NIRI Twin Cities

How to Get Better Targeting Outcomes

Join Moderator Brad Mills, CEO of Valuation Metrics, San Francisco to discuss why investors decide to meet with companies, the investment decision-making process, and targeting best practices to ensure the outcome companies want.

Friday, November 20

Webinar details will be distributed upon registration

TIME:

11:30 AM – 12:30 PM CST

COST:
Open to all NIRI members at No Charge

QUESTIONS:

Bernadette McCormick at 612-376-7979 or email bernadette.mccormick@businesswire.com

PLEASE RSVP BY:
NOVEMBER 17

Program Highlights: **This is an opportunity for you to learn more about:**

- How companies can get better targeting outcomes by understanding how the buy and sell side work and make decisions.
- How technology can help companies assess how they fit with an investors long strategy, or for that matter, activist, short, trading, data mining etc.



Mr. Mills co-founded Valuation Metrics Inc. in 2011 and has served as the company's Chief Executive Officer since that time. Prior to co-founding Valuation Metrics, Brad served as a Senior Vice President of Bear Wagner Specialists focused on business development and strategy. Brad also served as Managing Director of Corporate Development at the NYSE listings group and held management roles at Aptegrity and Pitney Bowes. Brad served on the board of the NIRI San Francisco Chapter and has been a NIRI member for 15+ years. Brad holds a Bachelor of Arts degree in Economics and in Government from Connecticut College.



Mr. Rossman is the Head of Shareholder Advisory at Lazard and advises clients in connection with preparing for and responding to shareholder activism. Mr. Rossman joined Lazard in 2003 and has over 25 years of experience as both a lawyer and investment banker. Mr. Rossman earned a B.A. from Kenyon College, an *M.A.* from The University of Virginia, and a *J.D.* from New York University School of Law.



Mr. Rutledge is Portfolio Manager at Bessemer Trust. In this role, he leverages the firm's best thinking and works collaboratively with a team of highly experienced analysts and researchers to manage our Large Cap Global Equities Strategy. He previously served as Portfolio Manager for Large Cap Core and Large Cap Strategies, as a team leader for the industrial and utilities sectors of global equities, and as a research analyst for the U.S. Mid Cap equity portfolio. He is a member of the firm's Investment Committee. Jeff earned an M.S., with distinction, in management-finance from the Naval Postgraduate School and a B.S. in industrial engineering from Lehigh University. He is a CFA® charter holder.

Holders of the NIRI IRC® credential can earn 1 professional development unit (PDU) per meeting/webinar. IRC-credentialed speakers may also earn PDUs. More information is available at www.niri.org/certification.

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