



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
Bob Herr, Lord Abbett
Caitlin McSherry, Neuberger Berman
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 Condrón, 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
-