2022 NIRI Southeast Conference
March 29-30, 2022
In-person at the Atlanta Country Club (virtual attendance option will be available)

Tuesday, March 29, 2022

3:00 pm – 5:00 pm: Investor Relations 101

3:00 pm to 3:45 pm

Setting Up an Effective IR Program – the how-to framework for the one-person IR professional. How to leverage internal resources: Marketing, Communications, FP&A, Strategic Planning, Legal, M&A, Operations and others can become your extended team! Examine what external resources add real value to assist you in the development of your key investment thesis, scripts, presentations, NDRs and investor days.

- **Moderator: Calene Candela,** Group Director - Investor Relations, Ryder System, Inc.
- Panelists include senior IROs and investor relations consultants

3:45 pm to 4:00 pm – Break

4:00 pm to 4:45 pm

Managing Sell-Side and Buy-Side Relationships – Discuss strategies to target new sell-side coverage, attract the right investors for your stock, manage expectations, choose the right guidance metrics for your company, balance C-Suite availability to key investors, and how to reach out to new target investors.

- **Moderator: Chris Agnew,** Senior Vice President, Head of Investor Relations & FP&A, Travel+Leisure Co.
- **Panelists: Mary Turnbull,** Managing Director, Corporate Access, Raymond James & Associates
- **Jeff Karcher,** Regional Head – Southeast, New York Stock Exchange (Intercontinental Exchange)

5:00 pm – 9:00 pm: Reception at Atlanta Country Club with Live Music

Cocktail reception, hors d'oeuvres, and networking with live music from The Decades Band!

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Wednesday, March 30, 2022: NIRI Southeast Conference

7:30 am to 8:55 am: Breakfast & Networking

8:55 am to 9:00 am: Opening Remarks

- **Dan Aldridge -** Managing Partner Asbury IR, President NIRI Atlanta

9:00 am – 10:00 am: Passive/Index Investing Update

- **Moderator: Douglas Yones** – Head of Exchange Traded Products, New York Stock Exchange
- ETF Leadership from State Street, Invesco & Nuveen

10:00 am – 11:15 am: ESG…What's changed and what to be prepared for in 2022 and beyond…a multi-stakeholder view of the future

- Impending regulatory burden: what you should be preparing for, and measuring now
- Disclosure: how to ensure you're well positioned for inclusion in the emerging world of ESG funds
- Practical solutions: here directly from a leading IRO on their journey and plans for continued evolution

  Speakers

  - **Moderator: Michael Rosen** – Head of ESG Strategy & Engagement, CECP
  - **Brian Matt** – Head of ESG Advisory, NYSE (Regulatory/Exchange View)
  - **Harry Etra** – CEO HXE Partners, (Strategic Advisory View)
  - **Mary Winn Pilkington** – SVP of IR and Comms, Tractor Supply (IR View)
  - **Ima Edomwonyi** – Senior ESG analyst, Franklin Templeton (Buyside/Investor view)

11:15 am – 11:30 am: Break

11:30 am – 12:00 pm: Lunch

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12:00 pm – 1:00 pm: Retail Shareholder Engagement

- How to engage with this growing shareholder group

Speakers

- **Moderator: Dan Aldridge** – Managing Partner, Asbury IR
- **Jason Rechel** – VP IR, Sprout Social
- **Angnes Watson** – CEO, Stock Perks
- **TBD** – IHS Markit

1:00 pm – 1:45pm: Economic Update from The Atlanta Federal Reserve

- **Paula Tkac** – SVP & Associate Research Director, Atlanta Federal Reserve Bank

1:45 pm – 2:45 pm: Keynote – Update on Capital Markets Regulation and Trading

Speakers

- **Steve Grasso** – CEO, Grasso Inc & Current CNBC contributor
- **Steven Lin** – Serial entrepreneur and strategic advisor to companies
- **Ryan Costello** – Former congressman from PA, Lobbyist, Advisor

2:45 pm – 3:00 pm: Closing Comments