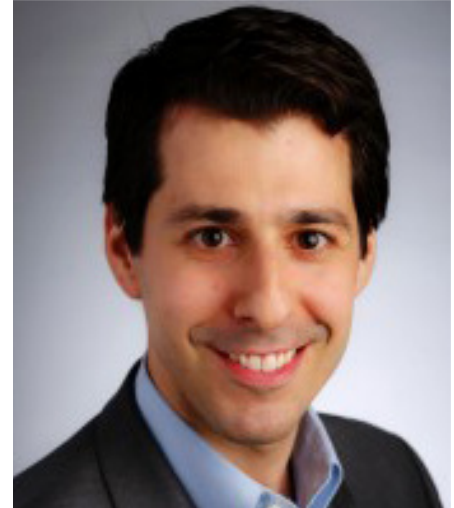


CECP Speakers Bureau

## Michael Rosen

Head of Capital Markets Engagement,  
CEO Investor Forum  
CECP



As Head of Capital Markets Engagement for the CEO Investor Forum, Michael works with corporate issuers, the buy side and sell side, and other capital markets participants and service providers to deliver the Forum's mission of rewiring the capital markets towards the long term.

Michael comes to the CEO Investor Forum from the sell side where he was most recently a Director of Investor Access at UBS Investment Bank. In this role, he advised Investor Relations Officers (IROs) on the development and implementation of high ROI investor marketing programs as well as broader industry trends including MiFID II and the mainstream shift by active investors toward integrating financially material ESG factors into their investment processes. Prior to joining UBS, Michael held various positions on both the buy side and sell side including J.P. Morgan Asset Management, Morgan Joseph TriArtisan Group, and Citi Global Markets.

Michael has an MBA from Temple University's Fox School of Business, a BA in Political Science and Spanish from the University of Michigan and is a member of the New York Chapter of the National Investor Relations Institute (NIRI).

### Areas of Expertise

Drawing from an extensive background in the capital markets, Michael can share his expertise in topics including:

- The rise of stakeholder capitalism and the purpose-driven economy
- Refocusing investor expectations from short-term earnings to long-term value creation
- Buy side ESG integration trends
- Sell side ESG research
- MiFID II
- Corporate/Investor Access

### Recent Speaking Engagements

- NIRI Webinar: Leveraging the Power of Retail Investors: Your Company's Invested Ambassadors
- IR Magazine's ESG Forum
- CECP's Executive Workshop on Long-Term Sustainability and ESG Disclosures
- NIRI Southeast Fall Conference: Evolution of Corporate Access

- > To submit a speaker request for Michael Rosen, please email [info@cecp.co](mailto:info@cecp.co) with an event description and date.



CEO  
Investor  
Forum

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### Specific Speaking Topics

#### The Emergence of the Purpose-Driven Economy

The COVID-19-induced economic crisis continues to drive short-term decision making throughout the corporate world, an approach that has plagued society for decades through both economic expansions and downturns. The financial and non-financial costs to society are, in large part, a direct consequence of Corporate America's long adherence to the Friedman Doctrine with shareholder primacy as its North Star. However, there have been an increasing number of signposts surfacing that suggest society is becoming unwilling to accept these other stakeholder sacrifices for the benefit of shareholders. History is in the process of writing the story of how the COVID-19-induced economic crisis was the event that ultimately sealed the fate of shareholder capitalism, propelling forward a new, more just economic paradigm – stakeholder capitalism and the new purpose-driven economy. Learn what this means for today's corporate executives and how they should be communicating with their institutional investors and other key stakeholders.



#### Leveraging the Existing Capital Markets Infrastructure to Accelerate Systemic Change

Developed in partnership with Professor George Serafeim of Harvard Business School and KKS Advisors, as well as long-term institutional investment managers and asset owners, the CEO Investor Forum's Long-Term Plan Framework is a proprietary, market-tested investor communications solution that empowers CEOs to articulate their long-term business strategy (over the next 3 to 7 years) across nine themes and 22 forward-looking, decision-relevant disclosures. Learn how the CEO Investor Forum is incentivizing CEOs to communicate more long-term, forward-looking disclosures to all stakeholders.

#### Set the Context. Own the Narrative. Lead for the Future.

Designing an investor communication strategy is critical to ensuring a company's share price reflects the fundamental value of a company's business. What is the right mix of events and forward-looking disclosure? What are the challenges and opportunities that can arise from partnering with the sell side on investor outreach? What is the best way to communicate a company's long-term strategy to the market? Learn best practices for developing and implementing a long-term investor outreach strategy.

