

# The LP-Centric AGM Planning Checklist

## TIMING & COMMUNICATION

- Survey key LPs for preferred AGM dates
- Schedule AGM with 12+ months lead time
- Maintain consistent annual date & city
- Avoid conflicting events in host city
- Limit to one AGM per year

## LOGISTICS & VENUE

- Confirm venue AV setup and comfort (temp, space)
- Reserve a large enough space to avoid crowding
- Offer virtual attendance option if needed
- Book hotel room blocks early

## SWAG & GIFTS

- Avoid generic, overdone swag
- Offer family-focused or pet-friendly gift ideas
- Provide LPs with gift choice and delivery options
- Accommodate gift restrictions for public LP

## CONTENT & ENGAGEMENT

- Focus on new/highlight portcos, not every single one
- Show aggregate performance & portfolio construction
- Align deal team messaging ahead of time
- Include educational sessions or portco CFOs
- Invite consultants & key prospects strategically
- Schedule separate LPAC dinner or session
- Share firm ops improvements to show ROI on fees
- Send slides and follow-up promptly

## ABOUT ALTVIA

Founded in 2006, Altvia is the leading private capital platform purpose-built for the full fund lifecycle. Our powerful platform serves private equity, venture capital, fund of funds, and other alternative asset managers so they can grow faster, work smarter, and stay ahead.

Altvia removes the friction that slows teams down. We streamline workflows across sales, marketing, compliance, fundraising, and investor relations—connecting siloed data and automating key processes so firms can focus on building relationships and closing deals.