

NIRI Silicon Valley Chapter

February 23, 2021

Dear fellow NIRI Silicon Valley and NIRI NorCal members,

I wanted to provide everyone with a quick update on where things are with our chapter and what's planned ahead. In 2020 we all faced new challenges, adapted and we are stronger for it. [We ended the year on a high note](#) by giving back to our local community and beating our \$3,000 fundraising target for the Second Harvest food bank of Silicon Valley. [Our chapter raised \\$3,540](#) which was enough to supply over 7,000 meals to those in need during the holiday season!

We expect to be virtual for the remainder of this NIRI season (ending June 2021), but the NIRI Silicon Valley board is working to plan activities and support collaborations that can still bring us together virtually. We are postponing our Silicon Valley Spring Seminar in 2021. We've found there's an abundance of good virtual content and, rather than competing with it, we prefer to partner and help curate the best of the best. What follows is a list of events our chapter is supporting in February and March.

- [Thursday, February 25th – 12 – 1pm PT: Lunch Break – Free to Members](#)

- Adapting your IR Program to the Virtual World - We've learned a lot in 2020 and look forward to sharing our knowledge and best practices in the virtual world as IROs plan their strategy in what is certain to be a shifting landscape in 2021. We will have an interactive discussion with several IROs about how they have adapted their IR programs to the virtual world

Speakers:

[Maggie O'Donnell](#), Director of Investor Relations and Communications, Wix

[Martin Lam](#), Director of Investor Relations, Atlassian

[Mark Loehr](#), CEO of OpenExchange

Moderator: [Vern Essi](#), Senior Director, Investor Relations and Corporate Development, Inphi

[Register Here for Lunch Break](#)

- [Wednesday, March 17th – 3 – 4:30pm PT: March Madness](#)

- **Join NIRI chapters and sponsors, while raising money for charity, through a friendly trivia showdown.** NIRI chapters across the country can create a team of 5-10 members to compete for bragging rights in a lively St. Patrick's Day trivia competition (In the event a chapter gets more than 10 participants, the chapter can create and register more than one team). We will be using TriviaHub to run a 3-round, 90-minute

competition. Winning chapters will receive money to donate to the charity of their choice. Contestants are encouraged to dress up and drink up during this fun-filled happy hour event.

- **NIRI Silicon Valley Has A Team Competing in the event. If you would like to participate, please email NIRISV board member Shelia Ennis at sbe@abmac.com**

- **[Tuesday, March 23rd – 7:30am – 2:30 PT: IR Magazine Forum – \\$95 Early Bird Rate \(expires 3/5\)](#)**
 - [Full Day Agenda](#) includes a lot of relevant and interesting topics. Please see the end of this letter for more details on this event

[Register Here for IR Magazine Forum 2021](#)

- **[Thursday, March 25rd – 1:00 – 3:30 PT: IR Magazine Awards -- US 2021 \(Free to Attend\)](#)**
 - See the end of this letter for more information and a summary of this event

Back in October, I wrote that in times like these, we must avoid isolating ourselves, even though it feels like the path of least resistance. Instead, we can all benefit from fostering existing relationships, making new connections, and learning from one another. That's where your NIRI Silicon Valley and NorCal Chapter comes in. Yes, this unfortunately still has to be done via virtual platforms even though we are all fatigued from them, but eventually, it will translate to the real-world, and we will all be grateful for making the most of these unusual times. When it comes to IR, we all know that nobody has all the answers, but together we can be better, find the best solutions and make our careers more successful and fulfilling.

Your NIRI Silicon Valley Board is focused on making our Chapter a vehicle to help bring us together in a world where we are forced to be apart. With this in mind, we have simplified our board structure around three committees, each focused on driving action and activities aligned with our Mission to help ensure the ongoing vibrancy and value of our Chapter.

Mission: The NIRI Silicon Valley Chapter was formed to advance the practice of investor relations within the local business environment. In keeping with this mission, the Chapter focuses on IR education, mentoring, and networking with the broad professional community. Our goal is to further the skills of our members, to expand their business opportunities, to increase Chapter membership, and to foster an environment that promotes IR learning for all.

As I mentioned at the start of this Chapter year, this marks my sixth year on the NIRI Silicon Valley Board and my first as President. I'm grateful to those Board members who have come before me as I inherit a very healthy chapter. Between NIRI Silicon Valley and NIRI NorCal, we have over 150 members and

NIRI Silicon Valley President's Mid-Year Letter

growing. Our theme for the last few years was "Cutting Through The Noise." We've decided to keep this theme for the upcoming year with a minor modification. Our Chapter will now be focused on "Cutting Through The Virtual Noise."



I don't have to tell you that there is more high-quality IR content produced in today's virtual world than any one IR professional or IR team could ever consume. As a result, our Board continues to direct our energy towards curating and driving discussion and engagement around the excellent content that is already being produced and offered to all of us in easily accessible ways. More than ever, we are focused on collaborating with other chapters and IR organizations. All of this supports our objective of communicating and fostering discussions and engagement amongst chapter members. This is where we believe the NIRI Silicon Valley Chapter can provide unique value to our members.

Our Board's three overarching goals this year remain unchanged:

- **Curating.** Calling your attention to the best IR educational content from partners and sponsors via direct emails, social media, and our NIRISV.org website.
- **Collaborating.** Providing informal zoom chats and events (like the "Lunch Break" we are doing again this week) where members have the opportunity to speak and meet new people in a low-key setting. In addition, we are working on a NextGen program and providing opportunities to work with other NIRI chapters.
- **Communicating.** Focusing efforts on informing and sharing ideas within our IR community and driving more dialogue via surveys, social media, and our website. We hope to dive deeper into topics like diversity and inclusion and further our efforts to make positive, impactful strides.

The NIRI Silicon Valley Board is a diverse group of IR professionals (listed on the next page) across industries, market caps, and tenure. We look forward to helping all our members cut through the virtual noise, focusing on curation, collaboration, and communication! Please email any thoughts or ideas to us at board@nirisv.org and we hope to see you all virtually this Thursday!

Sincerely,

Kevin Kessel

Kevin Kessel, CFA

President, NIRI Silicon Valley

Vice President, Investor Relations and Market Analytics at KLA

More Information on IR Magazine Events That NIRI Silicon Valley is Sponsoring

- **Tuesday, March 23rd – 7:30am – 2:30 PT: IR Magazine Forum – \$95 Early Bird Rate (expires 3/5)**
 - **Full Day Agenda** including topics like:
 - Regulators, Reddit and a recovery? A recap on what's happened in IR and what could be to come
 - The post-pandemic IR function 2021
 - How are IR teams building marketing calendars this year?
 - Stream One: A guide to ESG index and fund inclusion
 - International exposure and opportunities for new capital sources exposed by the pandemic
 - Expanding your reach and knowing your shareholders better through your investor meetings
 - Making the most of your virtual shareholder meetings
 - Corporate access is changing... but how are you adapting?
 - The final thought: Natural language processing and artificial intelligence for investor relations professionals

[Register Here for IR Magazine Forum 2021](#)

- **Thursday, March 25rd – 1:00 – 3:30 PT: IR Magazine Awards -- US 2021 (Free to Attend)**
 - “The **IR Magazine Awards – US 2021** will take place on **Thursday, March 25** as a **virtual awards ceremony**. We will once again be bringing together the investor relations community to celebrate and honor excellence in the IR profession. Since the annual event first launched in 1996, tens of thousands of analysts and investors have voted in the surveys that fuel the awards. The result: **vital benchmarking information** on which companies do the best IR. In recent years, the awards program has expanded to recognize more aspects of an IRO's role as we add new categories to the list and give IR teams the opportunity to nominate themselves.
 - “By popular demand, we present two types of award categories – researched and nominated – both celebrating the success of those individuals and companies that are leading the way in IR across the US. For our **researched categories**, companies do not submit nominations. Instead, hundreds of analysts and investors cast their votes and give their opinions on which companies provide the best IR service. In our **nominated categories**, companies submit written entries to articulate their success and achievements from the past year, giving any publicly listed company the opportunity to be considered for an award.”
 - **[View the 2020 Highlights](#)**

NIRI Silicon Valley 2020 – 2021 Board of Directors

- Kevin Kessel, President, VP of IR and Market Analytics at KLA
- Meghan O'Leary, Director at Large, Head of IR at Silicon Valley Bank
- Kate Scolnick, Director at Large, VP of Finance at Anaplan
- Kim Watkins, Treasurer, VP of IR at Intuit

Digital Content, Communications and Marketing Committee

- Traci Tsuchiguchi, VP of IR at Citrix
- Ben Lu, VP of Finance at Logitech
- Tesh Dahya, Director IR at HP
- Elaine Gaudioso, IR Manager at Box

Programs and Seminars Committee

- Mary Turnbull, Managing Director and Head of Corporate Access at Raymond James
- Vern Essi, Senior Director of IR and Corporate Development at Inphi
- Susanna Chau, Director of IR at Atara
- Jennifer Zibuda, Director of IR and Communications at Prothenas

Sponsorship and Membership Committee

- Shelia Ennis, SVP at Abernathy MacGregor
- Bill Choi, SVP of IR and Strategic Finance at Zscaler

Board Volunteers

- Mary Lai, VP of IR at NortonLifeLock
- Katherine Chen, Director of IR at Flex

If you are interested in the rewarding experience of getting more involved with the NIRI Silicon Valley Chapter please email us at board@nirisv.org or just reach out to any board members directly.