



**NIRI Boston Members,**



Fresh off the heels of Q4 reporting, you're probably already deep into Q1, annual reports and proxy season...oh my! In our first quarter, the unpredictable northeast winter unfortunately caused us to postpone our first NIRI Boston event of 2014, but we were able to make up for it in February and March with some very informative programs.

In February, Smooch Reynolds, Vice President and Global Investor Relations and Communications Practice Group Leader at DHR International, and author of "Be Hunted!" - a guide to establish and maintain strong relationships with recruiters to help find your dream job - shared valuable tips with our group on how to get on a headhunters' radar and how to advance your IR career. In March, our esteemed panel covered several topics on corporate valuation including how investor risk tolerances change over time, intrinsic vs. relative valuation frameworks, differences in public and private equity pricing, and the role of IR as it relates to investor valuation analysis.

We have just two exciting programs left in the 2013-2014 programming year. On April 16, some of your favorite IR service providers will enter a shark tank of IR veterans who will pose tough questions to help determine how they will best spend their IR budget dollars. And then on May 5, we welcome Coleman Lannum, Vice President of Investor Relations at Covidien and IR Magazine Awards' grand prix winner for best overall IR by a large-cap company for 2011, 2012, 2013 and 2014, who will share insights with the group on developing a strategic program to attract the highest quality investors and analysts to your company while working within your executives' calendar constraints.

In June, we hope to see many of you in Las Vegas at NIRI's Annual Conference. We'll be hosting a NIRI Boston meet-up prior to the IR services showcase for all local attendees, not just members. So watch your inbox for details to come on that soon. And finally, mark your calendar for our yearend social on June 26 at Miel Brasserie Provençal at the Intercontinental Boston. Come catch up with your NIRI friends and colleagues before the summer season kicks into full gear. We'll have great food and drinks and will host our annual awards ceremony.

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**Upcoming Events**

**April 16 - Shark Tank: IR Services Showdown**  
[Register](#)

**May 5 - Assessing Corporate Access Today**  
[Register](#)

**June 26 - Season Finale at Miel Brasserie Provençal (Intercontinental Boston)**

**Platinum Sponsors**



As always, an enormous thank you to our sponsors, members and Board. Without all of you, we wouldn't have such a fantastic organization!

Sincerely,  
[Meredith Kaya](#)  
NIRI Boston President

## Mobilizing Your IR Program

*Jeff Corbin, CEO and Founder, theIRapp*



Welcome to the Spring and the 21st Century! It's that time of the year where companies are beginning to think about and prepare for their annual analyst day, or perhaps plan one for the first time. However, something is different this time around that didn't exist several years ago. And that's the fact that almost every investor or analyst in a public company now has something in common - they each have a smart mobile device (or maybe two or even three iPhone, iPad or Android mobile devices). As the research shows, investors are becoming more dependent on their mobile device to receive investor information and are requiring that the content provided be easy to access and read.

In an ongoing study conducted by theIRapp® of institutional investors, nearly 80% of respondents said that they had issues accessing investor related content from their mobile device. In the same study, over 65% of respondents said they would be more inclined to review a company's investor presentation, press release or SEC filing if it was available and easily readable on the mobile device. With this information, it is clear that now is a good time to at least start considering a mobile IR strategy in order to cater to investors' 21st Century needs.



### Gold Sponsors



### Recent Events

[IR Career Development: Be Seen, Be Ready, Be Hunted](#)

[Shareholder Activism: The Best Defense is a Good Offense](#)

[Corporate Access: It's a Two Way Street](#)

### Officers & Directors

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There are certain key events where mobile communications can prove beneficial both to the company and its investors. Take for example the quarterly conference call. What happens when the analyst or buy-side investor is out of town, is on an airplane or has a conflict with another call on the same day at the same time? Notwithstanding this, they most likely will need to listen to the call (yes, a transcript will become available - but for many investors the tone of the CEO's voice during the call is just as important as what he or she says). Mobile technology now allows for this via the viewing of the webcast in an app. It also allows for the "push" of the archive of the call directly to the investor's mobile device in a matter of seconds so they no longer have to request that the IRO send it to them or be relegated to a desktop computer to listen to the call on the company's website.

[Continue Reading](#)

## Member News

Congratulations to NIRI Boston's honorary director and past president [Maureen Wolff](#) who was named to NIRI's 2014 class of five Fellows.



*NIRI Boston is delighted to welcome our new members:*

**Robert Bridge**, Textron Inc.  
**Paul Capozzi**, Computershare  
**Sarah Carmody**, Verenum Corporation  
**John Lynch**, Waters Corporation  
**Lauren Shaughnessy**, Synegeva BioPharma Corp.

### Standards of Practice for Investor Relations

NIRI has released an updated set of [Standards of Practice for Investor Relations: Disclosure.](#)

These comprehensive guidelines are designed to reflect current best practices in the United States in all forms of corporate disclosure.

These new voluntary guidelines replace NIRI's 2012 edition and are updated to reflect innovations in disclosure practices, including, for example, the U.S. Securities and Exchange Commission's April 2013 guidance on social media

[Aurora Krause](#) Sponsorship

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### Honorary Directors

[Jane McCahon](#) TDS, Inc.

[Karen Warren](#) Retired

[Maureen Wolff](#) Sharon Merrill

### New to NIRI Boston?

New to IR or the Boston area? Try out one of our monthly meetings. The first one is on us! Use promo code NEWBOSTON when registering.



NIRI National's Annual Conference is being held June 8 to 11 in Las Vegas. Stay tuned for details regarding a NIRI Boston meet-up.

[REGISTER TO ATTEND](#)

### Job Bank

Members of NIRI Boston are entitled to our career services. We currently have several open positions posted.

[ACCESS JOB BANK](#)

usage, new Dodd-Frank Act disclosure mandates, and recent case law.

NIRI began setting standards for the investor relations profession in 1996 with the "Standards and Guidance for Disclosure," and continued with a 1998 edition renamed the "Standards of Practice for Investor Relations," followed by 2001, 2004, and 2012 editions. Now, thousands of investor relations and other corporate executives use this reference for guidance on disclosure and interaction with analysts and investors. It is also a popular reference for securities lawyers.

This updated 92-page document includes chapters devoted to: The Investor Relations Practitioner as "Chief Disclosure Officer;" Disclosure Concepts and Theories; Disclosure Laws and Rules; Forming a Disclosure Committee/Writing a Disclosure Policy; Structured Disclosure - SEC and SRO Requirements; Voluntary Disclosure Methods; and Court Decisions and SEC Actions That Have Shaped Disclosure. These guidelines represent one component of NIRI's broader Standards of Practice for Investor Relations.

NIRI members may access an electronic version of these standards at no cost through the Standards of Practice page (<http://www.niri.org/StandardsofPractice.aspx>) on NIRI's website.

Members and non-members may purchase a professionally printed and bound version via NIRI's online store (<http://www.niri.org/action/BrowseBookstore.aspx>).

### **Mobilizing Your IR Program** (continued)

Then there is the all-important analyst day. So much time and money is spent coordinating these events. As we all know, they can take on a life of their own. A mobile IR communications strategy can add so much to the quality and longevity of these events. For starters, by having a native mobile app, you can ensure that all of your key investors and analysts are fully apprised of the event by allowing them to add the event directly to their calendar through the app and, as in the case of the conference call archive, push them a notification a day or two leading up to the event as a reminder. For those unable to travel to or attend the analyst day, you can webcast the event through the app and provide the presentations as they are being given.

Even better, by incorporating a mobile communications component to your IR program, your analyst day need not be over once the day comes to an end. Rather, through an app, you now have a direct means to continue to communicate with them on all matters relevant to their investment or prospective investment decision. Never before has technology allowed for the direct and personal

### **In Between Jobs?**

NIRI National and the Boston Chapter proudly offer Members in Transition Programs to help you stay connected throughout your job search.

[LEARN MORE HERE](#)

### **Membership Directory**

Check out NIRI Boston's new membership directory with a sorting feature.

[ACCESS MEMBER DIRECTORY](#)

### **Volunteers Needed**

We are looking for volunteers to help with various tasks, including writing summaries of our monthly events. If you are interested in getting involved with the Chapter, email [info@niriboston.org](mailto:info@niriboston.org).

### **NIRI Webinars**

NIRI hosts several valuable professional development webinars each month. Hear from your IR peers on a variety of hot topics in IR.

[WEBINAR CALENDAR](#)

### **Connect With Us**



communication between a public company and its critical investor audience and to provide documents, audio files and video in an easy to consume way. Never before has the opportunity existed to push information directly into a person's pocket knowing that they are looking for this information because they have opted in to receive a push notification to their very personal device.

As all IR professionals will agree, the goal for public companies is to provide transparent and easy access to critical company and financial information. As mobile usage continues to proliferate and as the average U.S. consumer continues to spend 2 hours and 42 minutes per day on their mobile device (to be precise), companies large and small will have no choice but to embrace a mobile IR strategy.

**About theIRapp**

We at theIRapp are proud to be a sponsor of the Boston Chapter of NIRI. To learn more about our platform and how you can put into place an easy to implement and cost-effective mobile IR communications strategy, we invite you to visit our website, [www.theIRapp.com](http://www.theIRapp.com).

NIRI Boston  
[www.niriboston.org](http://www.niriboston.org)