



Sponsored by:

PJT Camberview

WACHTELL, LIPTON, ROSEN & KATZ

Thursday, October 12, 2023 | 10:45am – 6:00pm | New York City

10:45 – 11:20 Registration, Coffee and Mingling

11:20 – 11:30 Welcome Remarks

11:30 – 12:30 Impact of the 2023 Proxy Season on Off-Season Engagement

John Roe, BlackRock
Isabel Shaw, Goldman Sachs Asset Management
Sara Donaldson, Voya Investment Management
Carolina San Martin, Wellington Management
Moderated by Adrienne Monley, PJT Camberview

12:30 – 1:00 Conversation with Robin Washington, Lead Independent Director of Salesforce and Director at Alphabet, Honeywell International and Vertiv Holdings

With Igor Kirman, Wachtell, Lipton, Rosen & Katz

1:00 – 2:00 Small Group Luncheon

2:00 – 2:30 Dessert and Coffee in the Main Room

2:30 – 3:30 Looking Ahead to 2024: Shareholder Proposals, SEC Regulations and More

Tim Youmans, Calvert
Emma Butler, Dimensional Fund Advisors
Caitlin McSherry, Neuberger Berman
Michael Younis, State Street Global Advisors
Moderated by Carmen Lu, Wachtell, Lipton, Rosen & Katz

3:30 – 3:40 Break

3:40 – 4:40 Recent Developments in Shareholder Activism

Sonia Lurie, Dodge & Cox
Jackie Condron, Mellon Investments
Donna Anderson, T. Rowe Price
John Galloway, Vanguard
Moderated by Erica Lukoski, PJT Camberview and Lina Tetelbaum, Wachtell, Lipton, Rosen & Katz

4:45 – 6:00 Reception
