We are thrilled that your CEO will be participating in CECP’s third **CEO Investor Forum (CIF).** Please find within a few ways that your communications team can leverage your CEO’s participation in the event and create a platform to talk about your company’s CSR initiatives. The following toolkit includes content into which you may quickly insert your information and send out through your communications channels.

**It’s important to let your stakeholders know that your CEO is taking part in this event, so please choose at least one way to spread the news. Even one tweet will go a long way.** We appreciate your support!

We will be monitoring the news and internet for mentions of the CEO Investor Forum**, but please also let us know how you use this toolkit and share final products with us. We are happy to distribute and share items that you create to develop additional awareness.**

For more information, please contact Sara Adams at 212-825-1252 or [sadams@cecp.co](mailto:sadams@cecp.co).

Please find within:

* **Helpful Links**
* **Template Press Release**
* **Template Social Media Posts**
* **Newsletter Article/Blog Post Questions**
* **Helpful Links:**
  + **CECP** 
    - [@CECPTweets](https://twitter.com/CECPtweets)
    - [**CECP CEO and Companies list**](http://cecp.co/home/our-coalition/ceo-and-company/)
  + **Strategic Investor Initiative and CEO Investor Forum** 
    - Hashtag to use: #CIF2018
    - <http://cecp.me/2ke78Ir> Strategic Investor Initiative webpage short link
    - [Strategic Investor Initiative webpage](http://cecp.co/home/our-coalition/strategic-investor-initiative/)
    - [CEO Investor Forum webpage](http://www.cvent.com/events/cecp-ceo-investor-forum-2-26-2018/event-summary-dc278a274f7d43028096ddbaa0045cab.aspx)
    - [CEO Investor Forum Agenda](http://www.cvent.com/events/cecp-ceo-investor-forum-2-26-2018/agenda-dc278a274f7d43028096ddbaa0045cab.aspx)
    - First CEO Investor Forums Materials
      * [Executive Summary](http://cecp.co/wp-content/uploads/2017/05/2017-CIF-Exec-Summary_Final.pdf) (February 2017)
      * [CEO Presentations](https://www.youtube.com/playlist?list=PL6LRcE0zA2zzAOB5BBHiX-eCmM7Wy1Yh5) (February 2017)
      * [Photos](https://www.flickr.com/photos/24359360@N04/albums/72157677342468634)
    - Second CEO Investor Forum Materials
      * [Executive Summary](http://cecp.co/wp-content/uploads/2017/11/September-2017-CIF-Exec-Summary_Final.pdf) (September 2017)
      * [CEO Presentations](http://cecp.me/SeptemberCIFVideos) (September 2017)
      * [Photos](https://www.flickr.com/photos/24359360@N04/albums/72157688909562626)
  + [Flickr photo album CEO Investor Forum](https://www.flickr.com/photos/24359360@N04/albums) (photos will be posted on 2/28/18 for your use)
* **Template Press Release**

Add your CEO’s name to the lead paragraph, as well as a quote on his/her reflections on or expectations of the event (either to send before or after with a change in tense and takeaways from the event).

**[insert company name] Presents Long-Term Plan to**

**Leading Institutional Investors**

***CECP’s CEO Investor Forum Promotes Integrating Environmental, Social, and Governance Components in Long-Term Business Plans***

***Month, Date, New York, NY***— [insert CEO and company name], as part of [CECP: The CEO Force for Good](http://cecp.co/)--a coalition of more than **200 corporations collectively representing $7 trillion in annual revenue**--will present the company’s long-term plan to leading institutional investors at CECP’s [CEO Investor Forum](https://www.cvent.com/events/2017-board-of-boards-sii-afternoon-session/registration-ec6f65e6f3fa4d0294ba2d30e07ee023.aspx) February 26, 2018. Additional confirmed CEO presenters include:

* **Keynote: Michael Bloomberg,** Founder, Bloomberg LP and Bloomberg Philanthropies & 108th Mayor of New York City
* **David Abney**, Chairman & CEO, UPS
* **Kenneth Frazier**, Chairman & CEO, Merck & Co., Inc.
* **Alex Gorsky**, Chairman & CEO, Johnson & Johnson
* **Omar Ishrak**, Chairman & CEO, Medtronic Plc
* **Paul Polman**, CEO, Unilever PLC

CECP created the CEO Investor Forum after [**86% of CEOs at CECP’s 2016 Board of Boards said they spent too much time focused on the short-term**](http://cecp.co/wp-content/uploads/2016/12/BofB16_Executive_Summary_FINAL_Web.pdf?redirect=no). In addition, institutional investors have repeatedly called for a fundament change in the way public companies define value creation. Heeding these calls, CECP created the [**Strategic Investor Initiative**](http://cecp.co/membership/strategic-investor-initiative.html) (SII) **to move trillions in capital** by working with leading companies to develop and deliver their long-term plans to institutional investors.

[insert your CEO quote]

“While leading investors and companies plan over time horizons longer than the next quarter, today's system records, reports, and rewards short-term behaviors,” said **Daryl Brewster**, CEO, **CECP**. “Too much of today's communication flow focuses on short-term traders, not how companies will innovate and adapt to long-term changes in the marketplace. What’s needed now is a ‘firth earnings call’. CECP's CEO Investor Forum is the first setting that publicly brings together CEOs with institutional shareholders to break this cycle so that investors can better assess how well a management team addresses its significant stakeholders and drives sustainable value."

The convening will be held at the Time Warner Center in New York City, **February 26, 2018** from 12:00 p.m. – 6:30 p.m. The agenda and list of confirmed presenters and attendees [can be found here](http://www.cvent.com/events/cecp-ceo-investor-forum-2-26-2018/event-summary-dc278a274f7d43028096ddbaa0045cab.aspx). **The CEO Investor Forum will be live-streamed via a link on the** [**SII webpage**](http://cecp.co/home/our-coalition/strategic-investor-initiative/)**. Presentations from the forum will be available on participating company websites.**

Corporations interested in reserving the few remaining investor presentation afternoon sessions at the 4th CEO Investor Forum April 19, 2018 in San Francisco should contact Mark Tulay, [mtulay@cecp.co](mailto:mtulay@cecp.co).

**SII Advisory Board**

* **SII Co-Chair: Bill McNabb**, Chairman & CEO, **Vanguard**
* **Lee Ballin,** Head of Sustainable Business Programs, **Bloomberg**
* **Jonathan Bailey**, Managing Director and Head of ESG Investing, **Neuberger Berman**
* **Crystal Barnes**, Senior Vice President Global Responsibility and Sustainability, **Nielsen**
* **Dana Bezerra (Pancrazi),** Vice President, Capital Markets, **F.B. Heron Foundation**
* **Glenn Booraem**, Principal and Investment Stewardship Officer, **Vanguard**
* **Daryl Brewster**, CEO, **CECP**
* **Anthony Di Meo**, Director, Investor Relations, **BD**
* **Michelle Edkins**, Managing Director, Global Head of Investment Stewardship, **BlackRock**
* **Robert Fernandez**, CFA, Vice President, Director of ESG Research, **Breckinridge Capital Advisors**
* **Benjamin Gigot**, Vice President of Research, Investment Management, **CDPQ**
* **Evan Harvey**, Director of Corporate Responsibility, **NASDAQ**
* **Hans Hirt,** Executive Director and Head of **Hermes EOS**
* **Erika Karp**, Founder, CEO and Chair of the Board, **Cornerstone Capital Inc.**
* **Paula Loop**, Assurance Partner and Leader, PwC’s Governance Insights Center, **PwC**
* **Teri Loxam**, Vice President, Investor Relations, **Merck**
* **Graham Macmillan,** Senior Program Officer, **Ford Foundation**
* **Gianna McCarthy**, Director of Corporate Governance, **Office of the New York State Comptroller**
* **Mark McDivitt**, Managing Director, **State Street Global Exchange**
* **Kathleen McLaughlin**, President, Walmart Foundation & Global Head of Sustainability, **Walmart**
* **Tim Nixon**, Head of Sustainability Thought Leadership, Managing Editor Sustainability, **Thomson Reuters**
* **Brian Rice**, Portfolio Manager, **CalSTRS**
* **Amy Springsteel**, Assistant Vice President, **Voya Financial**
* **Mark Tulay**, Director, Strategic Investor Initiative, **CECP**
* **Dennis Whalen**, Leader, Board Leadership Center, **KPMG**
* **Tim Youmans**, Research Director, Strategic Investor Initiative, **CECP**

CECP thanks the Ford Foundation, the Heron Foundation, and Bloomberg for their support of the Strategic Investor Initiative.

*Note to Editors: CECP’s* ***Daryl Brewster****, CEO, and****Mark Tulay****, Director, Strategic Investor Initiative, are available for comment on the CEO Investor Forum. Please contact Jackie Albano,*[*jalbano@cecp.co*](mailto:jalbano@cecp.co)*,*[*646-863-1926*](tel:646-863-1926)*to arrange interviews.*

# # #

**[Insert company boilerplate]**

**ABOUT CECP: THE CEO FORCE FOR GOOD**

*CECP is a CEO-led coalition that believes that a company’s social strategy — how it engages with key stakeholders including employees, communities, investors, and customers —determines company success.  Founded in 1999 by actor and philanthropist Paul Newman and other business leaders to create a better world through business, CECP has grown to a movement of more than 200 of the world’s largest companies that represent $7 trillion in revenues, $18.6 billion in societal investment, 13 million employees, and $15 trillion in assets under management. CECP helps companies transform their social strategy by providing customized connections and networking, counsel and support, benchmarking and trends, and awareness building and recognition. For more information, visit* [*http://cecp.co*](http://cecp.co)*.*

**ABOUT THE STRATEGIC INVESTOR INITIATIVE**

*The Strategic Investor Initiative is a coalition of thought leaders committed to the long-term movement. Collectively, SII is developing a new platform for leading companies to create, convey, and deliver long-term plans to long-term investors. SII’s vision is to spark the movement of trillions of dollars of capital to companies demonstrating performance excellence over the long-term. SII provides tools and resources designed to introduce and support market behaviors that ultimately deliver sustained long-term value for all stakeholders.*

*More at* [http://cecp.co/sii](http://cecp.co/home/our-coalition/strategic-investor-initiative/)

* **Template Social Media Posts**

Personalize these posts for your company and audience. Please follow us at @CECPtweets and use our hashtags #BoB2018 and #CIF2018 to join our efforts to get out the word about Board of Boards and the CEO Investor Forum, respectively.

**Sample Twitter posts:**

* Looking forward to seeing investors and CEOs share how to promote long-term thinking in #business, including @X CEO X X #CIF2018 #ESG
* CEO X X is promoting our company’s long-term strategic planning at the #CIF2018 <http://cecp.me/2ke78Ir> #CSR #Sustainability #ESG
* .@X CEO X X attending @CECPTweets #CIF2018 with fellow CEOs and leading institutional investors <http://cecp.me/2ke78Ir> #ESG #CSR #Sustainability
* .@X CEO X X presenting to long-term oriented investors at @CECPTweets #CIF2018 <http://cecp.me/2ke78Ir> #ESG #CSR #Sustainability
* .@X CEO X X inspired by @CECPTweets #CIF2018 <http://cecp.me/2ke78Ir> #ESG
* .@X CEO X X gaining insights on long-term business plans #CIF2018 <http://cecp.me/2ke78Ir> #ESG #CSR #Sustainability

**Sample Facebook and LinkedIn Posts:**

* XX CEO is making a long-term plan presentation to 200+ institutional investors, demonstrating a focus on mutual business and investor needs to drive long-term value creation.
* XX CEO is talking to other CEOs of the world’s largest companies and investors about ways they can collaborate through business to develop solutions to the world’s toughest challenges.
* XX CEO was inspired by CECP speakers and other “Force for Good” CEO leaders at the 2018 Board of Boards and CEO Investor Forum.
* **Newsletter Article/Blog Post Questions**

Here are some questions to guide you in the creation of an article for your internal or external communications channels, sharing your CEO’s takeaways from the event.

* Why was it important to attend the CEO Investor Forum?
* What did you hope to get out of the Forum?
* Why was it important to talk to investors about these topics?
* What is your personal motivation for addressing long-term value creation as a top business priority?
* How do you see long-term value creation addressing important business challenges?
* How do you define your company’s long-term focus—how you express the importance of focusing on societal issues through the business, for the long-term?