A photograph of a modern, high-ceilinged lobby with a grid-patterned skylight. On the left, a glass wall features the J.P. Morgan logo and the address "227, 228-31". In the center, a large digital screen displays a news broadcast with a man in a suit and the text "GOP HEALTH CARE PLAN" and "OBAMA CARE REPEAL STALLED". Several people in business attire are walking through the lobby, some blurred to indicate motion. A blue semi-transparent banner is overlaid at the bottom.

## Effective Investor Relations – Financial Communications Strategies

Business Fundamentals for PA Professionals | February 15, 2023

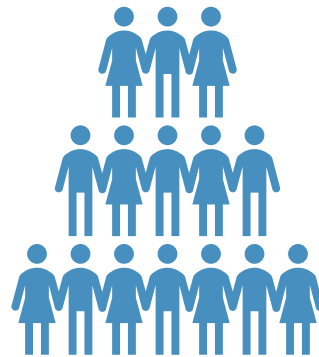
Jerry Dubrowski, Managing Director - Corporate Communications | JPMorgan Chase

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Best practices for sharing  
financial information



Developing a compelling  
storyline that appeals to all  
stakeholders



Integrating social media  
into your stakeholder  
communications





## Developing a Compelling Storyline for ALL Stakeholders

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### Written materials

- Clear, concise and comprehensive mix of text and graphics
- Robust Key Performance Indicators (KPIs) that can be used through the cycle
- Consistent reporting periods (Y/Y or Q/Q)



### Investor call

- 45-60 minutes, including Q&A (20 minutes presentation)
- Scripted remarks and preapproved Q/A responses



### Media call

- Hit the highlights
- Quotable quotes for media call and interviews

Managing expectations is an important element of effective financial communications



## Integrating Social Media into Stakeholder Communications

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### Disclosure

Make sure your social strategy is consistent with your disclosure rules and that you have designated social media spokespeople and a clear process for approving content before it's published.

### Socially acceptable content

Work to create compelling content that complements traditional communications (press releases, earnings calls and investor presentations). Select a few key metrics of most interest to investors. Include quotes from press release and link back to public information.

### Graphics can carry the message farther

Leverage graphics, video and other media to emphasize key updates and achievements. Experiment with multiple media to see what resonates most with your target audience.

### Inspect what you expect

Establish key performance indicators (KPIs) for measuring success with goals that include increasing visibility, transparency and brand awareness.

### Watchout!

Social media is open to all meaning everyone and anyone has the ability to comment on what you post. If you're announcing negative news, layoffs, or a restructuring you may want to reconsider using social media as a channel.