

Private Equity
International

Responsible Investment Forum: New York Virtual Experience 2021

March 3-4 Available Anywhere

Co-Host:
 **PRI** Principles for
Responsible
Investment

Preliminary Agenda

March 3rd | Day 1

9:00am - 9:55am | LP Think Tank (Invitation-only)

- How has Covid-19 impacted on your current investments, and what will be the long-term impact on your future investment strategy?
- Are you evaluating managers differently?
- Compared to this time last year, are ESG considerations more/same/less important to your investment decisions?

Moderator: Matthew D. Schey, *Senior Director, Strategic Projects*, Institutional Limited Partners Association (ILPA)

9:00am - 9:55am | GP Think Tank (Invitation-only)

- How detailed should an ESG policy be?
- How do you use your policy to drive ESG integration across your investments?

9:55am - 10:10am | PEI Welcome & Chairman's Opening Remarks - Pre-recorded

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

10:15am - 10:50am | Keynote fireside chat

Moderator: Jordan Stutts, *Senior Writer for Private Markets*, PEI Media

Keynote Speaker: Chavon Sutton, *Senior Investment Director, Sustainable & Impact Investing Research*, Cambridge Associates

10:55am – 11:45am | Keynote institutional investor roundtable discussion

Moderator:

Panelists:

- Angela Miller-May, *Chief Investment Officer*, Chicago Teachers' Pension Fund

11:45am – 12:00pm | Morning Networking Break

12:05pm – 12:55pm | Delivering social and environmental impact in the healthcare sector

- In the wake of the coronavirus crisis, what do you consider to be the greatest ESG challenge facing the healthcare sector today?
- What are your LPs and other stakeholders asking for in the case of funds dedicated to healthcare?
- Emerging opportunities in healthcare
- Impact investing in healthcare and measuring impact

Panelists:

- Jim Pieri, *Managing Partner, Chief Investment Officer*, Assured Healthcare Partners

1:00pm – 1:50pm | Good Sustainability Reporting

How you can improve sustainability reporting and disclosure on Environmental, Social, and Governance issues in an evolving landscape.

Panelists:

- Keren Raz, *Sr. Responsible Investment and Governance Specialist, Global Responsible Investment and Governance Team*, APG Asset Management
- Candice Richards, *Compliance Officer*, MidOcean Partners

1:50pm - 2:05pm | Afternoon Networking Break

2:10pm - 2:45pm | Spotlight discussion: impact investing with apollo global management

Moderator: Dan Mistler, *Partner, Head of ESG Services*, ACA Compliance

Panelists:

- Marc Becker, *Senior Partner and Co-lead of Impact, Private Equity*, Apollo Global Management
- Lisa Hall, *Impact Chairperson, Private Equity*, Apollo Global Management
- Joanna Reiss, *Partner and Co-lead of Impact, Private Equity*, Apollo Global Management

2:50pm - 3:40pm | Breakout Series

- **Track A | responsible investing for real estate investors**

Moderator: Ada Arevalo, *Founder & CEO*, iimpact capital

Panelists:

- David Natt, *Senior Vice President Asset Manager*, Avanath Capital Management
- Arturo Sneider, *Partner*, Primestor

- **Track B | ESG in private debt**

A forward-looking conversation discussing sourcing/screening and monitoring/engagement.

Moderator: Chase Jordan, *Vice President*, Malk Partners

Panelists:

- Adam Heltzer, *Head of ESG*, Ares Capital Management
- Kristina Matthews, *Managing Director, Head of Investor Relations & ESG*, Brightwood Capital Advisors

- **Track C | Sustainable Infrastructure investing**

- Laying the foundations for sustainable infrastructure investing
- Sustainable and inclusive recovery
- How can infra investors contribute to SDG outcomes?

Moderator: Dan Winters, *Head of Americas*, GRESB

Panelists:

- Alfred Griffin, *President*, NY Green Bank
- Samuel J. Lissner, *Principal*, Ridgewood Infrastructure
- Jim Pass, *Senior Managing Director*, Guggenheim Partners
- Cassie Winn, *Executive Director, Infrastructure Investments Group*, J.P. Morgan Asset Management

3:40pm – 3:50pm | Networking Break

3:50pm – 4:30pm | Environmental, Social, and Governance Integration

Effectively incorporating ESG factors into the investment underwriting process.

Moderator: Robert Jenkins, *Global Head of Research*, Refinitiv

Panelists:

- Michael Cappucci, *Managing Director for Compliance and Sustainable Investing*, Harvard Management Company (HMC)
- William Campbell, *General Counsel*, I Squared Capital Advisors
- Amy O'Brien, *Head of Responsible Investing*, Nuveen

4:35pm – 5:15pm | Impact: Clean, renewable & sustainable energy investments

- Will the Biden administration boost sustainable investment?
- Low carbon opportunities and climate change risks
- What are the current obstacles to growth in core renewables? What are the growth areas outside of core renewables?
- Combating Climate Change

March 4th | Day 2

9:00am - 9:55am | Women's Roundtable (Invitation-only)

How does investing with a gender lens impact our social and economic future?

9:55am - 10:00am | PEI Welcome -Pre-recorded

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

10:00am – 10:35am | Opening keynote leadership discussion | Corporate Governance

10:40am – 11:30am | Emerging opportunities in impact investing

- Raising capital for impact
- Understanding how to effectively measure and manage impact
- Where in the market do you see the biggest potential opportunity – climate/carbon solutions, fintech/wealth inequality, education, healthcare, others?

Moderator: Meg Lentz, *Vice President*, Malk Partners

Panelists:

- Mark Berryman, *Managing Director, Impact Investing*, Caprock
- Antonio Marquez, *Managing Partner & Founding Principal*, Comunidad Partners
- Megan Starr, *Global Head of Impact*, The Carlyle Group
- Julia Wittlin, CFA, CAIA, FRM, *Managing Director and Senior Portfolio Manager*, BlackRock Private Equity Partners (PEP)

11:30am – 11:45am | Morning Networking Break

Breakout Series | 11:50am – 12:40pm

- **Track A: Responsible agriculture investment strategies**

Panelists:

- Matthew Hershenson, *Head of Investor Relations*, Paine Schwartz
- Allison L. Spector, *Director of Responsible Investment, Real Assets and Private Markets*, Nuveen

- **Track B: The Impact of Covid-19 on Logistics and Supply Chain**

- Have we become too tight on logistics and supply chain?
- Looking at how we move goods and services around the world, from a US perspective where there be a return to that globalization?
- Managing ESG risk in the supply chains of private companies and assets

Panelists:

- Dean Alborough, *Head of ESG*, Old Mutual Alternative Investments (OMAI)

12:45pm - 1:35pm | Driving diversity for better results

Diversity & inclusion are a business imperative.

1:40pm – 2:30pm | Environmental Justice

Has ESG proven effective so far in making an impact? And is ESG saving the planet for everybody?

Panelists:

- Dr. Michael K. Dorsey, *CEO & Co-Founder, Around the Corner Capital (USA), Managing Director, IberSun (Spain) & LP Pahal Solar*
- Andrew Rodriguez, *CEO & Chief Investment Officer, Change Finance*

2:45pm – 3:30pm | How to use impact and ESG data to drive value creation

Moderator: Kirk Hourdajian, *Head of ESG & Impact, Vista Equity Partners*