

AGMs & Investor Days For Investment Funds

5 frequent mistakes
& how to avoid them

ACCELLENCE

AGMs & Investor Days

For investment funds



For GPs, there are a limited number of opportunities each year to make a significant impact, particularly in an increasingly challenging fundraising environment.

An AGM is a rare opportunity for GPs to host an event which engages and impresses LPs - both on the day and beyond.

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Fundraising never truly stops ... and we know that every interaction with LPs counts. AGMs are invaluable opportunities to engage LPs, convert prospects into clients, and lay a strong foundation for future vintages.

Having worked on major investment funds' AGMs for many years, we wanted to share some of the techniques we have developed over the years and common mistakes to avoid.

We hope you will enjoy the reading and look forward to reconnecting with you soon !



Romain Richemont
Managing Partner

Mistake #1

An AGM is not a reporting exercise

LPs have the figures.

They've seen the charts, read the reports and analysed the metrics. They don't attend AGMs for another round of numbers that they can easily read on their own.

Spending valuable time presenting data that they have already seen is **unlikely to trigger incremental interest – or enthusiasm for your next vintage.**

HOW TO AVOID IT

Your AGM is not just an event; it's a flagship marketing opportunity.

It's a chance to position your investment practice within the broader context of industry trends, geopolitical shifts and macro dynamics.

LPs seek insights that go beyond the obvious – **Give LPs perspectives which help them with their asset allocation decisions.**



Include thought leadership sessions to share your vision on asset class trends



Invite external industry experts to provide outside perspectives and add depth to discussions



Organise LP panels to foster dialogue and position the AGM as a strategic forum

Mistake #2

Turning your AGM into a monologue

Too many AGMs fall into the trap of becoming a broadcast — long, presentation-heavy agendas where LPs are expected to listen but not participate.

This passive format is one of the quickest ways to disengage your audience.

Without interaction, AGMs miss the chance to enable real conversations, surface questions, and strengthen alignment with LPs.

HOW TO AVOID IT

You AGM should be a dialogue.

You need to create an environment where LPs are encouraged to share their perspectives, ask questions and contribute to discussions. Engaging LPs actively throughout the event ensures they feel valued, involved, and motivated. **The more interactive and dynamic the format, the more impactful the event will be.**



Keep your presentations short to maintain energy and ensure every moment delivers value



Incorporate several Q&A sessions to ensure engagement and keep momentum



Include a master of ceremonies for seamless transitions and connect with the audience



Use live polling & interactive digital tools to energise the room and keep LPs engaged

Mistake #3

An AGM with no opportunities for LPs to connect with their peers

While the presentations are important, they are not the only reason LPs make the effort to attend in person.

AGMs can often be back-to-back sessions with little to no room for LP interactions. LPs appreciate the ability to have candid conversations with fellow investors, gain informal insights from GPs, and strengthen their networks. **If your event doesn't carve out dedicated time for meaningful informal discussions, you're missing an important part of its purpose.**

HOW TO AVOID IT

Make sure that your AGM is also about people.

LPs value these events as a forum to exchange unfiltered perspectives and expand their networks. These gatherings — whether over a coffee break or a networking lunch — **are often as impactful as what happens on stage.**



Incorporate several networking opportunities such as coffee breaks, lunches or dinners to create meaningful interactions



Make the agenda of the day easily accessible to all guests in digital and hard copy format so they can plan their attendance in advance

Mistake #4

Failing to prepare speakers is preparing to fail

Your presentation deck is important, but slides can't tell your story alone - the speaker does.

If your speakers aren't confident and compelling, the message gets lost, no matter how good the content is.

Dedicating too much time and energy to the production of supporting visuals at the expense of speaker preparation is a common mistake.

Public speaking is a skill that requires time, practice and repetition to master.

HOW TO AVOID IT

Make sure all speakers are prepared and confident to deliver their message with impact.

Their energy, body language and tone should lead the presentation, with visuals playing a supporting role – not the other way around.

BEST PRACTICES

Script all presentations to ensure accurate timing, consistent messaging and maximizing audience impact

Provide training in public speaking techniques to help speakers maintain engagement and effectively communicate key messages

Schedule rehearsals the day before the event to fine-tune delivery, improve coordination and ensure seamless presentation

Mistake #5

Underestimating the role of a Master of Ceremonies

AGMs are high-stakes events where every detail matters. Without a clear structure and an engaging flow, even the most carefully thought content can fall flat.

Disjointed transitions, speakers running over time, and an inconsistent tone **can make the event feel uncoordinated and reduce its impact.**

HOW TO AVOID IT

A skilled Master of Ceremonies (MoC) is essential to delivering a well-structured and impactful AGM.



Appoint an experienced MoC to maintain structure & engagement – managing timing, transitions and the energy in the room.



Provide the MoC with a clear script and briefing – to ensure smooth flow between sessions, strong audience interactions and reinforce messaging

Asset classes

Accellency's in-house expertise

With in-house expertise across 8 alternative asset classes, we offer the expert resources **to create the most impactful AGMs.**

190+

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mandates

80%

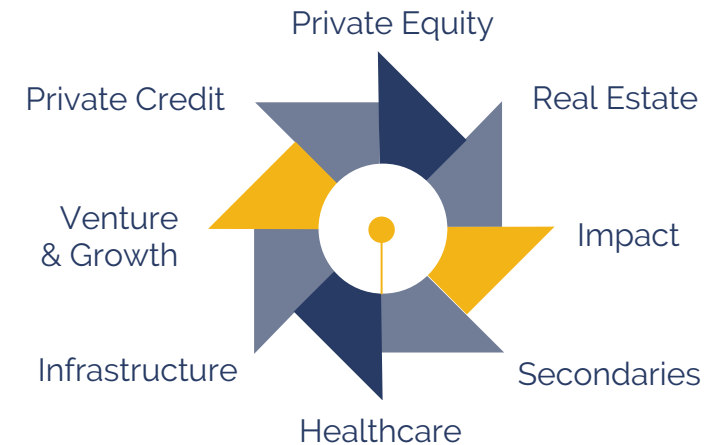
GP platform clients work
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Total AUM of our
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8

Asset classes
In-house expertise





Accellency is a strategic consultancy dedicated to **Investor Relations** and **Capital Markets**.

We advise investment funds and portfolio companies on strategy, content and delivery to raise capital, increase investor engagement and boost valuation. Our team brings together highly experienced professionals in investment banking, equity research, institutional investment, sales and investor relations.

For investment funds, we design and execute business development roadmaps ranging from fund positioning and GP platform strategy to roadshow preparation, AGMs and thought leadership publications. For portfolio companies, we pioneered the use of equity story as a tool for exit readiness. We advise on private exits and IPOs as well as helping listed companies take control of their equity story to maximise valuation.

LONDON

11-13 Charlotte Street
Fitzrovia
W1T 1RH

PARIS

7 rue Saint Lazare
75009 Paris

www.accellency.eu