ir society

Professional Development Programme

2019

Sponsored by Deutsche Bank's Depositary Receipts group

Programme Overview

Professional development is a cornerstone of the IR Society's offering for members and non-members alike. It comprises a suite of courses and qualifications for IR professionals at every stage of their career.

Our courses will ensure that you have the tools, techniques and knowledge to perform your role as effectively as possible. These courses also provide the essential building blocks necessary to undertake globally-recognised qualifications which provide endorsements of your skills, competencies and capabilities.

Core courses

Core courses cover a broad range of topics which provide an excellent introduction to IR or allow IR practitioners to develop their knowledge and best practice in essential areas such as investor targeting, regulation and the annual reporting cycle.

Courses include:

- 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 regulation and compliance essentials
- Demystifying company accounts and valuations
- Annual reporting: Best practice in practice
- IR script writing for management presentations
- Energise your investor targeting
- Avoiding ethical pitfalls in IR

Advanced courses

Advanced courses are targeted at the more experienced professional who is looking to enhance their understanding in more strategic or technical areas as well as learning from peer group discussions.

Courses include:

- IR regulation update
- Advanced writing skills for IR
- ESG/SRI: Sustainability issues for IR
- Strategic approach to corporate messaging
- Alternative investors: Hedge funds and sovereign wealth funds
- IRO engagement with the Board
- Leadership - coming soon

Bespoke courses

With a broad pool of experienced speakers available, the IR Society can tailor courses to the specific requirements of any client, with courses taking place either at our London headquarters or at any location whether in the UK or internationally.

Deutsche Bank's Depositary Receipts group is pleased to sponsor The Investor Relations Society's 2019 Professional Development Programme

Specialist courses

Specialist courses are offered at both core and advanced level and cover in depth topics such as financial modeling and debt IR, or target particular audiences to enable highly relevant peer group discussion.

Courses include:

- IR for personal and executive assistants
- Introduction to PR
- Financial modelling
- Building your debt IR capability

The IR Society also has arrangements with sister organisations to provide access at members rates to courses comprising:

- Company Secretarial
- Crisis management
- Treasury

Qualifications

Certificate in IR (CIR®)
The CIR is the foundation IR Society qualification which has become the benchmark for the industry, widely recognised in the UK and in other international markets. The qualification ensures a broad understanding of the key elements of the IR industry and the financial markets in which it operates.

The CIR is a comprehensive test of competency in IR and a must-have qualification for working at an increasing number of companies active in the sector.

Diploma in IR (DipIR®)
The Diploma (DipIR) is the new senior level qualification from the IR Society. Developed by expert practitioners and educational organisations, the Diploma examines candidates on key aspects of the IR profession - with written exams on both principles and practical aspects.

Both IR Society and third party courses, together with a compulsory programme covering ethics and revision topics, provide candidates with the tools necessary to pass what is a challenging qualification.

DELIVER programme (DEveloping future Leaders through InVEstor Relations) is a senior IRO programme designed for high potential IROs who are seeking to explore key strategic elements necessary for the next stage in their careers.

With unrivalled participation from industry experts, influential C-suite and senior IROs, the programme offers thought provoking debate through three full-day modules (covering market, IR skill set and leadership themes) and a number of evening seminars where speakers and delegates share their experiences and address key issues in round table formats. DELIVER is run biannually.

Core courses

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 regulation and compliance essentials
C1 - Full day	**C2 - Half day**	**C3 - Half day**	**C4 - Full day**	**C5 - 2 Full days**
Course focus: • 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	**Course focus:** • 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	**Course focus:** • In-depth insight into the workings of city advisers • Advice on how best to build stronger relationships with these key stakeholders	**Course focus:** • 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	**Course focus:** **Module One** • 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 **Module Two** • 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

"Excellent course! Really enjoyed the informal, conversational style. Definitely useful for future work."

Best practice in IR

"Really useful training. Interesting topics and some clear explanations delivered by an excellent and very engaging trainer."

Introduction to IR and the financial markets

Demystifying company accounts and valuations

C6 - 2 Full days

Course focus:

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

Annual reporting: Best practice in practice

C7 - Half day

Course focus:

- 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

IR script writing for management presentations

C7 - Half day

Course focus:

- 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 teams are presented at their best
- Learn techniques for writing quickly as well as effectively

Energise your investor targeting

C8 - Half day

Course focus:

- 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

Avoiding ethical pitfalls in IR

C10 - Half day

Course focus:

- Understand the difference between legal/regulatory vs other 'softer' issues
- Explore how internal and external dynamics may affect or generate potential ethical dilemmas
- Identify common situations that arise in IR which may raise ethical issues
- Help develop a toolkit to approach potential issues and assess their implications
- Understand when to reach out to advisers or other internal departments

"This course exceeded my expectations – not only was it highly informative, it was highly enjoyable."

Demystifying company accounts and valuations

"Very helpful and insightful – a lot of useful content and discussions…would highly recommend!"

IR script writing for management presentations

Advanced courses

IR regulation update
A1 - Half day

Course focus:
- 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

Advanced writing skills for IR
A2 - Half day

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

ESG/SRI: Sustainability issues for IR
A3 - Half day

Course focus:
- 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

Strategic approach to corporate messaging (IR and Financial PR)
A4 - Half day

Course focus:
- 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

Alternative investors: Hedge funds and sovereign wealth funds
A5 - Half day

Course focus:
- An understanding of hedge fund strategies
- Insights into the mechanics of short selling and leverage
- An explanation of why pension funds are investing in them
- A clear understanding of their counter-party relationships
- Benefits of having Sovereign Wealth Funds on your register

IRO engagement with the Board
A6 - Half day

Course focus:
- Define what a PLC board needs from its IR team
- Explore what marks out a best-of-class IRO/ Board dynamic
- Identify gaps in experience and relationships which may be a current barrier to developing a role as a trusted adviser
- Understand the key stakeholders in and around the Board; how this defines the agenda
- Identify the key activities an IRO should seek to be involved in

"A very clear and well structured course… I would definitely recommend this course to all IROs."

IR regulation update

"Course was very informative...very useful to help implement best practice in my own company."

ESG/SRI: Sustainability issues for IR

Specialist courses

IR for personal and executive assistants

SC1 - Full day

Course focus:

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

Introduction to PR

SC2 - Half day

Course focus:

- 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

Financial modelling

SA1 - Full day

Course focus:

- 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

Building your debt IR capability

SA2 - Half day

Course focus:

- 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

Affiliated Society Courses

The IR Society has built relationships with other professional bodies covering disciplines such as Company Secretarial, Treasury and PR. We have agreements in place which provide IR Society members with access to certain identified courses at members' rates. For further information please contact the IR society executive team.

Bespoke courses

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 the chosen core area of focus, be it regulation and compliance, or industry best practice.

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
- Designing and delivering around the needs of your organisation
- Delivering at a date, time and location of your choice

"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 were tailored to our specific needs, aligned to our values and added immediate value."

Certificate in Investor Relations

What is the CIR®?

The Certificate in Investor Relations (CIR) and International Certificate in IR (ICIR) are internationally recognised qualifications for the investor relations profession. With more than 1,400 successful candidates from more than 26 countries, the Certificate is firmly established as the leading IR qualification worldwide.

The CIR and ICIR is a valuable qualification for those already in the profession and becoming an essential prerequisite for those seeking to work in investor relations. It is a comprehensive, stretching test of your competency in IR, providing the core knowledge and tools to help you develop your career in the 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 within a changing regulatory regime.

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.

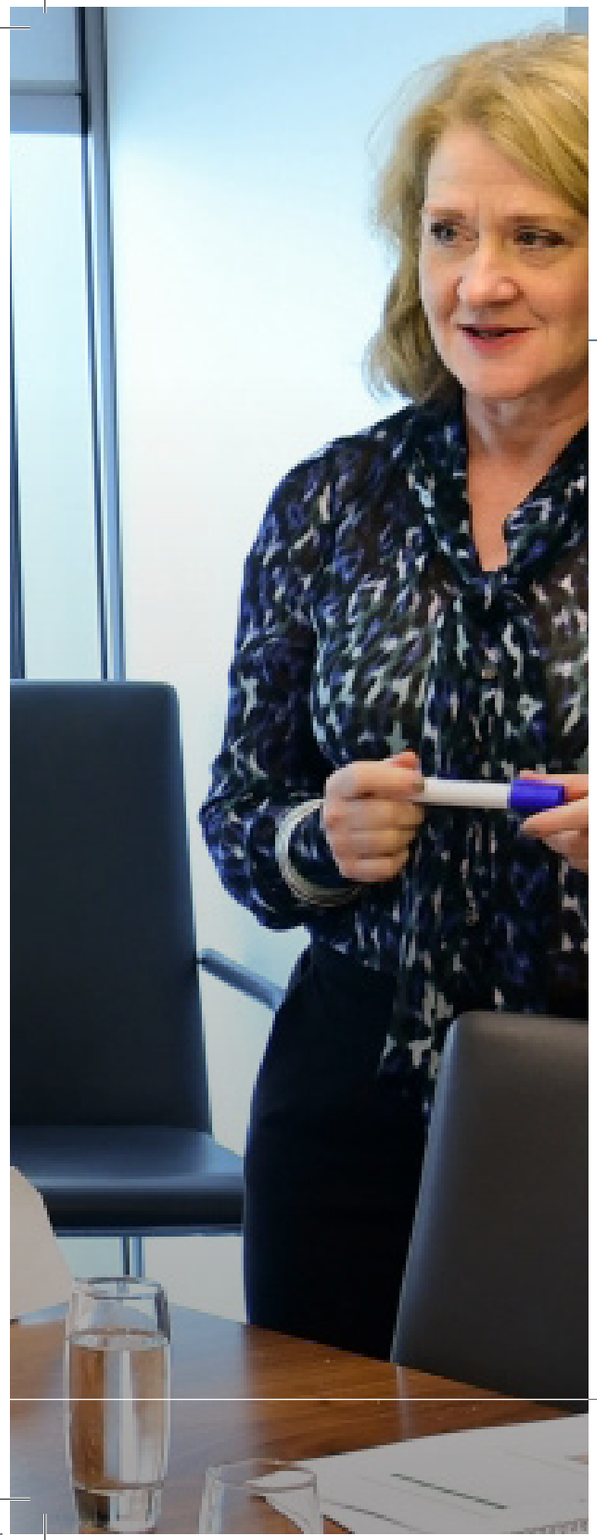
Course programme

The certificate is a self-study qualification based on the IR Society's comprehensive study guide. It is assessed by an examination comprising 60 multiple-choice questions, based on the topics set out in the syllabus. Candidates are encouraged to attend the society's regulatory and compliance courses which provide significant support and learning for the examination.

The International Certificate in IR (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), Nigeria, Russia, Singapore and Sri Lanka.

"The recognition provided by the qualification has given me more confidence when advising our clients on best practice communications."



Diploma in Investor Relations

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 application process?

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

Course programme

The programme is designed for a mix of self-study and attendance at IR Society courses. Diploma candidates will also attend two compulsory half-day course covering ethics and revision topics and also are expected to be very familiar with the topics covered in the CIR and regulatory courses.

How is it examined?

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 along 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 and credibility, along with 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.

"It's a safe environment to talk about real issues with your peers… it's invaluable to discuss how to handle the big IR challenges before you find yourself dealing with one of them."

For the latest course details please **visit irsociety.org.uk**

DELIVER programme

DELIVER (DEveloping future Leaders through InVEstor Relations) is a senior IRO programme designed for high potential IROs who are seeking to explore key strategic elements necessary for the next stage in their careers.

With unrivalled participation from industry experts, influential C-suite and senior IROs, the programme offers thought provoking debate through three full-day modules and speakers and delegates share their experiences and address key issues in round table formats.

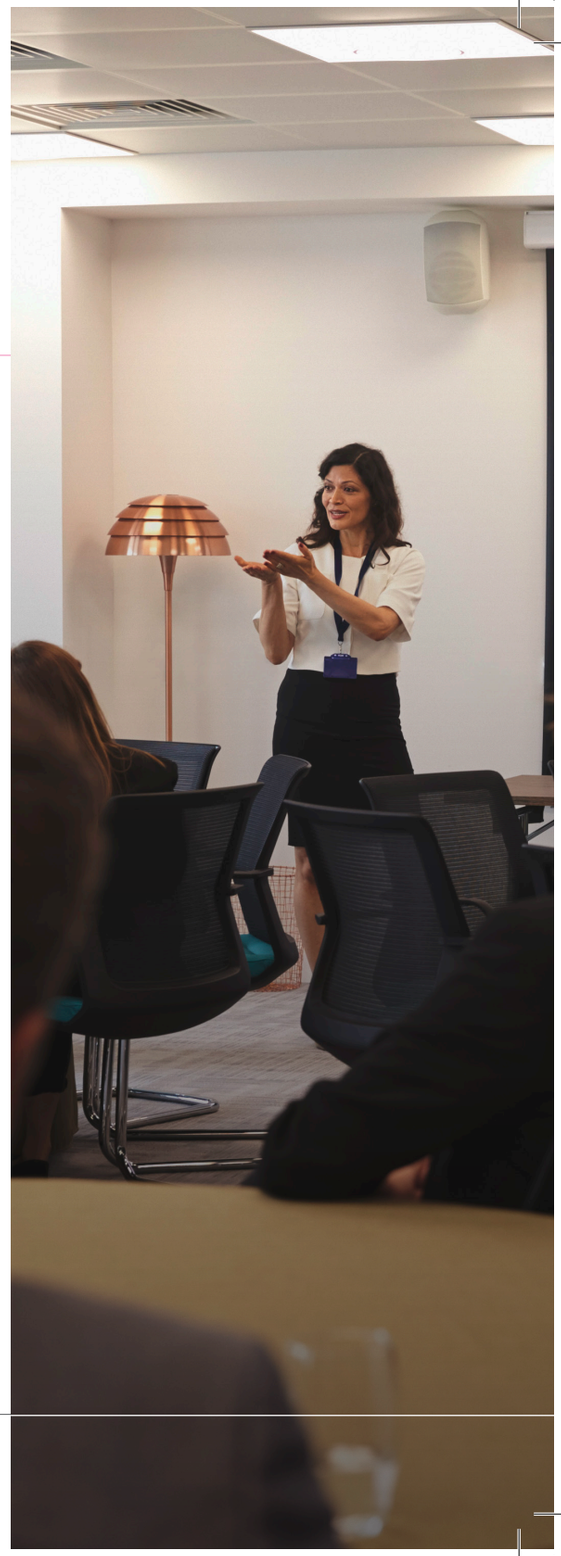
DELIVER continues to offer unique exposure to captains of industry and other thought leaders. In addition, working with IRO peers means creating your own personal network to compare notes with during and after the programme.

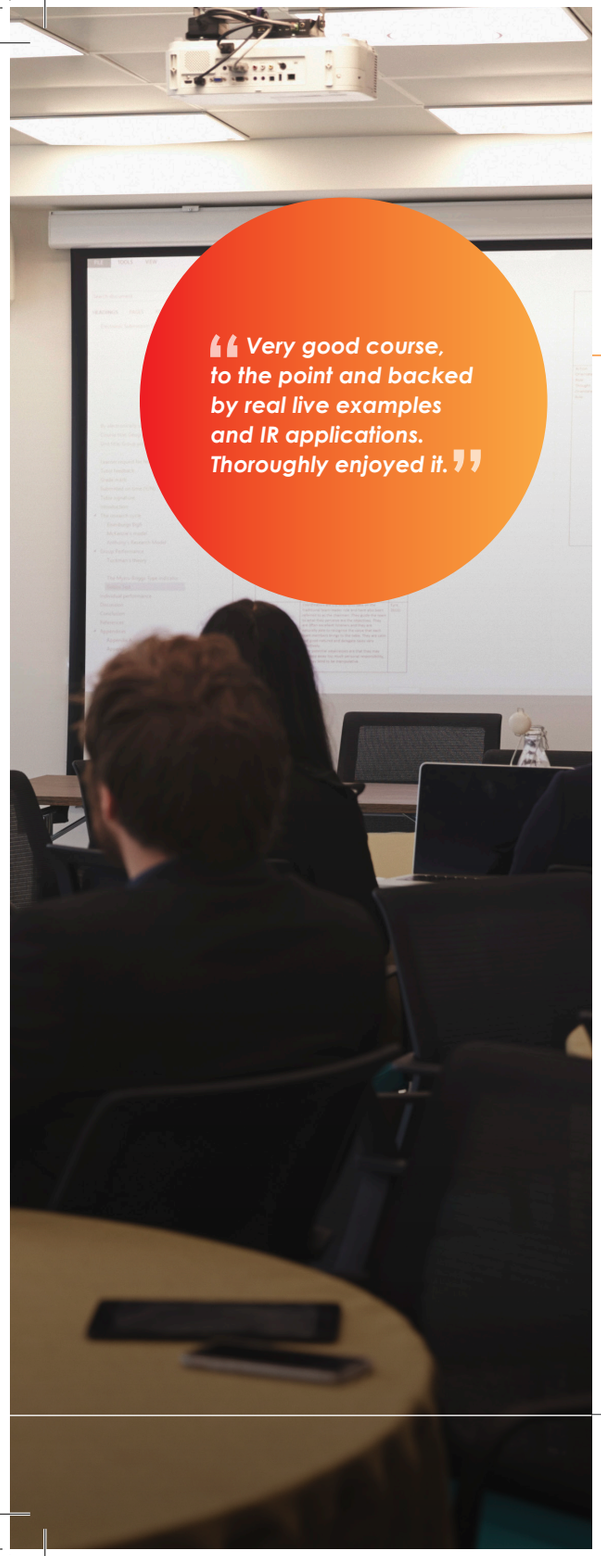
- **Module 1:** Foundation course that covers core aspects of capital markets, the operating and regulatory environment
- **Module 2:** Skills course that focuses on key elements needed to manage the investment community, including corporate actions, activism and communication strategies
- **Module 3:**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

On previous DELIVER programmes, evening seminars have included conversations with FTSE20 chairmen, an activism panel discussion, and defence scenario planning, as well as a number of social networking events.

DELIVER is scheduled to run in 2019.

"The DELIVER programme was a fantastic experience with thought provoking content and unique access to senior industry and City figures. It provided a great opportunity to discuss important issues – both market and career related – and build a peer network which has been very useful over the past 6 years. I would recommend it highly."





“Very good course, to the point and backed by real live examples and IR applications. Thoroughly enjoyed it.”

Course trainers

Our course trainers 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.

Current course trainers include two former Chairs of the IR Society, senior IROs, fund managers, equity analysts and professional financial trainers. Many courses also have guest speakers who are practitioners in areas specifically relevant to the topic being covered, who can provide insights into the day-to-day experiences and implications for an IRO of the course topic.

“Overall very good and left me with lots of things to consider and renewed enthusiasm.”

Course costs

Courses are priced to reflect both course duration and level:

Core Courses			
Full-day courses		**Half-day courses**	
IR Society Members	£449 + VAT	IR Society Members	£339 + VAT
Non-members	£599 + VAT	Non-members	£469 + VAT
Advanced courses			
Full-day courses		**Half-day courses**	
IR Society Members	£549 + VAT	IR Society Members	£389 + VAT
Non-members	£699 + VAT	Non-members	£519 + VAT
Specialist courses			
Full-day SC courses		**Half-day SC courses**	
IR Society Members	£449 + VAT	IR Society Members	£339 + VAT
Non-members	£599 + VAT	Non-members	£469 + VAT
Full-day SA courses		**Half-day SA courses**	
IR Society Members	£549 + VAT	IR Society Members	£389 + VAT
Non-members	£699 + VAT	Non-members	£519 + VAT

You can benefit from significant savings on professional development courses and qualifications by becoming a member of the Society.

Savings can also be made from multiple registrations. In addition, receive a 10% discount when booking two courses and 20% when booking three or more courses.

Course bookings and further information

Please contact Tara Hogg, Professional Development Executive at the IR Society

Telephone: **+44 (0) 20 7379 1763**
Email: **tara.hogg@irsociety.org.uk**

About IR and the IR Society

Investor Relations
Investor Relations is the communication of information and insight between a company and the investment community. This process enables a full appreciation of the company's business activities, strategy and prospects and allows the market to make an informed judgement about the fair value and appropriate ownership of a company.

Investor Relations 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.

Mission statement
The Investor Relations Society's mission is to promote best practice in investor relations; to support the professional development of its members; to represent their views to regulatory bodies, the investment community and government; and to act as a forum for issuers and the investment community.

Our vision
To be the focal point in the UK for investor relations practice and IR professionals and to promote best practice in investor relations generally.

ir society

www.irsociety.org.uk