

## COURSE OVERVIEW TM0038

### Professional Certificate in Investor Engagement & Shareholder Relations

#### Course Title

Professional Certificate in Investor Engagement & Shareholder Relations

#### Course Date/Venue

Please refer to page 3

#### Course Reference

TM0038

#### Course Duration/Credits

Five days/3.0 CEUs/30 PDHs



#### Course Description



***This practical and highly-interactive course includes real-life case studies and exercises where participants will be engaged in a series of interactive small groups and class workshops.***

This course is designed to provide participants with a comprehensive overview of Investor Engagement and Shareholder Relations. It covers the role of investor engagement and shareholder; the types of shareholders, shareholder needs, expectations and shareholder activism; the investor engagement strategies, plan, and effective communication strategy; the investor relations management; the role of investor relations, and regulatory requirements; the financial reports, press releases and investor meetings; the investor relations tools and technology; and using social media and other digital tools to engage investors.



During this interactive course, participants will learn the shareholder engagement strategies, transparency and accountability; the shareholder communication, meetings, effective proxy statements and shareholder proposals; the shareholder voting and proxy solicitation process and strategy; the role of proxy advisors; the corporate governance and board of directors; the corporate social responsibility; the environmental, social, and governance (ESG) issues and strategy; the financial analysis and valuation; the effective communication plan and managing shareholder concerns during mergers and acquisitions; the crisis management and investor relations strategies for international markets; and the role of investor relations in capital markets.



### **Course Objective**

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on investor engagement and shareholder relations
- Identify the role of investor engagement and shareholder relations in corporate governance including the types of shareholders, shareholder needs and expectations and shareholder activism
- Carryout investor engagement strategies, develop an investor engagement plan, identify key stakeholders and create an effective communication strategy
- Employ investor relations management, identify the role of investor relations, create an effective investor relations program and discuss regulatory requirements
- Develop a corporate message, prepare financial reports and press releases and manage analyst and investor meetings
- Recognize investor relations tools and technology, and use social media and other digital tools to engage investors
- Apply shareholder engagement strategies, develop a shareholder engagement plan, identify the importance of transparency and accountability and manage shareholder inquiries and concerns
- Apply shareholder communication, prepare shareholder meetings, create effective proxy statements and manage shareholder proposals
- Carryout the shareholder voting and proxy solicitation process, develop a proxy solicitation strategy, and identify the role of proxy advisors
- Recognize corporate governance and the board of directors as well as manage shareholder proposals related to corporate governance
- Develop an effective corporate social responsibility program and communicate corporate social responsibility initiatives to stakeholders
- Discuss the importance of environmental, social, and governance (ESG) issues, develop an ESG strategy and communicate ESG initiatives to investors and other stakeholders
- Illustrate financial analysis and valuation, review financial statements, and use financial analysis to communicate with investors
- Develop an effective communication plan and manage shareholder concerns during mergers and acquisitions
- Carryout crisis management and communications, develop crisis management plan and manage crisis communication with investors and other stakeholders
- Recognize the differences in investor relations across countries, adapt investor relations strategies for international markets and manage cross-border shareholder communication
- Identify the role of investor relations in capital markets, manage the relationship with investment banks and analysts and communicate with the financial press
- Manage the challenges of investor relations in a public and private company, develop effective communication strategies, manage the relationship with the stock exchange and regulators and prepare an eventual IPO

### **Exclusive Smart Training Kit - H-STK®**



Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.

### **Who Should Attend**

This course provides a complete and up-to-date overview of investor engagement and shareholder relations for those who work in or are interested in working in the following areas investor relations, shareholder relations, corporate communication, public relations, finance, corporate governance and legal and regulatory compliance.

### **Course Date/Venue**

Session(s)	Date	Venue
1	July 07-11, 2025	Hampstead Meeting Room, London Marriott Hotel Regents Park, London, UK
2	September 07-11, 2025	Tamra Meeting Room, Al Bandar Rotana Creek, Dubai, UAE
3	November 10-14, 2025	TBA Meeting Room, JW Marriott Hotel Madrid, Madrid, Spain
4	January 12-16, 2026	TBA Meeting Room, Grand Hyatt Athens, Athens, Greece

### **Course Fee**

Greece	<b>US\$ 8,800</b> per Delegate + <b>VAT</b> . This rate includes Participants Pack (Folder, Manual, Hand-outs, etc.), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.
Madrid	<b>US\$ 8,800</b> per Delegate + <b>VAT</b> . This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.
London	<b>US\$ 8,800</b> per Delegate + <b>VAT</b> . This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day
Dubai	<b>US\$ 5,500</b> per Delegate + <b>VAT</b> . This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

### **Accommodation**

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.



### Course Certificate(s)

- (1) Internationally recognized Wall Competency Certificates and Plastic Wallet Card Certificates will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Certificates are valid for 5 years.

**Recertification is FOC for a Lifetime.**

### Sample of Certificates

The following are samples of the certificates that will be awarded to course participants:-





- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course

\* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \*

 **Haward Technology Middle East**  
Continuing Professional Development (HTME-CPD)

**CEUs**

**CEU Official Transcript of Records**

**TOR Issuance Date:** 14-Nov-22  
**HTME No.** 74851  
**Participant Name:** Waleed Al Habeeb

Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
TM0038	Professional Certificate in Investor Engagement & Shareholder Relations	November 10-14, 2022	30	3.0

Total No. of CEU's Earned as of TOR Issuance Date **3.0**

**TRUE COPY**  
  
Jaryl Castillo  
Academic Director

Haward Technology has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Hemdon, VA 20171, USA. In obtaining this approval, Haward Technology has demonstrated that it complies with the ANSI/IACET 1-2013 Standard which is widely recognized as the standard of good practice internationally. As a result of their Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 1-2013 Standard.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking Continuing Education Units (CEUs) in accordance with the rules & regulations of the International Association for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology is accredited by

P.O. Box 26070, Abu Dhabi, United Arab Emirates | Tel.: +971 2 3091 714 | E-mail: info@haward.org | Website: www.haward.org

\* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \*

### **Course Certificate(s)**


Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

### **Certificate Accreditations**

Haward's Certificates are accredited by the following international accreditation organizations:

- 
British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. Haward's certificates are internationally recognized and accredited by the British Accreditation Council (BAC). BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.



### Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Mr. Mike Taylor**, PhD, MScLI, MBA, MBL, BSc, HDE, is a **Senior Management Consultant** with over **25 years** of extensive experience in the areas of **Major Gas & LNG, Gas & LNG Sales Contracts, Oil-Indexed Pricing, Data Quality Control, Basics of Natural Gas & LNG, Future of Gas & LNG Sales Contracts, Data Quality Assessment, Data Quality Planning, Data Quality Strategy Management, Data Modelling, Root Cause Analysis & Solution Development, Project Planning, Scheduling & Cost Control Professional, Project Scheduling & Cost Control, Facilitation & Leadership Skills, Coaching, Human Resource Development, Psychometric Testing, Career Development & Competency Succession Planning, Self-Development & Empowerment, Personal Learning Needs Identification, Critical Success Factors (CSFs), Key Performance Indicators (KPIs), Productivity Creativity & Thinking Modes, Human Resource Scorecard Management, Career Laddering, Fast Track Career Progression Application, Knowledge Management, Customer Management, Leadership Skills, Presentation Skills, Negotiation Skills, Decision Making Skills, Communication Skills, Emotional Intelligence, Performance Management, Contract Management, Quality Management, Commercial Strategy, Project Management, Risk Management, Leadership Business Management, Human Resource Management, Planning, Budgeting & Cost Control, Business Development, Innovation, Sales Strategy and Knowledge & Intangible Asset Assessment Design. Further, he is also well versed in **Organization Management & Business Consulting, Stakeholder & Supplier Evaluation, Data Collection & Information Gathering, Value & Supply Chain Management, Intellectual Property & Innovation Assessments, Logistics & Supply Chain Management, Budgeting & Cost Control and Marketing Management**. Mr. Taylor is the **Founder CEO** of Mitakon Innovation Pty Ltd wherein he is responsible for the development of Executives & Senior Managers specializing in innovation, knowledge management and commercial negotiation as well as authored, implemented and executed a global 21<sup>st</sup> century facilitation and leadership methodology.**

During his career life, Mr. Taylor has gained his practical and field experience through his various significant positions and dedication as the **Knowledge-Solutions Service Provider, Founder Principal/CIO, Subject Matter Expert, Consulting Partner, Executive/Management Development Facilitator, Multinational/Corporate Senior Management Consultant, Senior Quality Management Consultant, Executive Management Development/Facilitator, Business Consultant/Facilitator, Business & Quality Consultant/Coach, Client Director, Administrative Manager, Quality Manager, International Sales & Business Development Executive, Regional Sales Manager, National Key Accounts Manager, Commercial Sales & Marketing Consultant, Admin Assistant, Sales & Marketing Representative, Key Note Speaker, Lecturer and Instructor/Trainer** for various international companies such as the Highland Group (Business Consulting), **Anglo American, BHP Billiton, Rio Tinto, DI Management Solutions (BPO), Master Design Making Institute (MDMI), RMG/Contact Media & Communications, Paul Dinsdale Properties (PDF), Giant Leap Architects, Wise Capital Investments (HOD), Evolution® Advertising, Collaborative Xchange, Leatt Corporation, Dentsply SA, FMCG/Binzagr Company, Unilever, Kellogg's, BAT, Hershey's, CORO, Lilly Direct/Lennon Generics and Bausch & Lomb**.

Mr. Taylor has **Master** degrees in **Leadership & Innovation, Business Administration and Business Leadership** as well as a **Bachelor** degree in **Physical Education** and pursuing **PhD in Global Governance & Energy Policy**. Further, he is a **Certified Instructor/Trainer, Certified Internal Verifier/Trainer/Assessor** by the **Institute of Leadership & Management (ILM)** and a member of **Incremental Advantage, Da Vinci Institute, Black Management Forum, Institute of Directors (IOD), World Future Society (WFS), Social Science Research Network, University of Kwazulu Natal (Alumnus), Anthropology & Archaeology Research Network and National Research Foundation (NRF)**. He has further delivered numerous trainings, courses, workshops, seminars and conferences globally.

### **Training Methodology**

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

- 30% Lectures
- 20% Practical Workshops & Work Presentations
- 30% Hands-on Practical Exercises & Case Studies
- 20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

### **Course Program**

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

#### **Day 1**

0730 – 0800	<i>Registration &amp; Coffee</i>
0800 – 0815	<i>Welcome &amp; Introduction</i>
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b><i>Introduction to Investor Engagement &amp; Shareholder Relations</i></b> <i>Definition &amp; Importance of Investor Engagement &amp; Shareholder Relations • The Role of Investor Engagement &amp; Shareholder Relations in Corporate Governance</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b><i>Shareholders</i></b> <i>Types of Shareholders • Identifying Shareholder Needs &amp; Expectations • Shareholder Activism</i>
1100 – 1230	<b><i>Investor Engagement Strategies</i></b> <i>Developing an Investor Engagement Plan • Identifying Key Stakeholders • Creating an Effective Communication Strategy</i>
1230 – 1245	<i>Break</i>
1245 – 1330	<b><i>Investor Relations Management</i></b> <i>The Role of Investor Relations • Creating an Effective Investor Relations Program • Regulatory Requirements</i>
1420 – 1430	<b>Recap</b>
1430	<i>Lunch &amp; End of Day One</i>

#### **Day 2**

0730 – 0930	<b><i>Investor Relations Communication</i></b> <i>Developing a Corporate Message • Preparing Financial Reports &amp; Press Releases • Managing Analyst &amp; Investor Meetings</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b><i>Investor Relations Tools &amp; Technology</i></b> <i>Using Social Media &amp; Other Digital Tools to Engage Investors • Investor Relationship Management Software</i>
1100 – 1230	<b><i>Shareholder Engagement Strategies</i></b>





	<i>Developing a Shareholder Engagement Plan • The Importance of Transparency &amp; Accountability • Managing Shareholder Inquiries &amp; Concerns</i>
1230 – 1245	<i>Break</i>
1245 – 1345	<b>Shareholder Communication</b> <i>Preparing for Shareholder Meetings • Creating Effective Proxy Statements • Managing Shareholder Proposals</i>
1420 – 1430	<b>Recap</b>
1430	<i>Lunch &amp; End of Day Two</i>

### Day 3

0730 – 0930	<b>Shareholder Voting &amp; Proxy Solicitation</b> <i>The Proxy Voting Process • Developing a Proxy Solicitation Strategy • The Role of Proxy Advisors</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b>Corporate Governance</b> <i>The Board of Directors • Managing Shareholder Proposals Related to Corporate Governance</i>
1100 – 1230	<b>Ethics &amp; Corporate Social Responsibility</b> <i>Developing an Effective Corporate Social Responsibility Program • Communicating Corporate Social Responsibility Initiatives to Stakeholders</i>
1230 – 1245	<i>Break</i>
1245 – 1330	<b>Environmental, Social, And Governance (ESG) Issues</b> <i>The Importance of ESG Issues • Developing an ESG Strategy • Communicating ESG Initiatives to Investors &amp; Other Stakeholders</i>
1420 – 1430	<b>Recap</b>
1430	<i>Lunch &amp; End of Day Three</i>

### Day 4

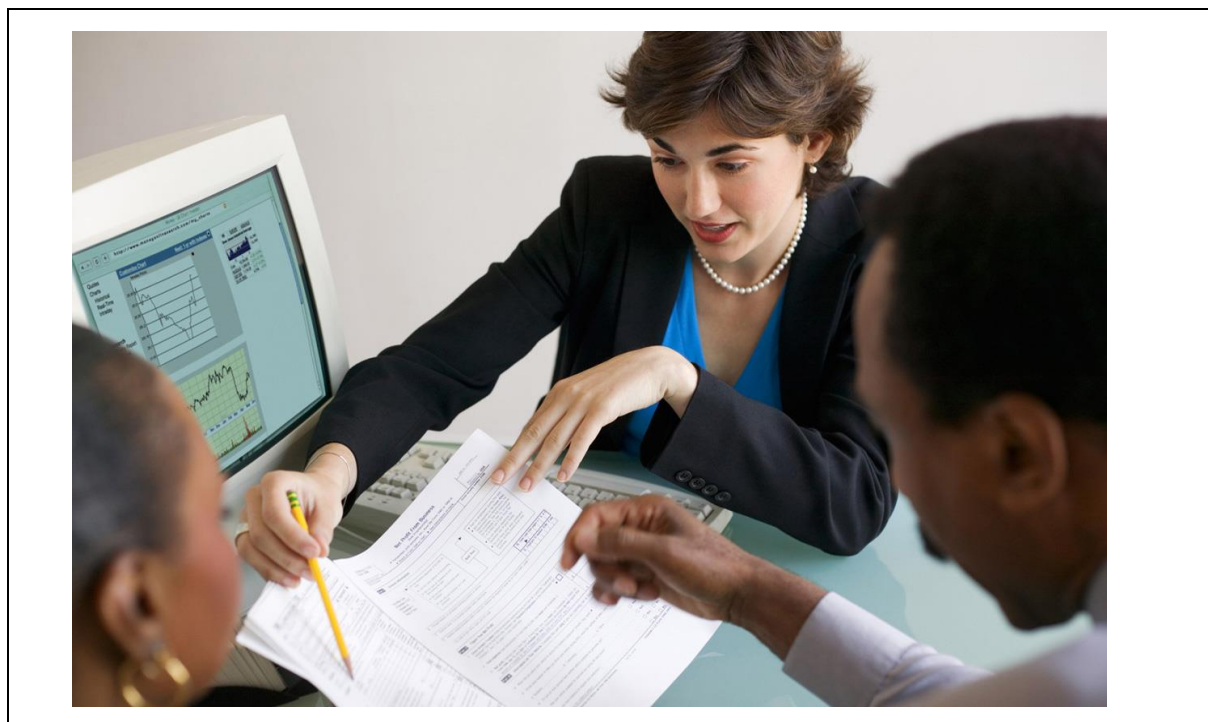
0730 – 0830	<b>Financial Analysis &amp; Valuation</b> <i>Financial Statements • Using Financial Analysis to Communicate with Investors</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b>Investor Relations During Mergers &amp; Acquisitions</b> <i>Developing an Effective Communication Plan • Managing Shareholder Concerns During Mergers &amp; Acquisitions</i>
1100 – 1230	<b>Crisis Management &amp; Communications</b> <i>Developing a Crisis Management Plan • Managing Crisis Communication with Investors &amp; Other Stakeholders</i>
1230 – 1245	<i>Break</i>
1245 – 1315	<b>International Investor Relations</b> <i>The Differences in Investor Relations Across Countries • Adapting Investor Relations Strategies for International Markets • Managing Cross-Border Shareholder Communication</i>
1420 – 1430	<b>Recap</b>
1430	<i>Lunch End of Day Four</i>

### Day 5

0730 – 0930	<b>Investor Relations &amp; Capital Markets</b> <i>The Role of Investor Relations in Capital Markets • Managing the Relationship with Investment Banks &amp; Analysts • Communicating with the Financial Press</i>
0930 – 0945	Break
0945 – 1130	<b>Managing Investor Relations in a Public Company</b> <i>The Challenges of Managing Investor Relations in a Public Company • Developing Effective Communication Strategies for a Public Company • Managing the Relationship with the Stock Exchange &amp; Regulators</i>
1130 – 1230	<b>Managing Investor Relations in a Private Company</b> <i>The Challenges of Managing Investor Relations in a Private Company • Developing Effective Communication Strategies for a Private Company • Preparing for an Eventual IPO</i>
1230 – 1245	Break
1245 – 1300	<b>Conclusion &amp; Final Project</b> <i>Review of Key Concepts &amp; Strategies Learned in the Course • Developing an Investor Engagement &amp; Shareholder Relations Plan for a Specific Company • Presenting the Plan</i>
1300 – 1315	<b>Course Conclusion</b>
1315 – 1415	<b>COMPETENCY EXAM</b>
1415 – 1430	Presentation of Course Certificates
1430	Lunch & End of course

### Practical Sessions

This practical and highly-interactive course includes real-life case studies and exercises:-



### Course Coordinator

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