

# The LP-Centric AGM Planning Checklist

## TIMING & COMMUNICATION

- Survey key LPs for preferred AGM dates & schedule with 12+ months lead time
- Pre-event: Ask LPs what topics matter most & feed into agenda design
- Use pre-reads for sensitive and complex data
- Post-event follow-through within 2 weeks including logging insights into CRM

## 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
- Determine reception strategy

## SWAG & GIFTS

- Avoid generic, overdone swag
- Tie swag to your firm's brand or local culture
- Consider how swag & gifts travel
- 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 with experts or portco CFOs
- Invite consultants & key prospects strategically
- Schedule separate LPAC dinner or session
- Share firm ops improvements to show ROI on fees
- Showcase authenticity and culture – LPs use AGMs as a form of live due diligence

## ABOUT ALTIVIA

Founded in 2006, Altvia is the leading private capital platform purpose-built for the full fund lifecycle. Our integrated suite—CRM, investor portal, data room, analytics, and AI assistant—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 connect siloed data and streamline workflows across deal management, fundraising, investor relations, compliance, and reporting—automating key processes so firms can focus on building relationships and closing deals.