

Advanced Investor Relations: International Practices of Financial Communications

22 – 26 November 2027
Zoom

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Training Center

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Advanced Investor Relations: International Practices of Financial Communications

Ref: 36327_65356 **Date:** 22 – 26 November 2027 **Location:** Zoom **Fees:** 1500 Euro

Course Overview:

This course provides a complete guide for professionals seeking to excel in investor relations within today's global financial markets. With a focus on advanced investor relations, participants will delve into international investor relations practices aimed at enhancing corporate financial communications and developing strategies to attract capital. Whether dealing with investor relations for private companies, private equity investor relations, or debt investor relations, this course equips participants with the necessary tools to effectively manage investor communications, navigate legal frameworks, and design successful strategies. The course will also emphasize the creation of shareholder value, crisis communication, and corporate governance. Participants will explore various tools such as investor relations reporting systems, financial calendar development, and investor relations budgets to optimize financial disclosure practices. From mergers and acquisitions to roadshow formats, attendees will learn the most effective ways to engage with investors, analysts, and the media, enabling them to become invaluable assets to their organizations.

Target Audience:

- Investor Relations Officers
- Corporate Communications Managers
- CFOs and Financial Analysts
- Private Equity Managers
- Corporate Governance Advisors
- Compliance Officers

Targeted Organizational Departments:

- Investor Relations Departments
- Corporate Communications Departments
- Financial Planning and Analysis Teams
- Private Equity and M&A Divisions
- Corporate Governance Departments

Targeted Industries:

- Financial Services
- Private Equity
- Public Companies in Global Markets
- Telecommunications
- Energy and Utilities
- Technology and Biotech

Course Offerings:

By the end of this course, participants will be able to:

- Design and implement advanced investor relations strategies.
- Master the art of competing for capital in global markets.
- Navigate investor relations for private companies and debt investor relations.
- Develop and manage financial communications strategies.
- Ensure compliance with legal requirements such as price-sensitive information disclosure.
- Handle crisis communication in high-pressure environments.
- Build long-term shareholder loyalty and retention.

Training Methodology:

The training methodology includes interactive case studies and group discussions. Participants will engage in real-world scenarios such as financial communications, investor roadshows, and crisis management, followed by feedback sessions. Workshops will cover quantitative and qualitative factors in investor relations, financial calendar development, and managing corporate governance during mergers. Interactive sessions will ensure participants apply investor relations tools effectively.

Course Toolbox:

- Course Workbooks
- Financial Communication Templates
- M&A and Corporate Governance Checklists
- Crisis Communication Plans
- Shareholder Value Creation Guides
- Investor Relations Calendar Template

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Course Agenda:

Day 1: Competing for Capital and IPO Dynamics

- **Topic 1:** Competing for Capital: Introduction to Investor Relations
- **Topic 2:** Why Go Public? Exploring the Benefits and Challenges
- **Topic 3:** The Four Phases of Investor Relations in an IPO
- **Topic 4:** Investor Relations for Private Companies
- **Topic 5:** Private Equity Investor Relations
- **Topic 6:** Debt Investor Relations
- **Reflection & Review:** Discussing IPO phases and private company investor relations strategies

Day 2: Keys to Successful Investor Relations

- **Topic 1:** Seven Keys to Successful Investor Relations
- **Topic 2:** Clearly Defined Goals in Investor Relations
- **Topic 3:** Importance of Senior Management Commitment to Investor Relations
- **Topic 4:** Building a Flexible and Scalable Investor Relations Organization
- **Topic 5:** Coordinating Financial and Strategic Communications
- **Topic 6:** Investor Relations: Profiles and Job Descriptions
- **Reflection & Review:** Reviewing the role of management and organization in successful investor relations

Day 3: Investor Relations Tools and Legal Requirements

- **Topic 1:** Investor Relations Tools: Contact Database and Monitoring Tools
- **Topic 2:** Investor Relations Budgets and Resource Allocation
- **Topic 3:** Understanding and Complying with Legal Requirements
- **Topic 4:** Price-Sensitive Information and Disclosure Obligations
- **Topic 5:** Periodic Financial Disclosure: Financial Accounting Information
- **Topic 6:** The Convergence of Investor Relations and Corporate Communications
- **Reflection & Review:** Evaluating tools and legal requirements for effective investor relations

Day 4: Best Practices in Investor Relations

- **Topic 1:** Identifying Shareholders: Legal and Technical Means
- **Topic 2:** Attracting and Retaining Shareholders: Intelligent Targeting
- **Topic 3:** Developing the Financial Calendar: Key Considerations
- **Topic 4:** Crafting Compelling Financial and Strategic Messages
- **Topic 5:** Shareholder Value Creation and Corporate Governance
- **Topic 6:** Corporate Social Responsibility and Investor Relations for Employee Shareholders
- **Reflection & Review:** Discussing strategies for shareholder retention and corporate governance

Day 5: Investor Relations Events and Measuring Success

- **Topic 1:** Successful Investor Relations Meetings and Roadshows
- **Topic 2:** Analyst and Investor Days: Objectives and Planning
- **Topic 3:** Conference Calls and Investor Relations Communication
- **Topic 4:** Crisis Communication in Investor Relations: Anticipating Challenges
- **Topic 5:** Quantitative and Qualitative Factors in Measuring Investor Relations
- **Topic 6:** Awards and Perception Studies for Investor Relations
- **Reflection & Review:** Assessing the success of investor relations programs and crisis communication

How This Course is Different from Other Investor Relations Courses:

The course stands out due to its deep dive into global investor relations practices, especially focusing on international markets and competing for capital in diverse environments. Unlike other courses, this program covers the full spectrum, from private equity to debt investor relations, and addresses mergers and acquisitions in a hands-on format. The use of case studies from global IPOs, alongside in-depth sessions on roadshows and conference calls, makes this course the perfect fit for professionals seeking to advance in this critical field.