

## Day 1 | Wednesday, March 4

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

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

9:05am **PEI welcome**

**Seth Kerker**, Director Events - Americas, PEI

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

**Chris Fowle**, Head of Americas, PRI

9:15am **Opening keynote address**

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

**Panelist: Megan Starr**, Principal and Head of Impact, The Carlyle 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);**

**Adam Heltzer, ESG & Sustainability, Partners Group**

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 T. Arevalo, VP, Fund Management, Avanath Capital Management  
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, THL Credit**

**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

**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 policy: formation, implementation and integration**

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

**Panelist: Jeff Pentland**, Managing Director, Northleaf Capital Partners

**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

4:25pm **LAVCA awards presentation & case studies**

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

8:00am Registration and breakfast

7:45 am Women's Networking Breakfast (Invitation-only)

**Facilitator: Stephanie Campbell, General Partner, The Artemis Fund**

9:05am Chairperson's welcome

**Chris Fowle, Head of Americas, PRI**

9:10am Keynote spotlight discussion

**Suzanne Tavill, Global Head of ESG, Stepstone Global**

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**

**Panelist: Stephanie Campbell, General Partner, The Artemis Fund**

10:25am Morning networking break

10:50am Breakout series

### Track A | Responsible agriculture investment strategies

- Defining and advancing responsible agricultural investments

**Panelists:**

**Tom Amis, Head of the EQ Controlled Environment Team, Equilibrium**

**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, Co-Founder and acting CCO, 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**

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**

**Panelist: Emily Kreps, Global Director, Investor Initiatives, CDP**

1:00pm **Chairman's closing remarks**

**Chris Fowle, Head of Americas, PRI**

1:00pm **Networking lunch**



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