



## AGENDA

### 8.30 am Registration & breakfast

### 9.00 am Welcome & opening remarks

Neil Stewart, editor-at-large, *IR magazine*

### 9.15 am Shareholder engagement: during and after the proxy season

- Governance hot spots in 2012
- Tracking the investor 'stewardship' movement
- Shareholder forums, director Q&A, virtual annual meetings and other new engagement channels
- Boosting proxy voting levels

#### Session leaders

**Cathy Conlon**, vice president of strategic development, Broadridge

**Chris Evenden**, senior manager of investor relations, NVIDIA

**Janice Hester-Amey**, portfolio manager, CalSTRS

### 10.30 am Refreshment break

### 10.45 am Web clinic: what's next for the internet, and why it matters

- Quick-fire case studies of companies using social media to their advantage
- Measuring the reach of online communications
- Reporting to senior management on the costs vs benefits of social media
- Examples of using social media monitoring and other web analytics to identify trending topics

#### Session leaders

**Shel Holtz**, principal, Holtz Communications + Technology

**David Putnam**, vice president of product management, StockTwits

**Darin Wolter**, executive vice president of global sales, Marketwire

### 12.00 noon Lunch & networking

### 1.15 pm Questions for the sell side/questions about the sell side

- How to manage analysts when you have too many – or too few
- Grading the effectiveness of sell-side firms and tiering access accordingly
- What do investors want from an investor day, a site visit or a non-deal roadshow?
- Using the sell side as a source of market intelligence

#### Session leaders

**Heidi Flaherty**, vice president of finance and investor relations, Advent Software

**Tara Dhillon**, vice president of investor relations, NetApp

**Kash Rangan**, managing director, analyst & head of software equity research, Bank of America Merrill Lynch

### 2.30 pm Five buy-side trends to watch

- Increasing mobility of mandates
- Traditionally conservative funds looking for liquidity
- The explosion of ETFs and their effect on your stock
- Long-term shift to indexation
- Globalization of portfolios

#### Session leaders

**Brian Matt**, director of data strategy and analytics, Ipreo

**Scott Williamson**, managing director of iShares institutional client investment strategy, BlackRock

### 3.45 pm End of event