

2025 Midwest Investor Relations Symposium
Mission-Critical Strategic IR
Agenda as of September 12, 2025

7:30 a.m. - 8:30 a.m. Registration, Networking Breakfast and Exhibitor Showcase (Main Hallway)

8:30 a.m. - 9:15 a.m. Trusted, Strategic, Essential: The Modern IRO's Brand

As an investor relations officer, establishing yourself as a trusted, strategic advisor to the C-suite and board of directors is essential. Your ability to be seen as a proactive, insightful and dependable partner – both in day-to-day operations and during pivotal moments – can significantly elevate your impact. This panel will feature two seasoned IROs who have successfully built their credibility and positioned themselves as indispensable strategic partners. These veteran IROs will share challenges and success stories that helped foster their credibility with the leaders and boards of their organizations.

Panelists:

Dexter Congbalay, Vice President of Investor Relations, McDonald's Corp.

Yijing Brentano, Head of Investor Relations, UL Solutions

Moderator: Jeff Myers, Midwest Regional Head, NYSE

9:15 a.m. - 9:30 a.m. Break, Exhibitor Showcase and Early Bird Raffle (Main Hallway)

Meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.

9:30 a.m. - 11:00 a.m. Activists at the Doorstep: IRO Leadership in Preparation and Defense

Activist shareholders continue to target public companies at near-record levels, often urging alternatives or transactions, criticizing capital allocation or perceived operational challenges, or demanding leadership changes. While more than 100 companies faced a public approach from an activist during 2025's proxy season, the vast majority of engagement with activist investors occurs behind the scenes. Join an experienced adviser for an interactive session that simulates an escalating series of scenarios, showing how activists identify a company to target, engage privately and rally publicly, and how IROs can lead through these high-stakes moments.

Speaker: Christopher Drewry, Partner, Latham & Watkins LLP

Moderator: Dan Scorpio, Head of M&A and Activism, H/Advisors Abernathy

11:00 a.m. - 11:15 a.m. Break / Exhibitor Showcase (Main Hallway)

Network with your IR colleagues and meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.

11:15 a.m. - 12:00 p.m. Steady Hands in a Storm: Crisis Management and Messaging in Uncertain Times

What happens when your earnings script is the least of your worries? In this candid conversation, a seasoned investor relations officer will walk through real-world experiences navigating corporate crises, market disruptions and periods of heightened uncertainty. We'll explore how to manage internal alignment and external messaging when facts are still developing, and how to communicate with confidence when executives, investors and employees are all looking to IR for answers. Whether you're building your crisis playbook or refining your executive voice, this session will offer practical advice and firsthand perspective from someone who's been in the hot seat.

Panelists:

Cody Justus, Chief of Staff, Global Sustainability Engagement & Partnerships, Boeing

Jason Omerza, Vice President of Investor Relations, CNH Industrial

Chinmay Trivedi, Senior Vice President of Finance, 3M

Moderator: Jeremy Apple, Senior Vice President, Financial Profiles, Inc.

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- 12:15 p.m. - 1:15 p.m.** **Featured Luncheon Speaker/Fireside Chat: Your Seat in the Modern Board Room: What Can IR Bring to the Table?**
Speaker: Douglas Chia, President, Soundboard Governance LLC
As a former corporate secretary and expert on corporate governance, Chia will discuss the mission-critical elements necessary for IR officers to be strong strategic advisors to the modern board of directors.
Moderator: Victor Jendras, Senior Vice President, Alliance Advisors
- 1:15 p.m. - 1:30 p.m.** **Break / Exhibitor Showcase (Main Hallway)**
Network with your IR colleagues and meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.
- 1:30 p.m. - 2:30 p.m.** **Keynote: Navigating the Stock Market: Insights from the Trading Floor**
Speaker: Jay Woods, Chief Global Strategist, Freedom Capital Markets
With a distinguished trading career including more than 25 years as a Designated Market Maker at the New York Stock Exchange, Jay Woods brings a wealth of firsthand experience and perspective in understanding today's complex market landscape. In his presentation, he will share insights from decades of navigating market cycles, responding to rapid technological advancements and staying agile in an environment shaped by uncertainty and shifting investor behavior. Drawing from his deep understanding of trading trends, Jay will share lessons learned and how to find clarity amid the evolving dynamics of the stock market.
- 2:30 p.m. - 2:45 p.m.** **Break / Exhibitor Showcase (Main Hallway)**
- 2:45p.m. - 3:30 p.m.** **Going Public: An IRO Journey**
Taking a company public is a defining milestone – and for investor relations officers, it's a journey filled with strategic decisions, intense preparation and building a communication strategy. In this session, seasoned IR officers will walk you through the initial public offering process from the inside out. This session offers a candid look at the IR officer's evolving role before, during and after going public, from building the equity story and navigating regulatory requirements to managing investor expectations and sustaining momentum post-IPO.
Panelists:
Scott Einberger, Head of Investor Relations, Amrize
Evan Barbosa, Vice President, Investor Relations, Lineage
Moderator: Sarah Cluck, VP of Investor Relations, Aledade
- 3:30 p.m. - 5:30 p.m.** **Networking Reception and Prize Drawing (The Park – Outdoor patio)**
End the day with a beverage, appetizers and conversation with your fellow workshop participants. Plus, you could win some great prizes when we do our prize drawing at approximately 3:45 p.m. **(You must be present to win!)**