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: A real conversation about diversity
       Robert L. Greene, President & CEO, National Association of Investment Companies (NAIC)
       Interviewed By: Jordan Stutts, Senior Writer, Private Markets, PEI

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
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: Don Reed, Executive Director, Anthesis Group**
**Panelists:** Dr. Philipp Aeby, CEO, RepRisk  
Adam Black, Head of ESG & Sustainability, Coller Capital  
Jeff Cohen, Institutional Product Strategist, Sustainability Accounting Standards Board (SASB)  
Abrielle Rosenthal, Managing Director, Chief Compliance Officer and Chief Human Resources Officer, TowerBrook

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:** Justin Kulla, Founder & Managing Partner, Consequential Capital  
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, Principal, Sustainable Investing, 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, Chief Product Strategist, 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  
Michael D. Underhill, Chief Investment Officer, Capital Innovations, LLC
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  Closing keynote address

Ken Mehlman, Partner, Global Head of Public Affairs & Co-Head, KKR Global Impact
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: Carol Jeppesen, Head of US, 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: Tim Clare, Director, UK, Anthesis Group
    Panelists: Stephanie Campbell, General Partner, The Artemis Fund
    Frances Higgins, General Partner, WCAS
    Jemma Wolfe, Head of Launch With GS, Goldman Sachs
10:25am  Morning networking break
10:50am  Breakout series

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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
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**