

4 FEBRUARY 2026

Retail Shareholders Engagement Practices

A virtual classroom organised by



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Academy – Euronext Group

At Academy we aim at sharing **capital markets expertise** by turning it into world-class training courses and programmes.

Our programmes reflect the evolution and trends of **financial markets and their eco-systems**.

Key assets of our learning centre are our centrality in capital markets, and our **internal and external faculty**, whose contributors are drawn from practitioners, academics, advisors and financial market specialists.

As an Exchange system, being at the centre of financial markets, we understand not just what happens now, but also what's changing - so we can design our courses to equip you for the world of today and tomorrow.

An accredited Management System Certificate

Euronext Corporate Solutions Italy, where Academy sits, meets the management system Standards **ISO 9001:2015**, **IAF 37** certified by DNV.

The accreditation guarantees internationally recognised quality service standards and allows companies to apply for public funding to finance individual and company training projects.



Upcoming courses

Investor Relations Certification Programme

17 March – 9 July 2026, Blended Programme

Check our courses calendar [here](#).

Programme overview

Background

Retail shareholder engagement refers to the strategies and practices companies use to communicate with and involve individual investors who hold shares outside of institutional portfolios.

In recent years, **the importance of engaging retail shareholders has grown**, driven by regulatory changes, technological advancements, and a recognition of the influence that retail investors can have on key corporate decisions such as mergers and acquisitions, annual general meetings, and extraordinary general meetings.

Effective engagement not only helps companies **secure necessary votes** but also **fosters transparency, trust, and long-term loyalty** among their retail investor base. As the landscape of shareholder activism evolves, organisations are increasingly adopting innovative approaches to ensure that retail shareholders are informed, empowered, and motivated to participate in corporate governance processes.

Objectives

Several key outcomes can be expected from this course. Delegates will be exposed to:

- deepen their understanding of retail shareholder engagement
- gain practical insights from real-world case studies, and
- develop the skills needed to design and implement effective engagement campaigns.

By participating in interactive exercises and group discussions, attendees will be able to assess their own organisation's current approach, identify challenges, and explore innovative strategies for involving retail shareholders in key corporate events.

Who should attend

This training programme is addressed to:

- Company secretaries
- Investor Relations Officers
- Corporate Communications Professionals
- Legal and Compliance Teams
- Senior Executives responsible for shareholder engagement strategies
- Advisory roles

Our faculty

Anneke Hoijtink
Managing Director
FGS Global

Chair of the Board
NEVIR

Annelie Heitmann
Associated Director
FGS Global

David Jenal
Associated Director
FGS Global

Methodology

Learning tools

The workshop will take place on Teams.

Learning material

The course material will be provided to the delegates in pdf format the day after the course has taken place.

Certificate of attendance

The certificate of attendance will be sent in digital format after the end of the course.

Course Agenda

4 February 2026

9.30

Welcome & Introduction

9.45

Theory Block: Retail Shareholder Engagement

10.15

Case Studies: The Spectrum of Retail Engagement

- Introduction to Case Studies:
 - Purpose: Demonstrate the range of engagement approaches
- Case Study 1: M&A example
- Case Study 2: AGM example
- Case Study 3: US EGM example

10.45 Break

11.00

Interactive Workshop

Step 1: Mapping Exercise

- Facilitator: "Where do you see your organization today?"
"What challenges do you face?"
- Attendees will be asked to prepare a retail shareholder campaign for either an AGM or an M&A scenario

Step 2: Group Discussion

12.00 Practical Checklist & Wrap-up

Faculty:

Anneke Hoijtink
Managing Director
FGS Global

Chair of the Board
NEVIR

Annelie Heitmann
Associated Director
FGS Global

David Jenal
Associated Director
FGS Global

Terms and conditions

The registration form is a legally binding agreement between Euronext Corporate Solutions Italy S.r.l. and the applicant (or the company the applicant works for) and is defined by the following conditions:

Virtual classroom schedule

4 February 2026: 9.30 – 12.00 CET

Registration

The applicant can submit the registration form, duly filled out, to Academy 7 days prior to the course date via:

- **EMAIL** academy@euronext.com
- **WEB** [Academy website](#)

To register after this date, please contact the following phone number:

- **TEL +39 02 72426.086**

Participation will be confirmed in writing by the Academy administration.

Registration fee

The **individual registration** fee is € **490** + VAT (if applicable).

NEVIR member: 20% discount on the individual registration.

Discounts

Multiple registrations - Discounts are available for multiple registrations of the same company. In particular:

- Two participants: 10% discount on the total amount
- Three participants: 15% discount on the total amount

Payment method

Fees must be paid:

- Upon receipt of the email from Academy confirming the applicant's registration (sent approximately 7 days prior to the course date)

or

- Upon receipt of the invoice from Euronext Corporate Solutions Italy S.r.l. (Academy is part of the Euronext Corporate Solutions Italy S.r.l. Company)

Payment must be made via **BANK TRANSFER** to:

Euronext Corporate Solutions Italy S.r.l.

P.zza degli Affari, 6

20123 Milano

Tax Code **11734560961**

VAT No. **IT11734560961**

Intesa San Paolo S.p.A.

P.zza Cordusio, 4

20123 Milano

IBAN - **IT22 N030 6901 6261 0000 0125 565**

BIC - **BCITITMM**

A copy of the bank transfer must be emailed to Academy at academy@euronext.com.

An invoice will follow and will be sent to the email addresses given on the booking form.

Intellectual property rights

The Client acknowledges and agrees that the contents made available during the training (including, but not limited to, videos, pictures and texts) are property Euronext Corporate Solutions Italy S.r.l. or are supplied by Euronext Corporate Solutions Italy S.r.l. in virtue of certain contractual arrangements with third parties and cannot be reproduced, distributed or used for business purposes without the prior written consent of Euronext Corporate Solutions Italy S.r.l. or the entity having the relevant rights on the same.

Liability

Whilst every effort is made by Euronext Corporate Solutions Italy S.r.l. to ensure that the contents of the training (including, but not limited to, videos, pictures and texts) are accurate and up to date, Euronext Corporate Solutions Italy S.r.l. shall not be liable whatsoever for any

inaccuracy or misleading information, nor for any consequential damage or expense or any loss of profit or any liability to third parties incurred as a result of reliance on such information, which is provided for educational purpose only. Euronext Corporate Solutions Italy S.r.l. total liability under this agreement shall be limited to the maximum amount represented by the Fees paid to the latter by the Client.

Traceability of financial flows

Euronext Corporate Solutions Italy S.r.l. and the Client assume all obligations regarding the traceability of the financial flows provided by Law 136/2010, as subsequently amended and implemented (the "Traceability Obligations").

In relation to the payments to be made pursuant to the present Contract, the Client, if it is a public contractor pursuant to decree law 163/2006 (Code of public contracts for works, solutions and supplies), to ensure the enforcement of Law 136/2010 and subsequent amendments, undertakes to communicate to Euronext Corporate Solutions Italy S.r.l., by the form attached to the Contract, the identification bidding code (CIG) and, in case, the unique code of project (CUP).

In particular, in fulfilling the Traceability Obligations, Euronext Corporate Solutions Italy S.r.l. will communicate to the Client:

- (i) the bank accounts details to be used, also nonexclusively, for the payments to be made by the Client pursuant to the present Contract;
- (ii) the personal details and the fiscal code of the persons delegated to operate on them, indicating the relevant role and powers, within 7 (seven) days from the creation of the accounts above (or, in case of existing accounts, within 7 (seven) days from their first use in relation to the payments made by the Client).
- (iii) Any possible amendment of the information indicated in points (i) and (ii) above, will have to be communicated by the Client within 7 (seven) days from occurrence.

Let it be understood that, save for possible derogations and partial exemptions to Law 136/2010, failure to use instruments suitable to permit the full traceability of the financial flows (for instance, bank or post transfer) and

the failure to comply with any other Traceability Obligations, are ground to terminate the present Contract.

Euronext Corporate Solutions Italy S.r.l. Solutions undertakes, in particular, to inform the Client and the Prefecture (territorial office of the Government of the province where the Client has its registered office) if it becomes aware of breaches by its contractual counterparties, if any, in relation to the Traceability Obligations.

Cancellation Policy

According to article 1373 C.C., to withdraw from this contract applicants must send a written notice via email to academy@euronext.com:

- The fee will be fully refundable up to 7 working days prior to course date.
- A 50% refund will be provided for cancellations made during the 6 days leading to the course,
- Fees are non refundable for cancellations made 1 day prior to the course date.

Substitution of attendee (from the same company) may be made at any time.

Academy accepts requests to replace the course with another Academy course. The rescheduled training must take place within 12 months.

Changes to the program

Euronext Corporate Solutions Italy S.r.l. reserves the right to postpone or cancel the course and notify the participant via fax or email at least 1 week before the course date; in this case, the participant is entitled only to a full refund of the course fee. In addition, Euronext Corporate Solutions Italy S.r.l. is entitled to make changes to the programme and seat of the training and/or substitute the expected panellists with others with equal skills and competence.

Governing law and jurisdiction

The present agreement shall be governed by Italian law. The parties assign to the Court of Milan the exclusive jurisdiction over any dispute arising out the present agreement, this including – but not limited to – any proceedings regarding the validity, the construction, the performance and/ or the termination of the agreement.

Booking form

Please read the terms and conditions on the previous page. Fill out the form and send email to academy@euronext.com.

For further information +39 02 72426086 – academy@euronext.com

Retail Shareholders Engagement Practices

Virtual Classroom – 4 February 2026

REGISTRATION FEE

| | | |
|----------------|---------------------|--------------------------------------------------------|
| Individual | | <input type="checkbox"/> € 490 + VAT (if applicable) |
| 2 participants | 10% discount | <input type="checkbox"/> € 882 + VAT (if applicable) |
| 3 participants | 15% discount | <input type="checkbox"/> € 1,250 + VAT (if applicable) |
| NEVIR members | 20% discount | <input type="checkbox"/> € 392 + VAT (if applicable) |

PARTICIPANT INFORMATION

Name and Surname

Jop title

Company

Email

Phone

| Job Field | | | Knowledge level of the subject |
|-----------------------------------------------------------|--------------------------------|-------------------------------------------------------|---------------------------------------|
| <input type="checkbox"/> General Management | <input type="checkbox"/> ICT | <input type="checkbox"/> ESG and Sustainable Business | <input type="checkbox"/> Basic |
| <input type="checkbox"/> HR, Organisation and Development | <input type="checkbox"/> Legal | <input type="checkbox"/> Finance | <input type="checkbox"/> Intermediate |
| <input type="checkbox"/> Administration and Control | <input type="checkbox"/> R&D | <input type="checkbox"/> Risk Management | <input type="checkbox"/> Advanced |

Nature of business

| | | | |
|--------------------------------------------------|------------------------------------------|-----------------------------------------|---------------------------------|
| <input type="checkbox"/> Listed/unlisted company | <input type="checkbox"/> Bank | <input type="checkbox"/> Advisory | <input type="checkbox"/> Energy |
| <input type="checkbox"/> Lawyer | <input type="checkbox"/> Investment Bank | <input type="checkbox"/> Private Equity | <input type="checkbox"/> Funds |

Company Address

| | | | | |
|--------|----|----------|------|---------|
| Street | N. | Zip code | City | Country |
|--------|----|----------|------|---------|

BILLING INFORMATION

The invoice must be addressed to:

Company name/Participant name and surname

VAT number

Department

Billing reference name

Street

N.

Zip code

City

Country

Phone

Email

ELECTRONIC INVOICE (IF APPLICABLE)

According to the Italian Law no. 205 of 27.12.2017 and to Provision no. 89757 of 30.4.2018 of the Italian TAX Authority and subsequent amendment and/or integrations, the Client duly holder of an Italian VAT code/Tax identification code) provides with:

Certified Email Address (PEC):

Or Recipient Code:

In order to receive the electronic invoice through the Italian Exchange System (SDI) according to the above information

Phone

Email

SPLIT PAYMENT (IF APPLICABLE)

According to the art. 17-ter of the Italian D.P.R. no. 633/72 (as subsequently amended and implemented), the Client (duly holder of an Italian VAT code/Tax identification code) declares that:

☐ is subject to the "Split Payment" VAT regime ☐ is not subject to the "Split Payment" VAT regime

and undertakes to communicate any change of such regime.

PRIVACY

The data collected are necessary for Euronext Corporate Solutions ("ECS"), a subsidiary of Euronext N.V., to process your request for registration for the course/event (the "Programme") as well as to send you information about the Programme. Detailed information about the manner in which ECS collect and process your personal data and how you can exercise your rights is set out in the Privacy Statement of ECS, accessible at: [Privacy Policy | Euronext Corporate Solutions](#).

I accept the General Terms and Conditions of the service and I declare that I have read and understood the Privacy Statement regarding the processing of personal data. *

☐ YES

In addition to the declaration above, I also inform that:

I give my consent (which I can revoke subsequently in any case) to the receipt of newsletters, marketing and promotional communications, sent by any means by ECS and by the companies of the Euronext Group, to which my data will be communicated, relating to their products and solutions. *

☐ YES

☐ NO

* mandatory field

Signature and company seal

Date:

Academy

Comprehensive, quality education is fundamental for the development and growth of the economy. As part of a pan-European market infrastructure at the centre of European capital markets, Academy's main objective and activity is turning capital markets expertise into world-class training courses and programmes and making them relevant to the wider financial community of today and of tomorrow. Key Academy assets are our centrality in capital markets, and our internal and external faculty, made up of practitioners, academics, advisors and financial market specialists. Interactive and innovative learning methods make all Academy programmes an inspiring experience.

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ISO 9001

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