

FIRM NEWS

Schulte Roth & Zabel Presents Its 12th Annual Shareholder Activism Conference

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Schulte Roth & Zabel (SRZ), a market-leading law firm serving the financial services industry, is hosting its 12th Annual Shareholder Activism Conference today. The virtual event highlights prominent players in the shareholder activism space, including activist investors, advisers and proxy advisory firms. The speakers will engage in discussions around the current activist environment and major campaigns of the past year; the strategies behind successful activism campaigns; and emerging trends in the activism space.

Ele Klein and Marc Weingarten, SRZ partners and co-chairs of the firm's global Shareholder Activism Group, will spearhead the annual event. Michael Swartz, co-chair of SRZ's Litigation Department, will provide introductory remarks, followed by a short overview of the state of the market and trends for the 2021-2022 proxy season led by SRZ associate Brandon Gold and featuring Josh Black of Insightia.

Mr. Klein will moderate a panel entitled "Anatomy of a Campaign: Engine No. 1 & Exxon," diving into his leadership role in this year's pivotal Engine No. 1 shareholder activism campaign against Exxon, also featuring Scott Winter with Innisfree M&A Incorporated and Jonathan Gasthalter with Gasthalter & Co.

Mr. Klein will also moderate a panel on "Proxy Advisory Firm Perspectives," with Jason McCandless with Glass Lewis and Cristiano Guerra with ISS.

Additionally, Mr. Klein and Mr. Weingarten will lead discussions on “The State of Activism,” featuring Geoffrey Sorbello with Elliott Management, Jeffrey Smith with Starboard Value, Scott Ostfeld with JANA Partners LLC, and Brian Baldwin with Triam Partners.

Cara Lombardo of the Wall Street Journal will also moderate a panel on “Institutional Investors Employing the Activism Toolkit/ESG Trends,” featuring Aisha Mastagani of CalSTRS and Lauren Taylor Wolf of Impactive Capital.

Additionally, the conference will spotlight the insights of the following SRZ attorneys on key activism-related issues: Michael Swartz on TCI's say-on-climate win; Adriana Schwartz on the SEC's increased involvement in activism matters; and Gayle Klein on activism campaigns in the cryptocurrency space.

“We are excited to present our 12th Annual Shareholder Activism Conference, especially as the global spotlight continues to shine on the activism space,” said David Efron, SRZ co-managing partner and co-head of the Investment Management Group. “In the wake of a number of high-profile, successful campaigns this year, we are proud to offer timely, thoughtful discussions on the key issues impacting this space,” added Marc Elovitz, SRZ co-managing partner and chair of the Investment Management Regulatory & Compliance Group.

Mr. Klein said, “This year's conference will explore a number of topical issues in the activism space, bringing in a range of diverse perspectives, from proxy advisor firms to institutional investors. Looking ahead to what's likely to be another monumental year for activism campaigns, our event will feature in-depth and thoughtful conversations on some of the most significant trends impacting this space.” Mr. Weingarten added, “We are also proud to offer discussions that provide a nuanced perspective on some of the emerging trends in the activism space, including increased attention from the SEC and the issues, like climate, that are gaining the most traction.”

Register for SRZ's Shareholder Activism Conference [here](#).

Related People



**Ele
Klein**

Partner
New York



**Marc
Weingarten**

Partner
New York



**David
Efron**

Partner
New York



**Marc
Elovitz**

Partner
New York



**Michael
Swartz**

Partner
New York



**Adriana
Schwartz**

Partner
New York



**Brandon
Gold**

Special Counsel
Washington, DC

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