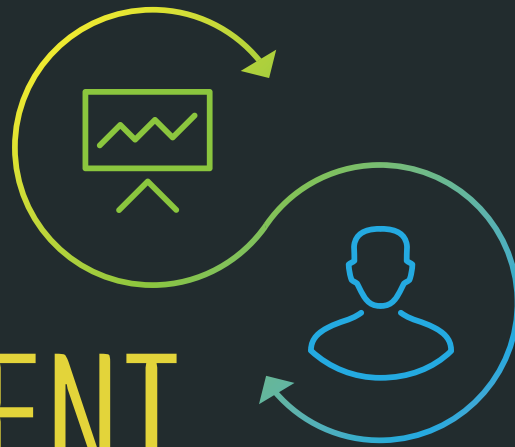


✓ CHECKLIST

IMPROVING INVESTOR ENGAGEMENT



Ensuring investor engagement is never an easy task, which is why we have compiled a list of seven major events throughout the fiscal year with tips to help better involve your company's shareholders.





EARNINGS CONFERENCE CALLS AND SUPPORT MATERIALS

Perhaps the most critical component to improving shareholder engagement is bettering the earnings conference calls. Consider adding the following to help investors stay updated with quarterly reports:

- Script
- Clearly defined slides
- Audio recording or webcast

INVESTOR/ANALYST DAYS

Analyst Days are a great time to update shareholders on important information and new developments. For optimum engagement, make sure to invite:

- Current investors
- Prospective stakeholders
- Former investors
- Buyside and sell-side analysts

IR CONFERENCES

IR Conferences are a great way to refresh current investors and meet new shareholders, especially if there are significant changes to report. In order to keep everyone informed, make sure to discuss the following:

- Management changes
- Strategic focus
- Revised goals and priorities

MARKETING DAYS

Marketing days are good for both new and existing analysts/bankers, and allow:

- Investors to build interest in the company's long-term goals
- CEO and CFO to personally interact with shareholders
- The opportunity to explore the company's strategic plans

PRESS RELEASES

Press releases are a great tool to keep stakeholders updated with pertinent developments within the company. Help investors best understand the key concepts by:

- Summarizing content in 3 – 5 bullet points
- Organizing bullet points in order of importance

CLEAN WEBSITE

A clean and well-designed company website is a fantastic resource for shareholders to get up-to-date information. For the best engagement, make sure your website is:

- Mobile-friendly/responsive
- Clean
- Easy to navigate

ORGANIZED PROXY STATEMENT

A well-organized proxy statement will help investors understand important financial and voting information. To help with reader comprehension, consider including:

- Charts/graphs
- Color
- Images (especially helpful for executive biographies)
- Summaries

