

Day 1 | Wednesday, March 4

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

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

7:45am **GP leadership 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

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

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

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

Panelists: Adam Black, Head of ESG & Sustainability, Collier Capital; **Jeff Cohen**, Institutional Product Strategist, Sustainability Accounting Standards Board (SASB); **Adam Heltzer**, ESG & Sustainability, Partners Group

AGENDA

12:15pm **Blackstone keynote discussion**

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

Panelist: Alifia Doriwala, Managing Director and Partner, RockCreek

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

Panelists: Inna Khidekel, Partner, Capital Markets, Bridge Investment Group

Ada T. Arevalo, VP, Fund Management, Avanath Capital Management

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

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

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

Panelist: Nick Cleary, Partner, Vantage Infrastructure

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

4:15pm **LAVCA awards presentation & case studies**

- 4:30pm **Closing keynote address**
- 5:05pm **Chairman's closing remarks**
Chris Fowle, Head of Americas, PRI
- 5:10pm **Cocktail reception**

Day 2 | Thursday, March 5

- 8:00am **Registration and breakfast**
- 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?
- 10:25am **Morning networking break**
- 10:50am **Breakout series**
- Track A | Responsible agriculture investment strategies**
- Defining and advancing responsible agricultural investments
Panelist: Sanaz Raczynski, Managing Director, Head of Sustainability, Nuveen
- Track B | ESG challenges in healthcare**
- 11:40am **How to invest in renewable energy responsibly**
- 12:20pm **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
- 1:00pm **Chairman's closing remarks**
Chris Fowle, Head of Americas, PRI
- 1:00pm **Networking lunch**



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