ir society

Professional Development Programme **2018**

Sponsored by:
Deutsche Bank Depositary Receipts

Professional Development Sponsor 2018

Deutsche Bank's Depositary Receipt group is pleased to sponsor The Investor Relations Society's 2018 Professional Development Programme for another year.

"The UK IR Society has gained an international reputation as a recognised body for representing the IR industry and for providing a comprehensive range of educational resources for its members. Deutsche Bank Depositary Receipts is very proud to be continuing our partnership with the Professional Development Programme for 2018."

Deutsche Bank Depositary Receipts
American Depositary Receipts (ADRs) are a means for non-United States companies to raise their profile with US investors, make their shares more easily available to them and raise new capital in the United States. Deutsche Bank's ADR business is dedicated to providing excellent service for companies with ADR programmes.

Deutsche Bank provides all the services necessary to set up and run a successful ADR programme plus a range of added services to ensure that both the issuing company and its investors get the most from the programme. This includes providing specialist investor relations support to companies with ADRs to assist them in communicating with their US investors.

For further information please contact:

Zafar Aziz
Director,
Head of DR IR Advisory Group

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020 7545 6619

The IR Society Professional Development Programme

Why choose our courses?
We provide a comprehensive programme of training courses for IR practitioners at every stage of their careers.

Our courses are delivered by expert trainers but what really sets them apart are the following:

- **First-hand experience:** Current IR practitioners and advisers provide invaluable first-hand insight
- **Unparalleled content:** Our extensive membership allows us to draw on a wide range of expertise on any IR-related topic
- **Up to date:** Input from practising members ensure content is timely and relevant.

Cost

Full-day course

IR Society members	£449 + VAT
Non-members	£599 + VAT

Half-day course

IR Society members	£339 + VAT
Non-members	£469 + VAT

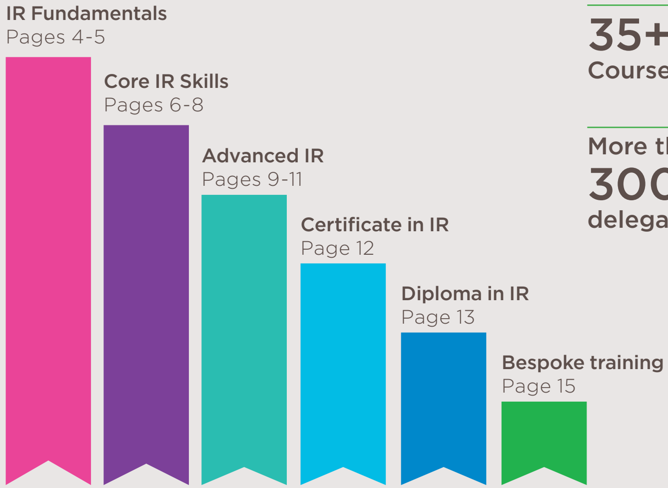
Savings to be made from multiple registrations
You can benefit from some outstanding savings on professional development courses and the Certificate in IR by becoming a member of the Society – see page 19 for more information. Furthermore, receive up to 20% discount when booking your second and third courses; speak to a member of the team for further information.

Continuing Professional Development (CPD)
We promote the highest standards amongst our members and the wider IR community. The IR Society recommends that practitioners should achieve 160 CPD points annually in order to successfully complete our CPD programme. CPD points will be awarded for attendance at events and professional development courses, as well as other activities such as reading articles and viewing webinars.

For more information on our CPD programme, in partnership with the PRCA, please visit our website

How to register
1. Register online here
2. Send an email to sophie.bennion@irs.org.uk
3. Call us on +44 (0) 20 7379 1763

Courses in detail



35+
Courses each year

More than
300
delegates in 2017

Our broad range of courses

IR Fundamentals

These courses provide an excellent introduction to IR by explaining the workings of the financial markets, identifying key relationships and developing awareness of crucial IR techniques.

- Introduction to IR and the financial markets
- Best practice in IR
- Understanding investors, analysts and the financial media: developing your key IR stakeholders
- Introduction to writing for IR
- IR for personal and executive assistants

Core IR Skills

These courses allow IR practitioners to develop their knowledge in the essential areas of understanding financial accounting, IR regulation and compliance, investor targeting, media relations and also best practice annual reporting.

- IR regulation and compliance essentials
- IR regulation update
- Demystifying company accounts and valuations
- Annual reporting – best practice in practice
- IR script writing for management presentations
- Introduction to PR
- Energise your investor targeting

Advanced IR

An increased range of Advanced IR courses are being offered in 2018, including courses on specialist financial modelling, ESG/sustainability and Debt IR.

- Financial modelling
- Advanced writing skills for IR
- Building your Debt IR capability
- ESG/SRI: Sustainability issues for IR
- Strategic approach to corporate messaging: Convergence of IR and Financial PR
- Should we be afraid or not? Hedge Funds and Sovereign Wealth Funds

Certificate in Investor Relations

The CIR has become a benchmark in the industry, widely recognised in the UK and in other international markets. The CIR is a comprehensive, stretching test of your competency in IR, providing the tools to help you develop your career in the profession.

Diploma in Investor Relations

The Diploma in Investor Relations (DipIR) is the new senior level qualification from the IR Society. Developed by expert IR practitioners and educational organisations, the Diploma will equip delegates with the skills, tools and expertise they need to become leaders in our profession.

DELIVER Programme

The DELIVER programme (Developing future leaders through investor relations) is aimed at high potential IROs who are seeking the next step up in their career.

Bespoke Courses

The IR Society offers a comprehensive programme of training courses covering investor relations techniques, issues and best practice for IR practitioners at any stage in their careers.

We can also tailor our course content to create a bespoke course to meet your exact needs and deliver it at any time and place to suit you.

2018 Course Calendar

Key IR Fundamentals | Core IR Skills | Advanced IR

January	
Thursday 25	Introduction to IR and the financial markets
Tuesday 30	IR regulation and compliance essentials (module one)
Wednesday 31	IR regulation and compliance essentials (module two)
February	
Tues 6/Wed 7	Demystifying company accounts and valuations
Wednesday 21	IR for personal and executive assistants
March	
Thursday 8	Best practice in IR
Tuesday 13	Introduction to IR and the financial markets
Thursday 15	Building your Debt IR capability
Thursday 22	IR regulation update
April	
Wednesday 11	IR regulation and compliance essentials (module one)
Thursday 12	IR regulation and compliance essentials (module two)
Tuesday 17	ESG/SRI: Sustainability issues for IROs
Thursday 26	Energise your investor targeting
May	
Wednesday 2	Financial modelling
Wednesday 9	Should we be afraid or not? Hedge Funds and Sovereign Wealth Funds
Thursday 17	Strategic approach to corporate messaging: Convergence of IR and Financial PR
June	
Tuesday 5	Understanding investors, analysts and the financial media: Developing your key IR stakeholders
Tue 12/Wed 13	Demystifying company accounts and valuations

July	
Tuesday 3	Introduction to writing for IR
Thursday 5	Introduction to PR
Wednesday 11	IR script writing for management presentations
Thursday 12	Introduction to IR and the financial markets
Tuesday 17	Advanced writing skills for IR
August	
Wednesday 8	Building your Debt IR capability
September	
Wednesday 5	IR regulation and compliance essentials (module one)
Thursday 6	IR regulation and compliance essentials (module two)
Tues 11/Wed 12	Demystifying company accounts and valuations
Tuesday 18	Introduction to IR and the financial markets
Thursday 27	Annual reporting – best practice in practice
October	
Wednesday 3	IR regulation update
Tuesday 9	IR for personal and executive assistants
Wednesday 10	Best practice in IR
Tuesday 16	Energise your investor targeting
Tuesday 23	ESG/SRI: Sustainability issues for IROs
Tuesday 30	Financial modelling
November	
Wednesday 7	IR regulation and compliance essentials (module one)
Thursday 8	IR regulation and compliance essentials (module two)
Weds 14/Thurs 15	Demystifying company accounts and valuations
Thursday 22	Introduction to IR and the financial markets

IR Fundamentals

Introduction to IR and the financial markets

Aim
This one-day course provides an excellent introduction to the world of investor relations, listed companies and the financial markets in which they operate. It explains clearly how the markets are regulated as well as looking at equity investors and the underlying Investment Principles. A Q&A session with an IR professional provides an invaluable opportunity to clarify any practical areas of particular interest to the participants. This course is relevant to anyone in IR, corporate comms or financial PR and no prior financial background is assumed.

What will I gain?
- A good insight into the role of investor relations and the financial market environment in which IR operates
- A thorough understanding of the fundamentals of financial markets
- An overview of the current regulatory environment
- An invaluable opportunity to clarify specific questions through the Q&A session

"Really useful training. Interesting topics and some clear explanations delivered by an excellent and very engaging trainer! With little knowledge on the subject, the course certainly achieved its aim for me. I found it inspiring and feel that it has given me a good understanding of the topic."

Click here for more information

Duration	1 day
CPD	40 CPD Points

Best practice in IR

Aim
This discussion-based, half-day course explores 'best practice IR' and identifies the tools and techniques available to IROs to help them achieve this. It will help you to understand the practical aspects of running a good IR programme and will be invaluable to those who are new to the role, or those looking to improve the effectiveness of their current IR activity.

What will I gain?
- An invaluable overview of shareholder targeting, investor days and site visits
- A clear understanding of effective communication and disclosure obligations
- Advice on managing relationships with shareholders, brokers and analysts
- Hints and tips for planning roadshows, webcasts and the annual report

"Excellent course! Really enjoyed the informal, conversational style of the course – interesting topics and speakers. Definitely useful for future work, when talking with clients."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Understanding investors, analysts and the financial media: Developing your key IR stakeholders

Aim
This half-day course, presented by senior practitioners, helps IR professionals build stronger relationships with their key stakeholders, through developing a better understanding of the priorities for an IR function. It explores the day-to-day roles within fund management, sell-side, and advisory firms as well as the media and their expectations of IR. This course builds on aspects covered in the Introduction to IR and the financial markets course.

What will I gain?
- In-depth insight into the workings of city advisers
- Advice on how best to build stronger relationships with these key stakeholders

"The course was very informative and delivered in a way that was easy to understand with lots of examples and case studies that really helped to put what we were learning into practice. Diane was very approachable, making delegates feel comfortable and able to ask questions."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

IR Fundamentals

Introduction to writing for IR

Aim
This hands-on course is designed for IR and corporate communications professionals who want to improve their writing within a corporate context. This full-day workshop will help you to write impactful IR communications, using case studies to ensure your key messages are delivered to the market consistently and aligned to your core company narrative.

What will I gain?

- Insight into how to deliver key messages to the market consistently
- Understanding effective messaging via press releases, factsheets, websites and annual reports
- Practical examples of dos and don'ts when communicating with stakeholders
- Insights into writing for social media communications

"A very useful and informative course, delivered in a relaxed learning environment. Great split between theory and exercises."

Click here for more information

Duration	1 day
CPD	40 CPD points

IR for personal and executive assistants

Aim
Personal and executive assistants who come into contact with investors, analysts and external advisers need to understand the role of IR and this engaging full-day course will help you do just that. This course will explain the financial jargon, who the key participants are, what to prioritise, what information can be disclosed and how you can best support senior management.

What will I gain?

- A good insight into IR and how to support senior management
- An understanding of the dynamics of financial markets, including the key participants
- A solid understanding of the financial jargon and the sensitivity around disclosure of information

"This course was one of the most interesting and informative courses I think I have had the pleasure to attend. It was an honour to be trained by Deborah who was attentive and very helpful when I didn't quite understand certain parts of the presentation. Being new in the field of IR was daunting to begin with, but having attended this session, I now have a greater understanding and feel I have a great foundation to build from. Thank you to all involved, I had a wonderful day."

Click here for more information

Duration	1 day
CPD	40 CPD points

Core IR Skills

IR regulation and compliance essentials

Aim
For IR professionals, compliance with rules and guidelines is an essential part of the job. Whether it is in financial reporting, market disclosures, compliance with relevant listing regimes, the treatment of inside information, or in the context of a transaction, mistakes are costly – not least in reputational terms.

Day One of this two-day course will provide a basic IR Toolkit, covering the fundamental areas of regulation and compliance that affect IR, while **Day Two** looks at more specific areas and situations, such as IPOs and transactions. Attendees will learn how the legal and compliance requirements for IR communications fit together, how they are applied in practice, and what best practice standards are.

What will I gain?

- An overview of the fundamental areas of regulation and compliance that affect IR
- A toolkit for dealing with price sensitive information, disclosure requirements, transactions and listing obligations and the financial and reporting calendar
- An overview of EU Listing Rules: IPOs, Prospectus, secondary listings, takeovers, etc.
- An understanding of stock exchange obligations
- An opportunity to discuss the practical implications of these rules with a guest speaker

It is also relevant to anyone studying for the CIR qualification. The Society recommends all members to attend this course at least once to ensure they understand the legislative environment in which they work.

"Day one was a very useful overview of the regulations, especially as a newcomer to the IR function, and bringing my knowledge up to date. I especially liked all the real life examples – companies, fines, outcomes of tougher regulation. Excellent course."

"The course made my interest in IR increase hugely – all my objectives were met and there were a lot of high quality discussions. A lot covered, and delivered very well, particularly on topics which could be considered dry!"

Click here for more information

Duration	2 day modular course
CPD	40 CPD points per module

IR regulation update

Aim
The regulatory landscape is constantly changing. This half-day course will bring you up to date with all the latest developments impacting on IR practitioners. You will explore those changes currently being made as well as those planned for the future.

This course is for people who have already attended the IR regulation and compliance essentials courses and would like an update on changes in the rules and regulations. It would also be useful for others involved in IR, such as company secretaries or finance directors.

The IR Society recommends all practitioners attend this course at least once every two years to ensure that they keep up to date with legal and best practice requirements.

What will I gain?

- An overview of the current regulatory themes
- A solid understanding of forthcoming regulatory changes
- Updates on best practice in the corporate reporting regime, corporate governance and stewardship

"A very clear and well structured course, taking a good sweep across regulatory developments. A useful update and discussion format worked very well – I would definitely recommend this course to all IROs."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Core IR Skills

Demystifying company accounts and valuations

Aim
This two-day course provides the foundation knowledge needed to understand a set of accounts and be able to answer questions from analysts, investors and the financial press. This course is designed for people who have no formal accounting training and will be of relevance for anyone studying for the CIR qualification.

Module One will clearly explain accounting jargon, together with the relevance and limitations of financial statements. You will learn how to identify which key numbers are important in communicating your company's story and the issues that need explaining.

Module Two will help you to understand in more depth how financial analysts and investors look at companies. It is not necessary to have a financial background to take Module Two, but you should have completed Module One or have an equivalent understanding of basic accounting concepts.

What will I gain?
Module One
- Foundation knowledge in understanding a set of company accounts
- Gain fluency in financial jargon
- A clear understanding of the relevance and limitations of financial statements

Module Two
- An understanding of the key principles behind most commonly used valuation methods
- A grasp of the fundamentals of the discounted cash flow valuation model and key sensitivities
- An awareness of risk and return parameters and non-financial considerations impacting investment decision making

"This course exceeded my expectations. Not only was it very informative, it was highly enjoyable. The course tutor is excellent, and made complicated concepts easy to understand. Great value for money – challenging, yet satisfying course."

Click here for more information

Duration	2 day modular course
CPD	40 CPD points per module

Annual reporting – best practice in practice

Aim
This engaging half-day course provides a comprehensive overview of the recent developments in best practice reporting - both in print and online, as well as an update on the regulatory impact of new reporting requirements. The course will also update you on new narrative reporting requirements which are on the horizon. This course will benefit anyone involved in the production of their company's Annual Report (IROs, company secretaries, group financial controllers, etc.) or service providers involved in their production.

What will I gain?
- A thorough understanding of the UK Corporate Governance Code
- An overview of how to tell the strategic story of the company
- The latest thinking on best practice integrated reporting
- The latest views on best practice online reporting

"All speakers were engaging and complementary – I liked the fact that they went into detail about the practical elements of report writing but also best website/digital practises. A great overview of where we've come to over the past few years and how people are adapting to print as well as other challenges."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Core IR Skills

IR script writing for management presentations

Aim
This interactive half-day course will help you improve the quality and effectiveness of your script writing for results presentations. It will help ensure your scripted investor communications are clear, efficient and authoritative. The course will benefit IR practitioners and advisers who write or review scripts for senior management for investor and analyst presentations or communications. Course attendees will critique existing scripts and prepare a draft script using the tips and techniques learned on the course.

What will I gain?
- Tips and techniques to produce accurate, effective and polished IR presentations
- Develop the necessary skills to deliver clear scripted investor communications and ensure your management team is presented at their best
- Learn techniques for writing quickly as well as effectively

"Very helpful and insightful – a lot of useful content and discussions. I now have much more awareness of the devices to use when creating scripts. Would highly recommend."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Introduction to PR

Aim
This half-day course focuses on the interaction between PR and IR. You will learn how PR and IR can best work together on a day-to-day basis as well as during crisis situations, and will investigate the impact of media stories on company valuation. The course will also look at the regulations around announcements, analyst and investor engagement with the media and other practical aspects from an IR perspective.

What will I gain?
- Practical insights into how PR works and the key stakeholders
- An understanding of the impacts of PR on IR and the areas where they need to coordinate
- The knowledge to identify different types of PR stories to assess their implications for IR

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Energise your investor targeting

Aim
This insightful half-day course will help you understand the benefits of proactive investor targeting. You will also get a perspective on the key requirements and tools for executing successful investor engagement. This course is ideal for IR practitioners, consultants supporting IR professionals and shareholder analysis teams.

What will I gain?
- Practical insights into leveraging outside resources and online tools
- A clear understanding of the risks and opportunities of your shareholder register
- How to maximise the support of brokers, sales teams and other providers
- A perspective on the key requirements for effective and efficient investor engagement

"Really good insights from people with lots of industry experience. I took away 3-4 interesting things that will assist me in the future. Coming from a background without much exposure to IR, this was a great way to get a wide introduction and beneficial for future work."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Advanced IR

Financial modelling

Aim

This intensive one-day course will help delegates to build financial models through a range of practical model-building exercises. It will assist in the understanding of valuations and will review the most common methodologies used by the market. The workshop-style course assumes a working knowledge of financial statements and a very basic understanding of valuation techniques. It also assumes a basic level understanding of Microsoft Excel, and delegates will be expected to bring their own laptops.

What will I gain?

- The ability to review an integrated set of P&L, Balance Sheet and Cash Flow forecasts
- A review of key forecast metrics such as: PBT, EBITA, EPS, etc.
- An understanding of the value of financial ratios to evaluate business performance
- An overview of valuation methodologies, including DCF

"The course was very detailed with good practical examples and it was very helpful to have a 'plug and play' Excel model to takeaway."

Click here for more information

Duration	1 day
CPD	40 CPD points

Advanced writing skills for IR

Aim

This intensive half-day course will help you ensure that you are getting the maximum positive effect from your daily written work. Intended for experienced IR practitioners, the course outlines the writing skills and competencies required for effective communication, and uses practical examples to identify the pitfalls to avoid.

What will I gain?

- A clear understanding of how to write effectively for IR
- An assessment of your own writing skills based on analysis of real examples
- The ability to understand effective messaging
- An awareness of the best words to use and the ones to avoid

"A very refreshing look at how to write with more clarity and a reminder of pitfalls to avoid with a good balance of practical and theoretical discussions."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Advanced IR

Building your Debt IR capability

Aim

This informative half-day course will look at current best practice in debt IR, how to deliver an effective debt IR programme, and will discuss the benefits of proactive debt IR engagement. No previous knowledge of debt markets is required and the course would benefit IR practitioners wishing to develop their knowledge of debt IR and teams looking to build their debt IR activity.

What will I gain?

- A sound understanding of debt investor base and capital structure
- The essentials of developing an effective debt IR programme
- A review of best practice disclosures and presentations
- A firm grasp of the role of rating agencies and their interactions with companies
- An action plan that can immediately be implemented in the workplace

"Very good, concise, to the point and backed by real life examples and IR applications. Thoroughly enjoyed it."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

ESG/SRI: Sustainability issues for IR

Aim

This half-day course will ensure that participants gain a better understanding of the key sustainability issues, current and future trends and how to successfully identify and engage with key stakeholders. It is highly relevant for those wishing to develop an effective SRI programme and to coordinate IR & CR communications. You will also learn how to respond to the growing interest of institutional investors in the sustainability performance and corporate governance practices of quoted companies.

What will I gain?

- A comprehensive understanding of SRI issues
- An in-depth review of current and future sustainability trends
- Valuable insight into shaping messages to stakeholders
- Advice on developing an SRI roadshow

"Course was very informative and smooth running; the provided materials will be very useful to help implement best practice in my own company."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Strategic approach to corporate messaging: Convergence of IR and Financial PR

Aim

This interactive course looks at how Financial PR has evolved from being task-focused on financial results or soliciting press coverage to being integral to the corporate positioning with the capital markets. You will hear from experienced PR professionals together with former journalists and in-house IROs with practical advice as to how to develop a more strategic approach to messaging to a wider audience. It will also look at the challenges of putting a strategic framework around social and digital media and how to keep strategic positioning in mind even in a crisis.

What will I gain?

- An insight into developing strategic messaging for a wide audience
- An understanding of the challenges involved in creating a strategic framework for social media
- Advice on how to better align the two disciplines

"Overall very good and left me with lots of things to consider and renewed enthusiasm! Whilst the presentation met the stated aim of the course, I found the interactive nature of the course particularly beneficial, with both the Q&A with the trainers and other IROs exceptionally useful."

Click here for more information

Duration	1/2 day
CPD	20 CPD points

Advanced IR

Should we be afraid or not? Hedge Funds and Sovereign Wealth Funds

This half-day course is designed to offer an overview of how both hedge funds and Sovereign Wealth Funds operate in today's global financial market place. It will offer an insight into the thinking behind some of the investor behaviour which has attracted much comment in the financial press – not all of it well informed.

What will I gain?

- An understanding of why are they called hedge funds if they are not 'hedged'?
- Insights into the mechanics of short selling and leverage
- An explanation of why pension funds are investing in them
- A clear understanding of their counterparty relationships
- Discussion of whether having a Sovereign Wealth Fund on your register is a good thing

"Very interesting and insightful course giving useful insights into the structure and strategies of hedge funds, from their perspective."

Check the website for updates

Duration	1/2 day
CPD	20 CPD points

Certificate in IR

What is the CIR®?
The Certificate in Investor Relations (CIR®) is an internationally recognised qualification for the investor relations profession.

The qualification allows successful candidates to demonstrate their knowledge of the financial and market environment, the regulatory and reporting requirements for listed companies and their sound understanding of the principles of investor relations, which will enable them to operate competently and safely.

Obtaining the Certificate in IR:

- Provides international recognition as a qualified IR practitioner
- Demonstrates competence and growing expertise
- Enhances career development

The CIR® is a self-study qualification based on the IR Society's comprehensive CIR® study guide. It is assessed by an examination comprising 60 multiple-choice questions, based on the topics set out in the syllabus.

Who should sit the CIR®?
It is suitable for anyone working in investor relations or related professions, or considering a move into investor relations, either in the UK or overseas.

CIR® exam cost

IR Society members	£499 + VAT
Non-members	£649 + VAT

How to register for the CIR®

1. Register here
2. Call us on +44 (0) 20 7379 1763
3. Send an email to janet.kelly@irs.org.uk

The International CIR® (ICIR)
We offer an international syllabus of the CIR® which captures the essential elements common to international markets.

The CIR® currently runs in the UK, Hong Kong, Indonesia, Latin America, Malaysia, the Middle East (CIRO), Russia and Singapore.

If you are not sure which qualification is right for you, please contact janet.kelly@irs.org.uk

Over **1,300** successful candidates so far

Candidates from more than **26** countries

245 candidates registered in 2017

"It was my initiative to apply for this course, and I hope that the knowledge I received will be useful to my employer. I partly financed my study, so I was motivated to study in the evenings and over the weekends. I spent half of my two-week holiday going through the study guide over and over again, and I passed my mock exam three times, the score going up each time, giving me more confidence. All in all, preparation for my study took 80 hours.

It was very useful to attend all the courses that the CIR® programme entailed, in particular 'Demystifying company accounts' helped me to refresh the accounting and finance knowledge needed for the basics of the IR profession and for passing the exam. The course regulatory issues was very useful in understanding the EU and UK regulatory requirements and grasping the IPO process. The timing of the courses has been extremely well-chosen – there was slightly more than a month between them, and the revision course helped to consolidate the knowledge and to highlight the areas requiring special attention.

It was very useful to attend all the courses and to make helpful connections which I am sure will grow into cooperation in the future!"

Volodymyr Gaidash
Head of Communications, UkrGasVydobuvannya (UGV)

Diploma in IR

What is the DipIR®?

The Diploma in Investor Relations (DipIR®) is the new senior level qualification from the IR Society. Developed by expert IR practitioners and educational organisations, the Diploma will equip delegates with the skills, tools and expertise they need to become leaders in our profession.

Who should consider the Diploma?

Each candidate will be considered on their own merits. In general, however, it is expected that Diploma candidates will be members of the IR Society, will have successfully completed the IR Society's Certificate in Investor Relations (CIR®) qualification and will have a minimum of five years' experience in IR or a related profession.

What is the process?

Candidates will complete an application form and if successful they will be registered for the next available intake. We aim to run two Diploma programmes each year.

How is it examined?

Diploma candidates will be examined on three modules and attend two compulsory half-day courses:

Modules:

- Principles of IR Module
- IR in Practice Module
- Presentation Module

Half-day courses:

- Ethics Course
- Revision Course

Candidates will sit two three-hour exams which will assess their skills, knowledge and experience across all the compulsory topics and at least three of the optional topics shown in the syllabus. The exams will also assess familiarity with the UK's legislative and regulatory environment and corporate governance standards, and detailed knowledge of best practice IR and how it adds value. Candidates will also be expected to demonstrate their ability to communicate clearly in writing, identifying and justifying their key messages, their management and leadership potential and their understanding of their company and industry.

The Presentation Module, where candidates will make a formal 15 minute presentation with Q&A, is designed to test the candidates' competency in some of the softer attributes required as they progress in their career, including gravitas, authority/presence, credibility, clear communication and presentation skills.

On successful completion of the qualification, candidates will receive a certificate and are entitled to put DipIR® after their name.

What does it cost?

The cost for the Diploma is £995 + VAT and this covers: Examination fees, two half-day training courses and support from an IR Society mentor.

Find out more

For more information or to request an **application form** please contact:

Janet Kelly
Head of Professional Development
janet.kelly@irs.org.uk

Left to right: Sue Scholes, former IR Society chair, Diploma pilot participants, Gary Davies and Tom Randell and IR Society chair David Lloyd-Seed

The IR Society's DELIVER programme

The DELIVER programme (Developing future leaders through investor relations) is aimed at high potential IROs who are seeking the next step up in their career.

This is a six-month activity-based modular programme in three parts, with other supporting activities and meetings throughout the programme.

DELIVER continues to offer unique exposure to captains of industry and other thought leaders. In addition, working with IRO peers means creating your own personal network to compare notes with during and after the programme.

- Module 1: Foundation course that covers core aspects of capital markets, the operating and regulatory environment
- Module 2: Skills course that focuses on key elements needed to manage the investment community, including corporate actions, activism and communication strategies
- Module 3: Leadership course featuring City and industry figures

Find out more
For more information or to register your interest, please contact:

John Gollifer
General Manager
john.gollifer@irs.org.uk

"The IR role is very diverse and the course suits this perfectly. The format of taking out a whole day gives space to think and the benefit is not just the topics being covered, but the ideas that are sparked from the combination of time to think and contribution from experts is invaluable. I also like that the course is spread over time as I get to properly digest the topics covered and implement some changes before moving onto the next one – covering too much at once would dilute the impact and make implementation more difficult. Candid interaction with other IR professionals is clearly a key to the course as well."

Rob Clifford
Investor Relations, BHP

Bespoke Training

The IR Society offers a comprehensive programme of training courses covering invetor relations techniques, issues and best practice for IR practitioners at any stage in their careers. We can also tailor our course content to create a bespoke course to meet your exact needs and deliver it at any time and place to suit you.

Whether you have several new IR team members, junior executives/consultants working for a supplier or a group of IR directors looking to refresh and reignite their investor relations activity, we can develop an entirely unique course, utilising content and materials that are most relevant to your particular needs. Based on your training brief, we can ensure that in either a full or half-day, course delegates leave with a solid understanding of their chosen core area of focus, be it regulation and compliance, or industry best practice.

"We have had several IR Society courses delivered in house over the last few years. Working with the IR Society and their experienced trainers, programmes are tailored to our specific needs, aligned to our values and add immediate value. Training is delivered in a dynamic, engaging and fun-filled way. Without hesitation, the IR Society is our go-to provider for specialist investor relations training and development."

Tailored solution
Save money by having one of our existing courses delivered in-house for your team.

This approach offers many benefits, including

- Saving money
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Find out more
To discuss the options or request a quote:

Janet Kelly
Head of Professional Development
janet.kelly@irs.org.uk

Course Trainers

Our speakers are experts in their field and bring a wealth of practical experience to each of our courses. The Society works with them closely throughout the year to ensure the course content is regularly updated and refreshed.

Diane Faulks
Diane Faulks, who joined the Investor Relations Society in 1994 and served as Chairman of the Society from 2003-2005, has over 25 years' experience in Investor Relations having held in-house roles for various UK corporates and advisory roles with Citi Depositary Receipt Services, Cantos and Thomson.

Jon Harris
Jon is a chartered management accountant, a qualified business psychologist and a qualified teacher of adults. A graduate of Cambridge University, he teaches and coaches widely in professional services. He is an Associate Tutor at Goldsmiths University where he teaches management at BA and MA level. His blend of media, communications, accountancy and business psychology backgrounds makes him ideally and uniquely suited to help businesses in their development of all managers and finance staff in particular.

Deborah Morton-Dare
Deborah, who qualified as a Chartered Accountant with Arthur Young, specialises in financial training for all levels from beginners to advanced. She presents a comprehensive range of courses to a diverse range of corporate clients and financial institutions and specialises in making complex technical subjects comprehensible.

Lorraine Rees
Lorraine established IR-connect as a new investor relations consultancy in 2015. Prior to that she had been IR Director at Standard Life plc, Head of IR at The Phoenix Group, and an equity analyst at Exane BNP Paribas. She originally trained as a chartered accountant, and has also worked in strategy, corporate finance and banking.

Mike Tyrrell
Mike has been an SRI Analyst for the past 18 years, initially at Jupiter Asset Management and then at HSBC Global Equities where he established the first SRI research on the 'sell-side' and, most recently, at Citi Investment Research. Mike is currently Editor at SRI-CONNECT and brings a wealth of knowledge and experience to the Society's advanced IR ESG/Sustainability course, introduced in 2016.

Paul Meadows
Paul has fifteen years hands-on experience (Trader, Research Head & Portfolio Manager) from the Buyside of the markets (both Institutional and High Net Worth Private Client). Having undertaken the early due diligence meetings with Hedge Funds from a prospective investor viewpoint in the past, Paul now also has the experience of designing and delivering training programs for both Hedge Funds and Sovereign Wealth Funds as clients around the world today.

Geoffrey Collyer
As a leading leisure sector analyst, Geof has charted, analysed and in some cases helped to reshape several leisure industries, and his extensive experience makes Geof perfectly placed to assess the corporate strategies of the good, the bad and the ugly that make up the constituents of the public and private markets. Geof has 38 years combined industry and investment banking experience and has spent the last 30 years in a Top 3 rated sector equity research team, working for Wood McKenzie, NatWest Markets, Banker's Trust and Deutsche Bank.

Sallie Pilot
Since joining Black Sun over 20 years ago, Sallie has been providing strategic corporate communications consultancy for a wide range of UK and international clients. Sallie is an IR Society Board member and has been Chair of the IR Society Best Practice Committee since 2014. Sallie is a member of the Financial Reporting Lab steering group, and is a recognised commentator in corporate reporting, responsible for publishing a wide range of industry recognised research reports.

John Gollifer
John brings extensive international IR experience to his role as a director and General Manager of the IR Society. John has a BA from Loughborough University, an MBA from Henley Business School and he created and taught an IR course at the Singapore Management University from 2009 to 2012. As part of his role at the IR Society, John conducts IR training both in the UK and overseas.

Reg Hoare
Reg is a Managing Director of MHP, a leading Financial PR and IR consultancy. Reg joined Hogarth in 2010 (Hogarth becoming part of MHP), having previously worked for Smithfield and Weber Shandwick and its predecessor business Ludgate Communications. Between 1983 and 1995 Reg was a stockbroker with W Greenwell, SG Warburg Securities and Nomura International. He has been a member of the Investor Relations Society for many years, sitting on both its membership and events committees and is currently Chairman of the new Corporate Affairs Committee. Reg has an honours degree in Politics from the University of Bristol.

Click here for full biographies

Terms and conditions

Confirmation
Confirmation that your registration has been received will be sent by email.

Payment
Payment terms are 30 days from invoicing, unless the date of the event falls before 30 days, in which case the invoice needs to be settled before attendance. We regret we cannot accept attendees on the course if full payment has not been received. Joining instructions will be sent by email approximately two weeks prior to the course.

Transfers
If you wish to transfer your registration more than 14 days in advance to a later course/module date, an administration charge of £50 + VAT per course/module will apply. If you wish to make a transfer within 14 days of the course/module date an administration charge of 50% of the course/module cost will apply.

Substitute delegates
Should you wish to send an alternative delegate please contact Sophie on sophie.bennion@irs.org.uk as additional charges may apply.

Course attendance cancellations
Should you wish to cancel your registrations more than 14 days in advance, an administration charge of £50 + VAT per course/module will apply. Should you wish to cancel your registrations within 14 days of the attendance date, an administration charge of 100% of the course/module costs will apply.

Course dates, venues and postponement
The IR Society reserves the right to alter course dates or venues without liability. We will endeavour to give delegates as much notice as possible of these changes. If you are not able to attend the revised date or venue we will give a credit of 100% of the course costs against a future course or refund any course fees already paid.

Course cancellations by the IR Society
Occasionally it will be necessary to cancel a course if minimum numbers cannot be achieved. If you are not able to attend the revised date or venue we will give a credit of 100% of the course costs against a future course or refund any course fees already paid. As a course may be cancelled up to two weeks prior to its start date we recommend that delegates do not make travel arrangements before this time. Any travel costs incurred are entirely the delegate's responsibility.
The IR Society does not accept any liability for re-imbursement of travel costs.

Disclaimer
We are always working to make our courses as topical and relevant as possible and therefore the IR Society reserves the right to alter content of courses and/or the course tutor due to circumstances beyond its control.

The IR Society

The Investor Relations Society (IR Society) is a membership organisation, run by IR professionals for IR professionals, that exists to promote best practice in investor relations and to support the professional development of our members.

We have more than 800 members, including listed companies of all sizes, advisers and service providers; membership is open to anyone working in IR or a related profession, seeking to do so, or with an interest in investor relations more generally.

92% of members would recommend membership to a friend or colleague*

800+
MEMBERS

Made up of **50%** IROs and **50%** Service Providers and Advisers

Founded in 1980

* Source: IR Society membership survey 2017

Become a member

IR Society membership will help you to:

Stay informed

- Keep up to date with the latest developments in the sector through our website, online knowledge bank, quarterly journal and regular newsletters, as well as our annual conference and ongoing programme of topical events.

Develop your career

- Receive discounts on our range of excellent professional development courses and our globally-recognised investor relations qualifications – the Certificate in Investor Relations (CIR) and the Diploma in Investor Relations (DipIR)

Build your network

- Enhance your career prospects and build your professional network through networking with peers at our wide range of educational and less formal events

Joining is easy and we have a range of membership opportunities for individuals and companies – full details can be found on the website.

If you have any questions or would like more information, please contact:

Robert Dann
Head of Membership & Marketing
robert.dann@irs.org.uk
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