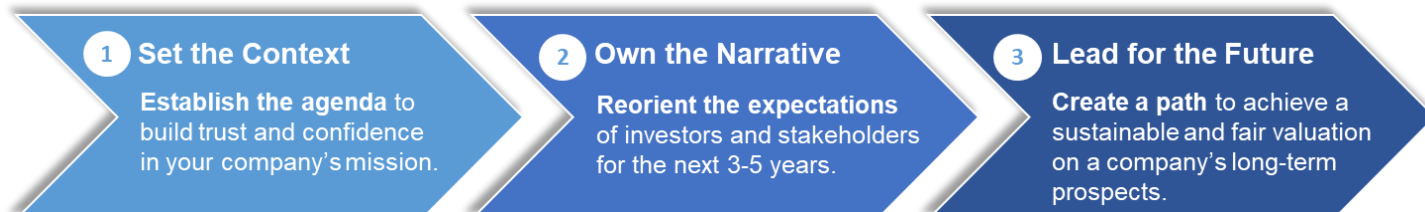




Preparing the Capital Markets for Stakeholder Capitalism and the Emerging Purpose-Driven Economy

Known as the Purpose Generation,¹ Millennials already represent 50% of the U.S. workforce² and are emerging as the next generation of managers, executives, and institutional and retail investors. They believe business has a responsibility to be transparent about its values, make a positive contribution to society and align financial performance with its principles and corporate purpose – the key elements of the emerging purpose-driven economy.

Chaired by Bill McNabb, *former Chairman and CEO of Vanguard*, the CEO Investor Forum supports and guides cross-functional corporate leaders and their CEOs on developing and communicating their long-term value creation strategy to institutional investors and other key stakeholders. Through the [Long-Term Plan Framework](#), developed in partnership with Harvard Business School Professor George Serafeim and KKS Advisors, **bespoke tools and advisory services**, and both **educational and Reg-FD events**, the Forum empowers corporate leaders and their CEOs to proactively:



CECP: Your Cross-Functional Strategic ESG & Investor Communications Advisor



"It is through the groundbreaking efforts of the **CEO Investor Forum** that companies and investors can change the impact businesses have on the world."

- Bill McNabb, CEO Investor Forum Co-Chair & Former Chairman & CEO, Vanguard



¹ Korn Ferry: Millennials: The Purpose Generation

² Case Foundation: Millennial Engagement

³ SEC: The Importance of Disclosure – For Investors, Markets, and our Fight Against COVID-19

The CEO Investor Forum

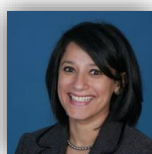
Refocusing investor expectations toward the long term

Through the **Long-Term Plan Framework**, the CEO Investor Forum helps CEOs change the conversation they have with investors from short-term earnings expectations to sustainable, long-term value creation. In partnership with KKS Advisors, Professor George Serafeim, and institutional investors, the Forum's proprietary Long-Term Plan Framework empowers CEOs to articulate their long-term strategy across **nine themes and 22 forward-looking, decision-relevant questions**:



CEO Investor Forum Network Offering	
Educational and Networking Resources	Long-Term Plan Preparation Resources
<ul style="list-style-type: none">➤ ESG Company Snapshot: Demystify the ESG ecosystem of ESG ratings providers, ESG standards and policy setters, reporting frameworks as well as a snapshot of your company-specific ESG data currently used by financial analysts in their investment decision-making and proxy voting➤ Ongoing Education & Resources: Monthly webinars, quarterly workshops and thought leadership from experts in ESG and long-term value creation themes➤ Virtual CEO Roundtables: Quarterly Chatham House rules peer discussions for CEOs➤ Member Networking: Gain insight from peers on preparing and communicating Long-Term Plans➤ CEO Investor Forum Event Access: Includes access to the annual flagship CEO Investor Forum event and virtual sector-specific events	<ul style="list-style-type: none">➤ Forward-Looking Disclosure Assessment: Custom assessment of your company's existing public disclosures against the investor-informed Long-Term Plan Framework to identify the areas of strength and opportunity in your company's long-term, <i>forward-looking</i> decision relevant disclosures➤ 1:1 Briefing with Forum's Research Team: Video call to discuss analysis findings and provide guidance on best-practices for preparing and communicating your Long-Term Plan➤ Long-Term Plan Development Resources: Access to past CEO presentations and disclosure assessments➤ Insights & Benchmarking Hub: Access to assessment analysis methodology, peer disclosure briefs and market and industry research (<i>coming 4Q20/1Q21</i>)➤ Automated Long-Term Plan Development: An interactive tool for creating your company's Long-Term Plan (<i>coming 1Q21</i>)

For more information on how the CEO Investor Forum can help your CEO and investor relations program refocus investor expectations toward the long-term, please contact:



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