

Day 1 | Wednesday, March 4

8:00am **Registration and welcome breakfast**

7:45am **LP think tank breakfast** (*Invitation-only*)

Facilitators: **Andrew Malk**, Managing Partner, Malk Partners
Matt Schey, Director, Strategic Projects, Institutional Limited Partners Association (ILPA)

9:05am **PEI welcome**

Seth Kerker, Director Events - Americas, PEI

9:10am **Chairperson's opening remarks**

Chris Fowle, Head of Americas, PRI

9:15am **Keynote fireside chat**

Robert L Greene, President & CEO, National Association of Investment Companies (NAIC)
Interviewed By: **Jordan Stutts**, Senior Reporter, Infrastructure Investor

9:45am **LP roundtable**

- Is PE under threat and how do we think about its role and social impact and the economy? How does ESG play a role?
- Fiduciary duties
- Do LPs have control over the capital?
- Flow of information between LPs and GPs
- How to evaluate managers
- Assessments and performance

Moderator: **Elizabeth Seeger**, Director, Sustainable Investing, KKR

Panelists: **Michael T. Cappucci**, Senior Vice President, Compliance and Sustainable Investing, Harvard Management Company, Inc.

David Russell, Head of Responsible Investment, USS Investment Management Ltd

Andrew Siwo, Director of Sustainable Investments and Climate Solutions, New York State Common Retirement Fund

10:30am **Morning networking break**

10:45am **Impact investing**

- Raising capital for impact: what assets owners are looking for and fund managers can provide
- Aligning on industry standards (Impact Management Project, IFC Operating Principles for Impact Management, IRIS+ Metrics)
- Clash between negative and positive impacts for multi-billion dollar managers

Moderator: **Ryan Miller**, Partner, Malk

Panelists: **Chris Cozzone**, Principal, Sustainability lead, Double Impact, Bain Capital

Megan Starr, Principal and Head of Impact, The Carlyle Group

Julia Wittlin, CFA, CAIA, FRM, Managing Director, Portfolio Manager, BlackRock Private Equity Partners Group

AGENDA

11:30am **ESG data**

- How well is that data output performing in comparison to peers
- Are we able to benchmark fund manager performance?
- Can we marry performance data with ESG performance data? Are we able to communicate the info to LPs
- How to drive meaningful data

Moderator: Alison Humphrey, Director of Environmental Social Governance, TPG

Panelists: Dr. Philipp Aeby, CEO, RepRisk

Adam Black, Head of ESG & Sustainability, Collier Capital

Jeff Cohen, Institutional Product Strategist, Sustainability Accounting Standards Board (SASB);

12:15pm **Keynote spotlight discussion**

Alison Fenton-Willock, SVP and Global Head of ESG, Blackstone

Interviewed by: Isobel Markham, Senior Editor, Private Equity Group, Americas, PEI

12:45pm **Networking lunch**

1:50pm **Impact Investing: How to participate in this emerging investing opportunity**

- LP, GP, and company perspectives on having a fund, committing capital, and managing investments related to impact
- Understanding how to effectively measure and manage impact

Moderator: Dan Mistler, ESG Specialist, Bridge House Advisors

Panelists: Alifia Doriwala, Managing Director and Partner, RockCreek

Tony Jace, CEO, CPI

Adam Reinmann, Managing Director, CEO of Wendel North America, Wendel

Jennifer Signori, Senior Vice President, ESG and Impact Investing, Neuberger Berman

2:35pm **Breakout series**

Track A | Responsible investing for real estate investors: developing underserved areas

- Affordable Housing
- Fragmented sustainability standards
- Sustainability Metrics: Translation and impact on property investment and management
- Strategies for investing in sustainable REITs

Moderator: Carl Spevacek, Manager, Environmental, Social, and Governance (ESG) Services, RPS Group

Panelists: Ada Arevalo, Chief Impact Officer, Alliant Strategic Investments

Lisa Davis, Executive Director and Portfolio Manager, Impact Investing, PGIM Real Estate

Inna Khidekel, Partner, Capital Markets, Bridge Investment Group

Anna Murray, Vice President of Sustainability, BentallGreenOak

Track B | ESG in private debt and responsible lending

- Applying an ESG strategy across different debt instruments
- Conducting ESG diligence in credit with limited access to information, balancing rigor and flexibility for large portfolios
- ESG-focused CLOs: market opportunities and additional scrutiny

Moderator: Mike Hinkley, Vice President, Malk Partners

Panelists: Greg Bowes, Co-Founder and Managing Principal, Albright Capital

Brian Good, Senior Managing Director and Co-head of Tradable Credit, First Eagle Alternative Credit

Candice Richards, Compliance Officer, MidOcean Partners

Track C | Benchmarking infrastructure for ESG performance

- Responsible Investment Strategies in Infrastructure
- ESG and the long-term ownership of infrastructure assets
- Developing a process to integrate ESG in investment decisions
- Formulating an ESG policy and integrating it into the due diligence process
- ESG issues over the investment's lifespan
- Supply Chain ESG Risks

Moderator: John Hodges, Managing Director, Infrastructure and Finance, BSR

Panelists: Nick Cleary, Partner, Vantage Infrastructure

Samuel J. Lissner, Vice President, Ridgewood Infrastructure

Michael D. Underhill, Chief Investment Officer, Capital Innovations, LLC

AGENDA

3:20pm **Afternoon networking break**

3:30pm **ESG programs: from policy to integration**

The principles that guide a firm's ESG program are documented in the ESG policy. Many firms also use the ESG policy to describe the scope, governance structure, and management system of the ESG program. The purpose of this session is to share insights on taking an ESG program from policy to integration.

- How detailed should an ESG policy be?
- How do you use your policy to drive ESG integration across your investments?
- What challenges did you face in integrating ESG considerations across the firm?

Moderator: Alan Kao, Global Service Line Leader - Compliance, Strategy & Transaction Services, Ramboll

Panelists: Lee Coker, ESG Officer, Oak Hill Capital Funds

Sophie Flak, CSR and Digital Director, Eurazeo

Bryn Gostin, Senior Director, Head of Product Development & Strategy, Capital Dynamics

Leela Ramnath, Director of ESG, Warburg Pincus

Jeff Pentland, Managing Director, Northleaf Capital Partners

4:25pm **2020 LAVCA Awards Presentation**

- Environmental Responsibility Award
- Environmental Responsibility Honorable Mention
- Social Responsibility Award
- Latin American Private Equity Award

Presenter: Cate Ambrose, Board Member, LAVCA

4:40pm **Keynote Fireside Chat**

Ken Mehlman, Member and Global Head of Public Affairs, KKR

Interviewed by: Isobel Markham, Senior Editor, Private Equity Group, Americas, PEI

5:10pm **Chairman's closing remarks**

Chris Fowle, Head of Americas, PRI

5:15pm **Cocktail reception**

Day 2 | Thursday, March 5

7:45 am **Women's networking breakfast (Invitation-only)**

Facilitator: Stephanie Campbell, General Partner, The Artemis Fund

8:00am **Registration and breakfast**

9:05am **Chairperson's welcome**

Christine Pishko, US Relationship Manager, Global Signatory Relations and Outreach, PRI

9:10am **Keynote spotlight discussion**

Suzanne Tavill, Global Head of ESG, Stepstone Group

Interviewer: Christine Pishko, US Relationship Manager, Global Signatory Relations and Outreach, PRI

9:40am **Corporate governance and board diversity**

- Diversity at the investment professional and portfolio board level
- How should board members be focused on ESG and what does that mean?

Moderator: Beth Lowery, Managing Director, TPG

Panelists: Stephanie Campbell, General Partner, The Artemis Fund

Frances Higgins, General Partner, WCAS

Don Reed, Executive Director, Anthesis Group

Jemma Wolfe, Head of Launch With GS, Goldman Sachs

10:25am **Morning networking break**

10:50am **Breakout series**

Track A | Responsible agriculture investment strategies

- Defining and advancing responsible agricultural investments

Moderator: Chris Janiec, Senior Editor, Agri Investor

Panelists: Tom Amis, Head of the EQ Controlled Environment Team, Equilibrium

Adam Fless, Managing Director, Portfolio Excellence, Paine Schwartz Partners

Sanaz Raczynski, Managing Director, Head of Sustainability, Nuveen

Track B | ESG challenges in healthcare

- Governance: Term Strategy is crucial
- Impact investing in healthcare

Moderator: Ashley Armstrong, Sustainability Consultant, Bridge House Advisors

Panelists: Stephen Bianca, Director of Compliance, Alpine Investors

Matt Jameson, CFA, Managing Director, BlueMountain Capital Management

Scott Li, Managing Director, CRG

Jay Rose, Managing Partner, Amulet Capital Partners

AGENDA

11:40am **An emerging mandate: ESG reporting**

- An overview of the ESG reporting landscape
- Considerations for public disclosure vs. private communications to LPs
- How external stakeholders evaluate your reporting
- Best practices for gaining value from the reporting process

Moderator: Sarah Corrigan, Principal Consultant, ERM

Panelists: Matthew Hershenson, Head of Investor Relations, Paine Schwartz Partners

Viviana Occhionorelli, ESG Director, Astorg

Jon Samuels, Partner, The Vistria Group

Humberto Suarez, Controller, Lafise Investment Management

12:25pm **Climate change**

- Preparing climate-related financial disclosures and/or evaluating climate risks as part of pre-acquisition due diligence
- Assessment of transition and physical climate risks to align with various reporting frameworks (CDP, TCFD)

Moderator: Susan R. Kemball-Cook, PhD, Principal, Ramboll

Panelists: Michael Hall, Sustainability Manager, Development Partners International (DPI)

Jay L. Koh, Managing Director, The Lightsmith Group

Emily Kreps, Global Director, Investor Initiatives, CDP

Brooks Preston, Division Director, Macquarie Infrastructure and Real Asset's (MIRA)

1:15 pm **Chairman's closing remarks**

Christine Pishko, US Relationship Manager, Global Signatory Relations and Outreach, PRI

1:15pm **Networking lunch**



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