadership.

## The Global IR Revolution Event

On March 30th, we hosted the Global Investor Relations Revolution panel discussion led by Oscar Yasar. The event, in partnership with Computershare Georgeson, highlighted what the future of global collaboration in IR may look like. [RECAP HERE](#).



## Member Spotlight

This month we welcomed [Shivani Kak, Head of Investor Relations](#) at Moody's, who shared her perspective on what defines strong IR leadership today: building trust through consistency, transparency, and sound strategic judgment. She also highlighted the importance of developing talent and embracing AI as a tool to make IR teams more efficient, forward-looking, and impactful. [READ IN FULL](#).

## Guest Spotlight

[Nils Paellmann](#), award-winning Investor Relations Officer, former Head of IR at T-Mobile US, and member of the 2020 class of NIRI Fellows, reflects on the evolution of the telecom industry and what lies ahead for mobile network operators. He shares how he built a U.S.-based IR practice from the ground up for a foreign private issuer and offers practical advice for professionals new to investor relations. An avid art and photography enthusiast, Nils also reveals his list of must-see museums in New York City; his top recommendation may surprise you, as it's quite off the beaten path. [READ IN FULL](#).

## What's Ahead for NIRI NY

We'll soon be announcing dates of upcoming events, including Senior IR Roundtable, new members breakfast, and virtual events.

We always welcome feedback from you, our valued members, on how to make NIRI NY Minute even more relevant, thought-provoking, and useful. Thank you for your dedicated engagement with NIRI NY. I look forward to seeing many of you at our upcoming events.

A handwritten signature in black ink, appearing to read "Nichole Saland".

Nichole Saland  
President, NIRI New York Chapter  
[president@niriny.org](mailto:president@niriny.org)



# Welcome New Members!



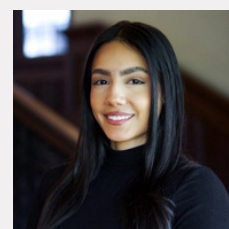
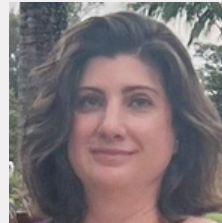
Please join us as we celebrate our new members!

*“New Members: your diverse experience and varied industry expertise are a strong addition to our community. Thank you for choosing the NIRI NY Chapter!”*

**- Nichole Saland, President**

**Sofia Rojas** Senior Associate of IR  
**Matthew Albert** Senior Analyst  
**Stephen Pettibone** Partner  
**Alessandra Vecchi Managing** Director  
**Megan Larsen** Vice President  
**Ryan Flanagan** Managing Director (Technology)  
**Michael Power** Head of Investor Relations  
**Bridget Finnegan** Manager, Investor Relations  
**Madeline Toscano** Manager, Investor Relations  
**Nataly Valadez** Investor Relations Analyst

**Arcellx**  
**Computershare | Georgeson**  
**FGS Global**  
**ICR**  
**ICR**  
**ICR**  
**Iris Energy Limited**  
**Kimco Realty Corporation**  
**Kimco Realty Corporation**  
**Kimco Realty Corporation**



## NEW MEMBERS SNAPSHOT

**10**  
Members

**6**  
Companies

**5**  
Industries

[Chapter Benefits](#)

[Getting Involved](#)



# Member Spotlight



*Drawing on her experience at Moody's, Shivani discusses how trust, consistency, and strategic partnership define exceptional investor relations leadership—while exploring how AI will reshape the future of the profession.*



## Shivani Kak Head of Investor Relations Moody's Corporation

**Q: You've built your career at one of the most respected financial services firms globally. What experiences most shaped your approach to investor relations leadership at Moody's?**

A: To paraphrase Warren Buffett, it's important to take note of the traits you admire in those around you – and utilize those insights to inform your own leadership style. I've benefitted from having access to senior management throughout my career, and value the opportunity to observe how they think and tackle problems – so where possible I do my best to ensure that my team has similar opportunities. Most importantly, I've learnt there's no "one size fits all" approach to leadership. Building trust and empowering my team has been a key component of my leadership style.

**Q: Moody's sits at the center of global capital markets and economic cycles. How do you approach communicating through periods of volatility while maintaining long-term credibility and consistency?**

A: It's very important to parse through all the noise and focus on the fundamentals. Avoid being reactive and instead take a step back and consider the whole picture. Personally, I'm lucky that here at Moody's I have access to the research and insights of my colleagues– and can leverage their expertise when needed. Notably, in many instances, the markets want to hear the puts and takes affecting your guidance. So, be transparent about the headwinds and tailwinds driving guidance. This openness builds trust, and also gives the market the tools to make their own decisions on whether or not they agree with your views on particular trend or sectors.

**Q: In a business where trust is foundational, what does "credibility" mean to you in practical terms as an IRO?**

A: First, it's consistency in messaging – don't contradict yourself or what you said on a prior call or meeting. Investors keep track of your responses, so consistency in messaging is key. Second, if you don't know the answer to a question, just let the investor/analyst know that you'll have to get back to them. Don't try and make something up just to look good in that moment. And, when you have found the answer, providing concrete examples that support your messaging will help build that credibility.

**Q: How do you partner effectively with the CEO, CFO, and broader leadership team to ensure alignment around messaging and investor priorities?**

A: Communication and consistent feedback is key. One thing my team always does before any executive meets with external stakeholders is ensure that they have all the relevant earnings-related materials, and latest Reg FD transcripts. Plus, we set up a prep call to discuss key themes; how we've been speaking about specific topics, as well as any relevant information about the parties that they are meeting with.

And, when we enter our quiet period, we use AI to summarize and analyze key topics both from investors and analysts over that quarter. We also research the metrics and messaging our peers have been using and how the market has responded to their disclosures. All of which positions us well in terms of what incremental messaging we need to consider on upcoming calls.

**Q: In your view, what differentiates strong IR professionals from truly exceptional ones?**

A: Someone who can be the strategic partner to the CFO, providing recommendations and advice on impactful messaging, investor expectations, and market dynamics.

**Q: How do you mentor and develop rising professionals within the IR function?**

A: There are several things one can do, including:

- Ensure they have the right training needed to succeed, whether it relates to financial fluency, capital markets literacy or better understanding the business
- Give them agency, i.e. autonomy over projects that provide them with the opportunity to stretch their knowledge and skills
- Provide timely and specific feedback, both positive and negative
- Encourage them to build relationships across the firm as well as with external stakeholders. And, where needed, facilitate introductions and opportunities to network
- Help them develop strategic judgement – by challenging them to consider what truly matters from an investor perspective
- And, provide them with a safe space to rehearse new ideas and responses before they present either to the C-suite or external stakeholders

**Q: How do you see the investor relations function evolving over the next 3-5 years, particularly in light of AI, digital engagement, and increasing disclosure expectations?**

A: AI will super-charge IR teams' functions – enabling them to not only do more with less, but also be more strategic and predictive in their messaging. Personally, I've already seen this have a positive impact within my own team in enhancing and automating many of our earnings materials and workflows. And, I'm excited to think of the many more ways it will benefit us, whether it's more real-time shareholder analytics, surfacing material signals earlier, or re-imagining how we engage with the market. Who knows, future earnings calls may involve having my Moody's IR Agent rather than CEO/CFO talk to the Agents of our analysts and investors! As for disclosures, I'm certain that there will be greater demand for more clarity around the impact of AI on costs and revenues.

**Q: For young professionals interested in building a long-term career in IR, what skills or experiences should they prioritize early on?**

A: Be intellectually curious and willing to embrace AI and new ways of doing things. The world around us is evolving at an increasingly faster pace, and the ability to adapt and challenge the status quo is at the heart of building a successful career in an AI world.

*Note: The views expressed are solely those of the interviewee and not of the company(s) they represent.*



# Notified

## Empowering IR Teams With Smarter, AI-Driven Insights



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Issue earnings and press releases



Host earnings events



Conduct due diligence and prepare for earnings calls



Monitor whistleblower hotlines



Utilize AI-powered IR assistant to access actionable analytics

And IR Hub is now even smarter with Market Intelligence, Notified's newest investor relations peer and market monitoring feature. Market Intelligence gives IR teams instant access to competitor earnings transcripts, trending topics, sentiment, and analyst insights — all distilled through a secure AI powered assistant. It centralizes research, sharpens messaging, and streamlines executive prep so teams stay ahead with clearer, faster decision ready intelligence.



Read our latest case study: **SOAR Content Framework**



**“Take the ‘Relations’ part of Investor Relations seriously”, says Nils on building credibility and long-lasting relationships**



**Nils Paellmann**  
**Award-winning Investor Relations Officer;**  
**former Head of IR at T-Mobile US; NIRI Fellow**

**Q: You spent more than two decades working in investor relations within the telecommunications sector, including helping shape the investor narrative for Deutsche Telekom and later T-Mobile US. Looking at how the industry has evolved over that time, what is one development you see as a true game changer, and one change you wish hadn't happened?**

**Nils:** From a U.S. perspective, the biggest change has been the consolidation of the industry. When I started in 1998, there were multiple regional wireless players. Now it is down to three national wireless players: T-Mobile, Verizon, and AT&T. Interestingly, in Europe this consolidation hasn't happened to the same extent, primarily due to a very different regulatory environment. This is reflected in returns over time with US telcos generally outperforming their European peers. Can't really think about a change that I wish hadn't happened. Maybe, from an IR perspective, it used to be much easier to reach folks on the phone. Most of that communication has now shifted to email or other digital means.

**Q: Telecom has historically been viewed as a capital-intensive, defensive sector. How do you think investors today evaluate telecom companies differently compared with when you first started in the industry?**

**Nils:** I don't think that has fundamentally changed. It's still defensive which is a good thing especially in a recessionary environment. The mobile phone has become absolutely essential. I have, however, seen a shift in the valuation of T-Mobile. Initially when it was still generating negative free cash flow, it was valued more in line with Nasdaq. Nowadays with the best free cash flow profile of any US telco, it trades more in line with other telcos. Simplistically, when Nasdaq is down, telcos are up and vice versa.

**Q: Looking ahead, what themes or developments do you believe will shape the telecom investment landscape over the next decade?**

**Nils:** Like for many other sectors, AI will become increasingly important. As the world moves toward physical AI, low-latency mobile networks will become increasingly essential. Think autonomous cars for example. The next generation of mobile networks – 6G – will incorporate things like AI RAN. Some of these AI-driven advances are already being incorporated into 5G Advanced. Telcos have historically struggled to benefit from technological innovations with most of the benefits accruing to the big technology companies. But they do provide a key ingredient for technological progress, namely low latency connectivity. I remain hopeful that telcos with T-Mobile at the forefront will be a big beneficiary of AI.

**Q: You opened and led Deutsche Telekom's New York investor relations office starting in 1998. What were the key challenges - and opportunities - of representing a European company to U.S. investors?**

**Nils:** Prior to me opening the New York IR office, Deutsche Telekom's IR had been managed entirely from Bonn, Germany, Deutsche Telekom's headquarters. The CFO at the time wanted an IR presence in New York to better serve Deutsche Telekom's large US investor base. The biggest challenge initially was to establish relationships with key investors and also to convince these investors that I was at least as well informed about the company as my Bonn-based IR colleagues which is always a challenge being in a remote location. I managed to do that by frequent visits to headquarters and a very active IR program including many IR-only roadshows and also a dedicated retail investor outreach.

**Q: What are some of the nuances IROs should understand when managing investor relations for a Foreign Private Issuer listed in the U.S.?**

**Nils:** It's not fundamentally different from doing IR for a US-based company. There are certain practices which are different. For example, it's much less common for European issuers to webcast conference presentations. Also from my experience, European investors and analysts tend to be more focused on the longer-term outlook which US companies are sometimes reluctant to discuss unless there is published long-term guidance. Of note, foreign private issuers are technically not subject to Reg FD although I always tried to keep at least with the spirit of Reg FD.

**Q: You've been deeply involved with NIRI for many years, including serving as President of the NIRI New York Chapter and as a NIRI Fellow. What role has the organization played in shaping the IR profession?**

**Nils:** On a personal level, I am super happy to have been a NIRI member for so many years. IR being a small function, as an IR professional you tend to be somewhat isolated. NIRI is a great way to meet other IR practitioners and learn about IR best practices. In that sense, I would encourage any IR practitioner, especially former sell-side analysts, to become NIRI members and attend local chapter events.

**Q: You are also active as a mentor within the IR community. What advice do you most often give to professionals who are newer to investor relations?**

**Nils:** Besides taking advantage of the resources that NIRI offers, one of my areas of advice is to take the "Relations" part of Investor Relations seriously. To build your credibility both internally and externally, it is so important to form lasting relationships both with investors and analysts as well as internally. Especially if you are based in New York City, make an effort to have in person meetings, including lunches and dinners, regularly with your key investors and analysts. The same applies to key internal contacts, such as public relations, financial reporting, legal, and strategy to mention just a few functions. LinkedIn can also be a helpful tool to develop and deepen those relationships.

**Q: You have a deep passion for art, architecture, and photography. How has that perspective influenced the way you see the world, or your work in investor relations?**

**Nils:** I have always enjoyed taking advantage of roadshows to also see the latest new museum, exhibition, or architecture in roadshow locations, such as Milwaukee, Madison, Chicago, Kansas City, Dallas, Houston, and of course San Francisco and Los Angeles to mention just a few examples. Some of these places you might never visit as a normal tourist.

**Q: If you had to choose one museum, building, or work of art that every IR professional visiting New York should see, what would it be and why?**

**Nils:** Besides the top museums (the Met, Guggenheim, Frick, Whitney, and MoMA) I can highly recommend the Noguchi Museum in Long Island City. Set up by Isamu Noguchi himself, it is an oasis of calm and one of my favorite museums anywhere. Right now they have a great exhibition "Noguchi's New York," focusing on Noguchi's many contributions to New York City (until September 13, 2026). And while you are in Long Island City, make a detour to Roosevelt Island to see the Four Freedoms Park at the southern tip of the island, the only structure designed by Louis Kahn in New York City.

*Note: The views expressed are solely those of the interviewee and not of the company(s) they represent.*



## NIRI NY Northeast Regional Conference - Event Recap



Thank you for joining us at NIRI NY's Inaugural Northeast Regional Conference on Tuesday, March 24th. Having you there made all the difference.

With 136 IR professionals in the room, the energy and quality of conversation exceeded everything we had hoped for. From the opening discussion on IR as a strategic force-multiplier to the interactive closing session on defending valuation, every panel was elevated by the questions you asked and the perspectives you shared.

We hope you walked away with ideas you can put to work, whether that's rethinking your AI workflow, sharpening your investor access strategy, or having made a few new connections worth keeping.

### LINK TO PRESENTATIONS

- 11:05AM - [Nasdaq: Maximizing IR's Strategic Impact: From Function to Force-Multiplier](#)
- 12:00PM - Alphasense - N/A
- 1:10PM - Donnelley Financial Solutions (DFIN) - N/A
- 2:00PM - [Q4: Preparing for Market Shifts: How Forward-Looking IR Teams Stay One Step Ahead](#)
- 3:00PM - Factset Irwin: What Good Investor Access Looks Like in 2026 - N/A
- 4:00PM - [Breakwater Capital Markets: Defending Valuation Now: What Leading IR Teams Do Differently](#)

**Conference photos are linked here**  
**Please tag NIRI New York in your photos on LinkedIn!**

Have an idea for an impactful event?  
Contact [programs@niriny.org](mailto:programs@niriny.org) to suggest a topic or partner with us.



## The Global IR Revolution - Event Recap



On March 30, NIRI New York, in collaboration with Broome Yasar and in partnership with Computershare | Georgeson, hosted The Global Investor Relations Revolution, an engaging discussion on how the IR profession is evolving across markets and mandates.

The panel explored how investor relations has expanded into a more strategic leadership role, the impact of regulatory change, ESG expectations, and activism, how AI and technology are reshaping the IR toolkit, and what the future of global collaboration in IR may look like.

We were honored to welcome an exceptional group of speakers:

Tiffany Willis, Former Head of IR — Starbucks

Carolayne Borders, Chief IR Officer — GE HealthCare

Laura Kiernan, Head of IR — Clear Channel

Aaron Bertinetti, CEO, Investor Engagement (North America) — Computershare

Expertly moderated by Oskar Yasar, Managing Partner at Broome Yasar and author of The Global IR Revolution, the evening offered thoughtful perspectives, practical takeaways, and meaningful dialogue with peers across the IR and capital markets community.

A sincere thank you to our speakers, partners, and everyone who joined us for such a timely and energizing evening in New York

Have an idea for an impactful event?  
Contact [programs@niriny.org](mailto:programs@niriny.org) to suggest a topic or partner with us.



# NextGen Corner



## NIRI NY NextGen's Speed Mentoring event recap *Hosted in partnership with S&P Global*



On March 12th, we partnered with S&P Global for our annual Speed Mentoring event, bringing together NextGen members and seasoned IR professionals for an evening of networking and building new connections.

Thank you to our mentors who volunteered their time:

- **Miranda Velonis, Vice President, Investor Relations at IBM**
- **Adam Reiffe, Vice President, Investor Relations at Becton Dickinson**
- **Lauren Torres, EVP, Special Situations & Investor Relations at Edelman Smithfield**
- **Olga Levinzon, Senior Vice President, Investor Relations and Head of M&A at Coty**
- **J.T. Farley, Director, Investor Relations at Ziff Davis**
- **Hayes Honea, Associate, Investor Relations at VICI Properties**

At NIRI NextGen, there's always more to look forward to...



Company presentations



Speed Mentoring



Discussion Panels

### Join Today!

If you are interested or know someone who could benefit from the NextGen Program, please contact the team at [nirnextgen@niriny.org](mailto:nirnextgen@niriny.org).

### Who should get involved?

- ✓ New professionals exploring a career in IR
- ✓ IR Professionals newer to the workforce
- ✓ Have been in IR for five years or less