Program sponsored by:

2017 NIRI-Rocky Mountain Summit
Agenda & Event Speakers

Telling the Capital Allocation Story:
Aligning Corporate Strategy, Returns, and Capital Allocation
Thursday, April 6, 2017 | 2:00 – 5:00 pm

2:10 – 2:40 pm
Session 1: Capital Markets and Capital Allocation Overview: Trends & Expectations

- Latest trends in equity offerings, debt, private sector, shareholders, and global markets
- Post-election implications on interest rates, taxes, investments, and international trade

Brett Bonet

VP of Equity Capital Markets, J.P. Morgan

Brett Bonet is a Vice President in the Equity Capital Markets group based in New York. Bonet joined J.P. Morgan in 2013 and focuses on the marketing and execution of equity products for clients across the Diversified Industries space. His clients include Atkore International, Costamare, Ferrari, Fiat Chrysler Automobiles, Genesee & Wyoming, John Bean Technologies, Seaspan, ViaSat, and ZTO Express. Bonet holds an M.B.A. in Finance and Accounting from the University of Chicago Booth School of Business and a B.A. in Economics and Internationals from Brown University.

Ram Chivukula

VP of Corporate Finance Advisory, J.P. Morgan

Ram Chivukula is in J.P. Morgan's Corporate Finance Advisory where he advises senior executives and Boards of Directors on strategic corporate finance issues, including capital structure, shareholder distributions, cost of capital, mergers and acquisitions, valuation, and risk management. He also authors client reports on corporate finance policy and new capital market developments. Chivukula has 10+ years of experience in financial services across banking, consulting, and academia and has been with J. P. Morgan since completing his doctoral studies. He holds an M.B.A. and Ph.D. in Finance from the University of Chicago Booth School of Business and a B.S. in Applied Mathematics & Statistics from Johns Hopkins University. He is a native of Hyderabad, India, and is fluent in English, Hindi, and Telugu.

Eugene Y. Sohn

Executive Director of Equity Capital Markets, J.P. Morgan

Eugene Sohn is an Executive Director in the Equity Capital Markets group based in New York. Sohn joined J.P. Morgan in 2005 and currently works on the marketing and execution of equity capital market products for Diversified Industries clients, including Air Lease, Camping World, Canadian Pacific, Ferrari, Jeld-Wen, Kansas City Southern, Norwegian Cruise Lines, Viasat, and XPO Logistics.

2:40 – 3:25 pm

Session 2: Fireside Chat: Aligning Corporate Strategy and Capital Allocation

- C-Suite perspective on capital allocation decision-making
- Balancing the trade-offs: organic investments, M&A, returning cash to shareholders

Tamara D. Fischer

Executive Vice President/Chief Financial Officer,
National Storage Affiliates Trust

Tamara Fischer serves as NSA's executive vice president and chief financial officer, a position she has held since the company's inception in 2013. Fischer is responsible for managing the accounting, financial reporting and finance teams, investor relations, and capital markets activity, as well as acquisitions. She was instrumental in the planning and execution of NSA's initial public offering in 2015. Prior to joining NSA, Fischer held executive vice president and CFO positions with Vintage Wine Trust, and earlier with Chateau Communities, both real estate investment trusts. Her experience included overseeing an IPO, several mergers and acquisitions, capital markets activity, and investor relations, along with financial reporting and administrative responsibilities. Fischer is a Certified Public Accountant (inactive) and graduated from Case Western Reserve University with a bachelor's degree in business administration.

Michael Rumley

Global Treasurer, Molson Coors Brewing Company

Michael Rumley is the Global Treasurer of Molson Coors Brewing Company where he is responsible for leading and planning the company's strategic treasury initiatives including capital markets and funding, cash and liquidity management, corporate financial management, banking and rating agency relationship management, financial risk management, global treasury operations, management of global pension fund schemes, and helping oversee the company's M&A activities. In his 15 years with Molson Coors, Rumley has held numerous financial roles including 3 years as the Chief Financial Officer of Molson Coors International. Prior to joining Molson Coors, he worked in investment banking with well-known firms such as Goldman Sachs, UBS, and Dresdner-Kleinwort-Wasserstein.

Moderator: Kevin Kim
Global Sr. Manager of Investor Relations at Molson Coors

Kevin Kim is the Global Senior Manager of Investor Relations at Molson Coors, a leading global beer company. Since joining the firm in 2013, he has improved the reach and impact of the Investor Relations program at Molson Coors. Prior to Molson Coors, Kevin served at Crocs, the footwear company, where for 3 years he served in investor relations and financial planning and analysis functions. Prior to that, Kevin was a sell-side equity research analyst covering consumer stocks for Robert W. Baird and D.A. Davidson. Kevin graduated from the University of Oregon with a bachelor's degree in economics and political science. He also earned his MBA from the University of Colorado Denver.

Break 3:25 – 3:40 pm

3:40 – 4:10 pm
Session 3: Investor Perspective: Assessment of Return on Invested Capital

- How the Street looks at returns - strategy, capital allocation, industry, and growth cycle
- Long-term strategy measured by a short-term world

Eric Hewitt
VP and Portfolio Manager, OppenheimerFunds

Eric Hewitt serves as lead portfolio manager of the Oppenheimer Small Cap Value strategy, co-portfolio manager of the Oppenheimer Mid Cap Value strategy, and senior research analyst for the Oppenheimer Large Cap Value and Dividend Value strategies. Prior to joining the firm in 2013, Hewitt was a product and customer portfolio manager responsible for multiple value strategies at Columbia Management Investment Advisors; senior equity analyst and portfolio manager AllianceBernstein; and a bond trader and funding specialist at Lehman Brothers. Hewitt holds a B.A. in political science and international relations from the University of Wisconsin and an M.B.A. with a concentration in finance from the University of Minnesota – Carlson School of Management.

4:10 – 5:00 pm

Session 4: IRO Panel: Insights from the Front Line with our Local Experts

- Managing the execution and articulation of strategic capital allocation with Wall Street

Liz Bauer
Chief Communications and Investor Relations Officer,
CSG International

In this role, Bauer directs CSG´s global investor relations, brand, marketing, and corporate communications initiatives. She has almost 20 years of experience with CSG and was instrumental in the early growth of the company. She has performed as a strategic advisor to the company's leadership team during key points in CSG's evolution, including repositioning following an ownership change, executive leadership transitions, multiple integrations following acquisitions and various new product launches. Bauer serves on the board of the National Investor Relations Institute. She holds a bachelor's degree in business administration from Creighton University.

Pete Crowe
SVP Communications and Marketing, RE/MAX

Pete serves as the SVP Communications and Marketing at RE/MAX, joining the company in fall 2013. Since that time, he established the Investor Relations function and now leads the Marketing, Media, Communications, Social Media, Public Relations, and Events teams responsible for supporting the RE/MAX and Motto Mortgage franchise brands. Pete joined the RE/MAX team with a strong background in business strategy, communications, and financial analysis, having excelled in management positions at Fortune 500, consumer retail, and tech consulting companies. Pete approaches every challenge with curiosity and confidence, whether it's launching a new brand, developing a strategic roadmap, helping take a company public or executing an acquisition.

Steve O'Brien
VP of Investor Relations, Arrow Electronics

Steven O'Brien is vice president, investor relations for Arrow Electronics, Inc. He is responsible for advancing Arrow Electronics' investor communications strategy. His duties include messaging strategic initiatives and financial performance to investors and equity analysts, and providing competitive intelligence and monitoring stock market conditions for the executive team. Prior to joining Arrow, O'Brien served as an equity research analyst f at Jefferies and J.P. Morgan where he focused on the software, IT hardware, communications, and data networking equipment, and technology supply chain industries. O'Brien has an A.B. from Harvard College with a concentration in economics.

Ann Scott
VP of Investor Relations, Ball Corporation

Ann Scott, Vice President, Investor Relations for Ball Corporation**,** is a long-time IRO at a global large-cap and serves as a Senior Roundtable Member for the National Investor Relations Institute (NIRI). Throughout her 29-year career at Ball, Ann moved into positions of increasing responsibility in the administrative, treasury, and finance departments, and assumed overall responsibility for the company's investor relations program including serving on the disclosure, sustainability, and governance committees and as competitive intelligence liaison to the strategic planning department. Ann has been named Institutional Investor's Best IR Professional for Basic Materials, Paper & Packaging sector for the last eight years.

Moderator: Tim Quast
President and Founder, ModernIR

Tim Quast is an Investor-Relations veteran and founder and President of Modern IR. The company, launched in 2005, is a financial technology company that uses Big Data analytics to translate complex market data into trading and investment behaviors for public companies. ModernIR pioneered the application of data-analytics to IR market intelligence and invented Market Structure Analytics™ for issuers and is now the largest provider of next-generation market intelligence to public companies. A NIRI member since 1995, Tim is a frequent speaker and commentator on modern equity trading. Tim served as the first investor relations officer at SureWest Communications. Before that, Tim was co-founder, President and Chief Operating Officer of global retail investor-relations services company Informed Investors, Inc., from 1995 until its merger with Wilink Plc (PrecisionIR) in 2001.

Please join us for the Post-Summit Social at Shanahan's from 5:00 – 7:00 pm.