

NIRI NY Northeast Regional Conference

March 24, 2026



Jay Bryant Park
109 W 39th St, New York



REGISTER NOW!

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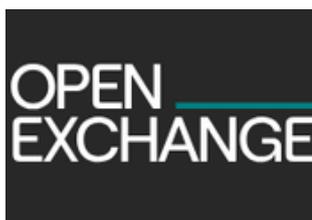
NIRI NY Northeast Regional Conference Agenda is Live - JOIN US!

[View and download the agenda now.](#) We will explore the IRO role at the intersection of innovation, AI, strategy, and market dynamics. This conference will help set the key markers for navigating your 2026 IR program. Register today!. [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.



OpenExchange: Professionally Managed Virtual and Hybrid Meetings

OpenExchange is the trusted virtual and hybrid communications partner to global banks, investors, and public companies. From earnings calls to global town halls, OpenExchange delivers events with seamless execution.



Guest Spotlight

This month we welcomed [Andy Milevoj, SVP of Investor Relations at 1-800-FLOWERS.COM](#), a fitting guest for the Valentine's season. Andy delivered a gift of professional wisdom and a few surprises from the e-commerce gifting world. One of the rare IROs to build and grow his career entirely within Investor Relations, Andy reflects on watching Investor Relations evolve as a profession and on walking a different path from the traditional transition from banking or sell-side roles. An avid reader, he also shares how his earlier experience shaped his love for books. [READ IN FULL](#)

Letter from the President



NIRI NY Northeast Regional Conference: less than 30 days remaining to register, secure your spot today [here!](#)

Dear NIRI NY Members,

I'm excited to share that we're in final stages of preparation for our inaugural [NIRI NY Northeast Regional Conference, themed Navigating Complexities: Redefining Investor Relations in a Complex World](#). It will take place on **March 24th from 11:00am-7:00pm** at Jay Conference Bryant Park, and I hope you will join us.

The [agenda is now live](#), and we encourage all members to [REGISTER HERE](#). From the outset, our goal has been to design a program that moves beyond standard panel discussions to deliver practical, ready-to-apply knowledge.

While the format includes the traditional opening remarks and presentations, the content is laser-focused on the most pressing challenges facing our profession today: AI integration, valuation protection, and the future of investor engagement. Our mandate to all speakers and moderators is simple: intentionality and education over promotion. We want every IRO to leave with a toolkit they can implement immediately.

This event is made possible by the generous support of our partners, whose sponsorship has allowed us to significantly reduce registration fees for both members and non-members. We remain committed to providing a "member-first" experience – independent, practical, and collaborative. Please visit our website or LinkedIn page for final updates, or reach out to us at programs@niriny.org with any questions.

Earnings: From "What" to "How"

U.S. earnings season is drawing to a close for most calendar-year companies, with profits up approximately 12% year-over-year. However, the market's reaction has become increasingly exacting. The defining themes weren't just about the "beat," but about:

- **Tangible AI ROI:** moving past the hype to measurable returns.
- **Guidance Credibility:** Disciplined capital allocation and value catalysts.
- **Transparency:** Companies that provided "transparent bridges" and cash flow visibility were rewarded.

Conversely, the market showed little patience for wide outlook ranges, adjustment-heavy metrics, or "back-half-weighted" narratives. For the IRO, the lesson is clear: consistency and clarity remain the ultimate currency.

Navigating the New Trade Regime

Trade policy has surged back to the forefront. The newly announced 15% global tariff—introduced as a temporary 150-day regime following the Supreme Court's ruling on the IEEPA framework, has re-introduced complex cost and supply-chain questions into the boardroom. For CFOs and IROs, this isn't just a policy shift; it's a disclosure challenge. Investors are looking for:

- **Quantified Exposure:** Clear margin and working capital impacts.
- **Mitigation Strategy:** How the company is pivoting in real-time.
- **The "Refund" Narrative:** Addressing potential recoveries from previously collected IEEPA-based tariffs.

The investment community is less concerned with the policy itself than with the speed and credibility of our response. The role of IROs is to bridge that information gap with precision.



Member Spotlight

[Anna Thomas](#), Director of IR at [KKR & Co.](#) Inc. is our member in the spotlight this month. Anna reflects on her eight-year journey at KKR, sharing how curiosity, adaptability, and proactive leadership fueled her growth from Associate to Director of Investor Relations. Drawing on her investment banking foundation, she discusses the importance of distilling complex stories into compelling equity narratives—particularly within a global, alternative asset manager navigating shifting macro environments. [READ IN FULL](#).

Guest Spotlight

This month we welcomed [Andy Milevoj, SVP of Investor Relations](#) at [1-800-FLOWERS.COM](#), a fitting guest for the Valentine's season. Andy delivered a gift of professional wisdom and a few surprises from the e-commerce gifting world. One of the rare IROs to build and grow his career entirely within Investor Relations, Andy reflects on watching Investor Relations evolve as a profession and on walking a different path from the traditional transition from banking or sell-side roles. [READ IN FULL](#).

What's Ahead for NIRI NY

Join us on Monday, March 30th at 6pm for the reinstated [Global Investor Relations Revolution](#) event, an insightful and dynamic conversation with seasoned IROs led by Oscar Yasar, Author of *The Global Investor Relations Revolution*. Registrations are open [HERE](#). NIRI NY Members should reach out to admin@niriny.org and secure a member registration link or code.

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



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

Aaron Bertinetti CEO, Investor Engagement North America
Joseph DiLandro EVP, Market and Client Development
Sid Brown Business Development Director
Evelyn Infurna Vice President of Investor Relations
Sara Gori EIR
Lauren Puffer Managing Director, M&A

Computershare | Georgeson
Computershare | Georgeson
IDX
Northern Oil & Gas, Inc
R3i ventures
TD Securities



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Member Spotlight

Join Anna as she shares how curiosity, adaptability, and leadership have shaped her Investor Relations journey at KKR.



Anna Thomas Director, Investor Relations KKR & Co. Inc.

Q: You've spent over eight years at KKR, progressing from Associate to Principal to Director. Looking back, what skills or experiences do you think mattered most in enabling that growth within IR?

A: I often use a comparison when I speak to people about what it means to be in Investor Relations. The role brings together all the different classes you would take in college to earn a business major – accounting, corporate finance, strategy, economics, and marketing. I think growing in each of these respective areas, as well as learning the very role specific elements such as legal requirements and utilizing IR tools are table stakes necessary to move beyond the junior level. At the same time, I was fortunate to be included in internal conversations with our C-Suite and in external conversations with investors and the sell side from the beginning, even if at the time I wasn't the one running those interactions. Hearing those conversations and debriefing afterwards with the senior members of the IR team better informed the "why" of the baseline tasks I handled and were fundamental to getting me up the learning curve quickly. I would encourage junior team members to ask to be included in some of these types of conversations to gain exposure sooner than later in their careers. As I continued to grow in the role, I often let one of KKR's core values – stay curious, stay creative – propel me forward. I think this has really resonated when forming investor relationships – what are investors telling you when you really sit back and listen to them? And has resonated with leadership – how can you creatively address these investor questions while building on the foundational tenets of the role and the KKR narrative?

Q: You started your career in investment banking before moving into investor relations. How did that foundation shape your approach to IR, particularly in a complex, global organization like KKR?

A: I was in a syndicated and leveraged finance capital markets seat in investment banking before I joined the KKR IR team and think it provided solid groundwork for many aspects of the IR role. Although in banking I was on a team focused on originating and syndicating debt and in IR I'm focused on the equity story, the core question was still "what would make this interesting to an institutional investor?" I practiced distilling potentially complex stories across many different industries and scenarios into credible selling points. At the same time, investment banking also quickly taught me I need to be agile and adaptable as markets shift. As noted, KKR is a multi-dimensional, global firm and it is sometimes perceived to be more impacted than some companies by macro investment themes, shifts in global markets, or in geopolitics. I've learned you need to keep your messaging consistent with the right level of nuance but also be ready to react as appropriate in these different market backdrops.

Q: KKR recently joined the S&P 500 in June 2024 marking a major milestone. From an IR perspective, what shifts when a firm reaches that level of visibility, and how does the IR function adapt?

A: When any company is added to the S&P 500 it is an important level of legitimization and an exciting moment of memorialization. For KKR specifically it was particularly validating as we were only the second company in the financials sub-industry of alternative asset management to be added. Practically speaking, being added to the most heavily tracked index means you're fishing in a bigger pond. There was the one-time pickup from the funds mimicking the performance of the index, but more importantly there were active managers that simply would not spend time on KKR because we were not in their benchmark. Given KKR's almost 50-year-old brand and track record, as well as its approximately \$85 billion market capitalization at the time, not much shifted at the firm level. But as the possibility of inclusion became more probable, the IR team made sure that our elevator pitch was refined for a more generalist portfolio manager who may be less steeped in the financials sector. We also expanded our "dream shareholder list" to include names in that bigger pond and made a strategic plan for how to ramp up connectivity with them.

Q: Are there any misconceptions about investor relations that you wish more people, either internally or externally, understood better?

A: This is a niche answer, but I always fight the battle of explaining what Investor Relations at KKR means. Given KKR is an alternative asset management firm, there are a couple hundred people at the firm whose job is to interact with KKR's clients who invest in our funds. Naturally, many in the investment industry also call this investor relations. It usually takes a bit of back and forth with someone to explain I cover the public shareholders in KKR's stock and that I cover everything about KKR, not a particular asset class.

Q: What advice would you give to someone looking to move from an execution-focused IR role into a more strategic, leadership-oriented position?

A: I would give two pieces of advice, one more open-ended and one more tangible. First, think about everything you do on the execution front and channel energy into improving those tasks by at least one percent every time you do them without your boss asking. Maybe that's using AI to create efficiencies for a small team, maybe that's looking at other companies' IR websites to get ideas on how to improve yours. Show you're proactive and able to take on more than what's assigned to you on a day-to-day basis. Second, look or ask for stretch opportunities in the big moments. One project that has helped elevate me is my involvement with our investor days. Investor days require working across an even broader swath of the firm than may usually be required. Earning the trust of these key internal stakeholders is critical to transition into a more leadership-oriented position. KKR has historically held investor days every three years, so I've worked on three in my time at the firm. During the second and third of those, I helped connect our Co-CEOs' vision for the day across all elements. Being a central, through line when it came to the generation of slide content for various business leaders, the creation of memorable moments for attendees and problem solving any pain points presented me with many opportunities to stretch beyond pure execution. This resonated with management and the broader swath of internal stakeholders. I have often found I had to prove myself internally first to then be given more stretch opportunities externally.

Q: You're actively involved in the KKR Women ERG and broader community leadership. How has participating in those networks influenced your career and perspective as a leader?

A: My involvement with KKR Women and other forms of community engagement, such as being involved with non-profits and the University I attended, I've initially done because they bring me joy, but they've had unanticipated benefits. Active leadership involvement in these groups has given me a chance to refine skills at a faster rate. Public speaking in front of a larger scale crowd is something I don't often have the opportunity to do as a mid-level IR professional but is an important skill to practice as I look ahead to a potential Head of IR seat one day. I've been able to practice this more routinely in my roles at these other organizations. These groups have also shaped my professional relationships both within KKR and externally. Inside the firm, I've found that showing passion for something beyond the daily job function humanizes you, especially in the eyes of those more junior to you. I think that element has made me a relatable leader. Externally, I continue to be in awe of how small and connected the world is. I've gained senior mentors, broadened my peer network and deepened investor relationships through the connectivity these organizations provide. All the benefits of these expanded relationships are not easily quantified but have undoubtedly added texture to my career.

Q: Lastly, if you could give your younger self one piece of career advice before entering finance, what would it be?

A: I hope and think this advice is applicable even beyond finance! The advice I would give my younger self and continue to remind myself of is "to get comfortable being uncomfortable." **If you're never uncomfortable, you're never growing and expanding your potential.**

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



Professionally Managed Virtual Meetings for High-Stakes Communications



OpenExchange is the virtual and hybrid communications partner chosen by the most demanding industries in the world. We support global banks, public companies, investment managers, and corporate leaders in delivering flawless, high-stakes meetings and events across time zones, platforms, and formats.

From Corporate Access conferences and capital markets meetings to Earnings Calls, Investor Days, LP updates, and global town halls, our team combines expert operators, advanced technology, and meticulous planning to ensure every message is delivered with clarity, confidence, and control. As the preferred professional services partner for Zoom Events, OpenExchange specializes in onboarding, training, and full event management, helping clients elevate everything from analyst calls to company-wide kickoffs.

When communication cannot fail, organizations turn to OpenExchange.

Introducing OE Meet Smarter Scheduling. Seamless Execution.



When demand surges after earnings, acquisitions, FDA approvals, or major announcements, leadership calendars fill instantly. OE Meet is OpenExchange's structured scheduling and callback solution designed to handle high-volume investor and analyst engagement without manual coordination.

OE Meet automates prioritized booking, supports first-come or segmented scheduling, enables multi-day programs under a single link, and allows simultaneous CEO and CFO tracks. Calendar confirmations are generated automatically, eliminating hours of back-and-forth.

For companies not hosting a full Investor Day this year, shorter-form investor update calls are increasingly important. OE Meet makes it easy to extend the impact of earnings and strategic announcements through organized, targeted follow-up meetings. Managed execution is optional. Teams can use OE Meet purely as a powerful scheduling tool, or add white-glove support where OpenExchange operators run meetings, verify participants, keep strict time, handle hard stops, and ensure seamless transitions throughout the day.

OE Meet removes complexity so leadership can focus on the conversation, not the coordination.

“Thank you for the outstanding support you provided in the planning and delivery of the All-Employee Meeting yesterday. Your expertise, engagement, and calm execution ensured every detail was handled with professionalism and care.”

— Niki Tomlinson
Chief of Staff | Industrial Print

Let's Elevate Your Next Investor Communication

If our team is planning an upcoming Earnings Call, Investor Day, Analyst Meeting, or experiencing a surge in investor engagement following a major announcement, OpenExchange is ready to support you.

Visit www.openexc.com to learn more about OE Meet and our full suite of professionally managed virtual event solutions or click the link below to book a call with one of our consultants.

[Book a Call](#)



A Break-up With Romance? 40%+ of Valentine's gifts now go to family, friends, and even pets. Galentine's and self-love are also reshaping the holiday.



Andy Milevoj
SVP of Investor Relations
1-800-FLOWERS.COM

Q: Many people still think of 1-800-FLOWERS.COM as just flowers, but the company is really a family of gifting brands, including Harry & David and Personalization Mall. How does this portfolio strengthen the business and support growth across gifting occasions?

Andy: 1-800-Flowers.com is an iconic company with products customers love. One of our biggest advantages is that we're not a single-brand, single-occasion company. We operate a portfolio of well-known brands across floral, gourmet food, and personalized gifting, which allows us to help customers celebrate a wide range of life's moments, from birthdays and anniversaries to those special "just because" occasions. Our diversified offerings, including flowers, chocolates, berries, cookies, and our hard-to-resist Moose Munch[®] popcorn, allow us to convert single-occasion customers into multi-brand customers.

Q: Valentine's Day is a major driver for the e-commerce gifting industry. What trends stand out in how consumers buy flowers and gifts online?

Andy: Over the years, we've seen a broadening of the holiday to extend beyond a romantic partner. Over 40% of Valentine's gifts now go to family, friends, kids, and even pets. Galentine's Day and self-love celebrations are reshaping the holiday. On trends that stand out, black roses emerged as a Valentine's Day surprise. The trend is driven by younger shoppers who are seeking unique and edgy expressions of love.

Q: Do you see more consolidation ahead in the e-commerce gifting space, and what kinds of business models are most attractive in today's M&A environment?

Andy: The e-commerce gifting industry remains highly fragmented. Historically, we have been an active acquirer, completing both significant transactions, including Harry & David and Personalization Mall, and smaller tuck-in acquisitions. While we are always open to new opportunities, our current focus is on strengthening the core business and building a solid foundation for sustainable revenue and profit growth. To support that, our capital allocation approach is centered on driving operational efficiencies, enhancing the customer experience, and expanding our technology capabilities.

Q: Personalization and convenience continue to shape e-commerce expectations. How is 1-800-Flowers leveraging data, technology, or AI to enhance the customer experience and drive repeat engagement?

Andy: We are in the process of transforming 1-800-Flowers.com into a more customer-centric, data-driven organization. To support this, we're simplifying and modernizing the digital experience, strengthening our data infrastructure, and evolving marketing into a full-funnel engine that balances awareness, acquisition, and retention.

Additionally, we're aligning merchandising around categories and streamlining our brand architecture to deliver a more unified and intuitive experience. We will also use algorithm-driven merchandising to personalize the journey. Collectively, we expect these actions to create a more intuitive, personalized, and connected customer experience.

Q: Flowers are often considered a timeless gift, perfect for any occasion throughout the year. How does 1-800-Flowers leverage this enduring appeal, and are there trends in gifting beyond the traditional holidays that investors typically watch for?

Andy: Gifting is about human connection and expression. It's how people celebrate milestones, show appreciation, or simply let someone know they're thinking of them, and that doesn't just happen around the holidays. A big focus for us is expanding everyday and "just because" occasions, as well as helping customers treat themselves through more self-consumption opportunities. Given our broad family of brands we see opportunities to drive frequency and retention through better marketing and more focused merchandising.

Q: Unlike most IROs who transition to IR from the sell-side, buy-side or banking, you began your career as an IR coordination at Barnes & Noble and spent 21 years with the company, ultimately rising to VP of Corporate Finance & Investor Relations. What was it like building your career in IR while watching the profession itself evolve over the years?

Andy: I cannot think of another role that is as rewarding as investor relations, and I've been extremely fortunate to have built my entire career in the profession. One of the core tenets of IR is building strong relationships across the organization to truly understand every aspect of the business. IR gives you exposure to virtually every function within the organization, including merchandising, operations, marketing, finance, legal, and communications. Most other corporate roles tend to be more siloed, while an IRO's perspective is much broader. Combine this with the external dimension of engaging with sophisticated investors and hearing their perspective on the company and the industry, and it becomes an incredibly dynamic role. What has been incredibly rewarding to see over my career is how the IR role itself has evolved. What was once viewed primarily as a finance or communications function, or some combination of the two, has become a highly valued strategic role for many companies, with a real seat at the table in shaping long-term strategy.

Q: In our prep call, we discussed how the "sell-side-to-IR" transition can come with challenges. From your perspective, what are some of those challenges, and how has building your career without previous sell-side experience ultimately worked to your advantage?

Andy: I think the two backgrounds are very different, each providing distinct yet useful skills to management teams. The choice ultimately comes down to the specific expertise that management wants to incorporate. Someone coming into IR from the sell-side brings a strong external perspective, including deep industry knowledge and constant exposure to how investors think about sectors, companies and valuation. For someone who builds a career in IR or transitions from another corporate role, the advantage is a deep, internal understanding of how businesses operate. You understand businesses beyond the surface level, including how and why strategic decisions are made, how trade-offs are evaluated, and what is really driving performance. That depth of understanding has been a real advantage for me, as it allows IR to provide context, explain the "why" behind results, and communicate with credibility.

Q: Looking at soft and technical skills, what advice would you give to emerging talents in Investor Relations who may not come from traditional finance or banking backgrounds?

Andy: For those without a finance or accounting background, I'd highly recommend taking NIRI's introductory financial courses. I'd also recommend working directly with their colleagues on the FP&A and accounting teams to review the P&L, balance sheet and cash flow statement, both to understand how they work and what's driving the trends over time. Lastly, one of the best pieces of advice I received early in my career, and still follow today, is to read The Wall Street Journal every day. It really is an education unto itself.

Q: When the IR hat comes off, what hobbies and interests keep you busy?

Andy: Spending time with my family, exercising, and, after 21 years at Barnes & Noble, reading every day!

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



Upcoming Events



NIRI NY Northeast Regional Conference

NAVIGATING COMPLEXITY: Redefining Investor Relations in a Complex World

Date: Tuesday, March 24th, 2026

Time: 11:00 am - 7:00 pm

Location: Jay Bryant Park - 109 W 39th St, NYC

[REGISTER NOW](#)

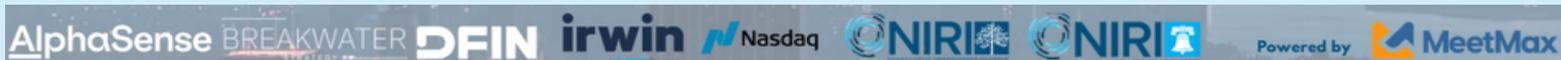
**REGISTER
NOW**

[VIEW THE AGENDA](#)

What to Expect

- Engaging discussions led by seasoned IR practitioners.
- Timely perspectives on capital markets and strategic IR challenges.
- Opportunities to connect with colleagues across the IR community.
- A closing cocktail reception to continue conversations and build new relationships.

Conference Sponsors



The Global Investor Relations Revolution:

A conversation with seasoned IROs
in collaboration with Broome Yasar and Computershare Georgeson

[I want in!](#)

Date: Monday, March 30th

Time: 6:00 - 8:30 p.m. ET

Location: Computershare, 51 W 52nd St
(Entrance on 53rd between 5th and 6th)

- ✓ An insightful and dynamic conversation on the future of global investor relations, led by Oscar Yasar, Author of [The Global Investor Relations Revolution](#).

Panelists:

- **Tiffany Willis** - (Recently Fmr.) Head of IR, Starbucks
- **Carolynne Borders** - Chief IR Officer, GE Healthcare
- **Laura Kiernan** - Head of IR, Clear Channel (Fmr. of Rivel)
- **Aaron Bertinetti** - CEO, Investor Engagement, North America, Computershare

Have an idea for an impactful event?

Contact programs@niriny.org to suggest a topic or partner with us.



Join us on **March 12th** from 6pm-8pm for **NIRI NY NextGen's Speed Mentoring event**

Hosted in partnership with S&P Global



NextGen's Speed Mentoring Event is a fun, engaging, and insightful opportunity to ask questions and learn from multiple experienced professionals in the IR industry, all in one night!

Confirmed mentors include:

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

Register for the event [here](#).

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

- Social meet-ups and networking opportunities with peers at a similar career level
- Educational events like discussion panels, speed mentoring, and company presentations, featuring experienced IROs
- Facilitated access to a host of activities organized by NIRI National and NIRI NY Chapter
- A pressure-free community where no question is too basic and everyone is open to help



Join Today!

If you are interested or know someone who could benefit from the NextGen Program, please contact the team at 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