

RI Canada

Building Momentum for a Just Transition in Canada

Chelsea Hotel – Toronto

18-19 October 2022

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The 3rd RI Canada conference brings together leading public market investors, banks, pension funds, insurers and financial regulators to pave the way to a sustainable, net-zero economy.

The agenda will explore what strides are being taken by Canadian institutions on a range of emerging ESG innovations, investment opportunities and showcase best in class strategies.

The content will address such topics as climate and decarbonisation strategies, mitigating the transition risk for real assets, digesting disclosure and regulatory developments for reporting, the rise of social performance in ESG efforts and the application of the Just Transition concept to ensure the pivot to a more sustainable economy is inclusive, equitable and fair.

Previous Attendees Include

BCI, CDPQ, CIBC Asset Management, CPPIB, Credit Suisse, Daiwa Capital Markets, Desjardins, DWS, European Investment Bank, First Sentier Investors, Future Fund, Government of Alberta, HSBC Bank Canada, Ivanhoe Cambridge, Manulife, Mercer, NEI Investments, OTPP, PSP, Scotia Bank

Confirmed speakers:

1. Senator Rosa Galvez, Senator, Quebec
2. Tariq Fancy, Founder & CEO, **The Rumie Initiative**
3. Rachel Horwat, Senior Manager, Sustainability, **Ivanhoé Cambridge**
4. Vincent Felteau, Senior Director, Responsible Investment, Private Markets, **PSP Investments**
5. Tomas Dauden, Principal - Responsible Investing, **OTPP**
6. Rosa van den Beemt, Vice President of Stewardship, Responsible Investment, **BMO Asset Management**
7. Pamela Steer, President & CEO, **CPA Canada**
8. Olaf Weber, Professor & University Research Chair, **University of Waterloo**
9. Lesley Marks, Chief Investment Officer, Equities, **Mackenzie Investments**
10. Karen Lockridge, Director, ESG Investing, **Canada Post Corporation Pension Plan**
11. Amy Hepburn, CEO, **Investor Leadership Network (ILN)**
12. Anne-Marie Gagnon, Manager, ESG - Public Markets, **BCI**
13. Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**
14. Tsering Yangki, Head of Real Estate Finance and Development, **Dream Unlimited Corp., Dream Impact Trust & Dream Office REIT**
15. Katherine Tweedie, Managing Director, **Ninety One Canada**
16. Kevin Thomas, Chief Executive Officer, **SHARE**
17. Belissa Rojas, Impact Measurement & Management Lead, SDG Impact Team, **UNDP**
18. Sarah Takaki, Head of Sustainable Investing, **Healthcare of Ontario Pension Plan**
19. Priti Shokeen, Vice President & Director, **TD Asset Management**
20. Andrew Brenner, Director of Investment Management Integration, **Value Reporting Foundation**
21. Adam Scott, Executive Director, **Shift: Action for Pension Wealth and Planet Health**
22. Matt Price, Director of Corporate Engagement, **Investors for Paris Compliance**
23. Maggie Childe, Head of Sustainable Investing, **iA Financial Group**
24. Mark Podlasly, Director of Economic Policy and Initiatives, **First Nation Major Projects Coalition**
25. Catherine Isabelle, Senior Director, Responsible Investment, **PSP Investments**
26. Franca Wolf, Senior Analyst, **Verisk Maplecroft**
27. Shweta Arya, Sustainable Investing and Innovation, **OPTrust**
28. Truzaar Dordi, Post-Doctoral Fellow & Vice President, **University of Victoria & Canadian Society for Ecological Economics**
29. Sarah Keyes, CPA, CA, CEO, **ESG Global Advisors**
30. Katharine Preston, Vice President, Sustainable Investing, **OMERS**
31. Bonnie Foley-Wong, Sustainable Investment Leader, **Mercer Canada**
32. Joseph Bastien, Project Manager, Reconciliation and Responsible Investment Initiative, **SHARE**
33. Heather Tremain, Chief Executive Officer, **Options For Homes**
34. Julie Segal, Senior Program Manager, Climate Finance, **Environmental Defence**
35. Garth Davis, Managing Partner, **New Market Funds**

36. Richard Brooks, Climate Finance Director, **Stand Earth**
37. Samantha Hill, Managing Director, Sustainable Investing, **CPPIB**
38. Sean Cleary, Chair, **Institute for Sustainable Finance**
39. Catherine McCall, Executive Director, **Canadian Coalition for Good Governance (CCGG)**
40. **Transition Accelerator**, speaker TBC
41. Catherine Simard, Senior Director, Sustainable Investing, **CDPQ**
42. Susan Golyak, Senior Manager, ESG - Public Markets, **BCI**
43. Lindsey Walton, Head of Canada, **UN PRI**
44. Hyewon Kong, Vice President, Head of Responsible Investing, **Investment Management Corporation of Ontario (IMCO)**
45. Mark Prystupa, General Manager, Indigenous and Community Relations, **Suncor**
46. David Isaac, President, **W Dusk Energy Group**
47. Ellen Quigley, Senior Research Associate, Climate Risk & Sustainable Finance, **Centre for the Study of Existential Risk (CSER)** and Special Adviser (Responsible Investment) to the Chief Financial Officer, **University of Cambridge**
48. Jennifer Stevenson, Vice President and Portfolio Manager, **Dynamic**
49. Solène Hanquier, ESG Strategies Leader, **Desjardins Global Asset Management**
50. Lauren Muusse, Investor Engagement Lead, **World Benchmarking Alliance**
51. Bill Young, Founder, **Social Capital Partners**
52. Tom Campos, Head of Sustainable Investment, Americas, **FTSE Russell**
53. Bruce Simpson, Senior Advisor ESG to multiple companies
54. Monika Freyman, Vice-President, Sustainable Investing, **Addenda Capital**
55. Jim Walker, Partner, **Align3 Capital Partners**
56. Sofía Condés, Senior Investor Outreach Manager, **FAIRR Initiative**
57. Luke O'Brien, Director, Financial Services, **Persefoni**
58. Lisa Williams, Senior Vice-President, Strategy, **Canada Mortgage and Housing Corporation (CMHC)**
59. Karen Restoule, CEO, **Shared Value Solutions**
60. Sarah Couturier-Tanoh, Manager Corporate Engagement and Shareholder Advocacy (ESG), **SHARE**
61. Mona Naqvi, Global Head of Capital Markets Strategy, **S&P Global Sustainable1**
62. Ayman Chowdhury, Head of Secretariat, **Global Compact Network Canada**
63. David Bennell, Principal, **VCA LLC**
64. Meagan Barrera, North America Researcher & Representative, **Business and Human Rights Resource Centre**
65. Stephanie Emond, Chief Impact Officer, **FinDev Canada**
66. Michela Gregory, Director, Environmental, Social and Governance (ESG) Services, **NEI Investments**
67. Clarisse Thornton, Senior Biodiversity Specialist, ESG Policy, **Export Development Canada (EDC)**
68. Alexandria Fisher, Sustainable Finance Manager, **Global Risk Institute**
69. John Rizio-Hamilton, Partner, **Bernstein Litowitz Berger & Grossmann LLP**
70. Francisca Quinn, President + CEO, **Quinn + Partners**
71. Pratima Divgi, Head of Capital Markets, **CDP**
72. Mark Van Clieaf, Managing Director, **FutureZero**
73. Katie Wheatley, Head of Canada, Signatory Relations, **UNPRI**
74. Jim Clayton, Ph.D, Director, **Brookfield Centre in Real Estate & Infrastructure York University**
75. Bonnie Foley-Wong, Sustainable Investment Leader, **Mercer Canada**

76. Edo Schets, Head of Climate for Sustainable Finance Solutions, **Bloomberg**
77. Lisa Eichler, Director Strategy & Markets Climate & ESG Solutions, **Ortec Finance**
78. Andrea Nemtin, Executive Director, **Social Innovation Canada**
79. Heather Mak, Co-founder, **Diversity in Sustainability**
80. Bryan Murphy, Head of Finance and CFO, **Biome Renewables**
81. James Wolf, Vice President Finance, **ARC Clean Technology**

Draft agenda

Day one – Tuesday 18th October

08:00 Registration

08:50 Welcome remarks from Responsible Investor

8.55 Chair's opening remarks

Ayman Chowdhury, Head of Secretariat, **Global Compact Network Canada**

09:00 Keynote panel: Can ESG investing in its current guise change the world?

- Is ESG fit for purpose?
- Is the incrementalism of ESG investing sufficient to address the challenges facing society?
- Can we rely on voluntary compliance to ensure 'stakeholder capitalism' takes root?
- What examples can we point to of genuinely transformative ideas in the market?
- How can Canada become in leader in the transition to a sustainable economy, at home and overseas?
- What are the opportunities for Canadian investors and corporations in bringing on a Just Transition and net zero future?

Tariq Fancy, Founder & CEO, **The Rumie Initiative**

Bruce Simpson, Senior Advisor ESG to multiple companies

John Rizio-Hamilton, Partner, **Bernstein Litowitz Berger & Grossmann LLP**

Moderated by Mona Naqvi, Global Head of Capital Markets Strategy, **S&P Global Sustainable1**

10.00 The initiatives that are moving the needle for sustainability in Canada

- Sustainable Finance Action Council: integrating sustainable finance into standard industry practices
- The Net-Zero Advisory Body: identifying pathways to help Canada achieve net-zero emissions by 2050
- Climate Engagement Canada: finance leaders driving Canada's transition to net zero
- Update on other initiatives

Kevin Thomas, Chief Executive Officer, **SHARE**

Andrew Brenner, Director of Investment Management Integration, **Value Reporting Foundation**

Sarah Takaki, Head of Sustainable Investing, **Healthcare of Ontario Pension Plan**
Monika Freyman, Vice-President, Sustainable Investing, **Addenda Capital**

Moderated by Gina Gambetta, Reporter, **Responsible Investor**

10:45 Coffee & networking

11:15 **Keynote interview: The importance of aligning the Canadian financial sector with climate commitments**

Senator Rosa Galvez, Senator, **Quebec**

In conversation with Gina Gambetta, Reporter, Responsible Investor

11:45 **Engagement, divestment and beyond: How should Canada's investors & financial institutions engage with its natural resource companies?**

- What is investor sentiment in engaging with oil and gas companies?
- What is the landscape of investment opportunities in climate tech and sustainable energy?
- How are investors supporting and deploying capital in climate solution?
- Is divestment about exiting oil and gas or reducing carbon risk?
- How are investors working with corporates on ESG plans?

Olaf Weber, Professor & University Research Chair, **University of Waterloo**

Priti Shokeen, Vice President & Director, **TD Asset Management**

Truzaar Dordi, Post-Doctoral Fellow & Vice President, **University of Victoria & Canadian Society for Ecological Economics**

Rosa van den Beemt, Vice President of Stewardship, Responsible Investment, **BMO Asset Management**

Moderated by Karen Restoule, CEO, **Shared Value Solutions**

12:30 **Progress to ESG disclosure standardisation**

- How have disclosure initiatives such as the International Sustainability Standards Board (ISSB) and the Taskforce on Nature-related Financial Disclosures (TNFD) progressed?
- Will we ever reach a precise 'financial reporting' standard on sustainability?
- How far along is progress to harmonising ESG measurement methodologies?
- What frameworks are leading companies using to demonstrate their ESG risk and performance?
- How will ESG data methodology develop in the next 5 years as the practice matures & where is innovation still required?

Samantha Hill, Managing Director, Sustainable Investing, **CPPIB**

Hyewon Kong, Vice President, Head of Responsible Investing, **Investment Management Corporation of Ontario (IMCO)**

Pamela Steer, President & CEO, **CPA Canada**

Moderated by Katherine Short, Associate Director, Sustainable Investing, **OMERS**

1:15 Lunch

Stream A	Stream B
<p>2:30 – Overview of leading climate and decarbonisation strategies</p> <ul style="list-style-type: none"> • What policies are leading institutions implementing as part of their decarbonisation plans? • What are the most common challenges and headaches in implementing a net zero strategy? • How is progress towards net zero being incentivised? • How are companies with a net zero commitment going about operationalising this aspiration? • What role should carbon offsets have as part of a net zero investment strategy? <p><i>Moderator:</i> Katherine Tweedie, Managing Director, Ninety One Canada</p> <p>Shweta Arya, Sustainable Investing and Innovation, OPTrust</p> <p>Richard Brooks, Climate Finance Director, Stand Earth</p> <p>Karen Lockridge, Director, ESG Investing, Canada Post Corporation Pension Plan</p> <p>Tom Campos, Head of Sustainable Investment, Americas, FTSE Russell</p>	<p>2:30 – Addressing human rights in the portfolio</p> <ul style="list-style-type: none"> • How are investors mapping their exposure to human rights abuses? • How are investors engaging with corporates on human rights? • What policies and practices are leading corporates implementing to protect human rights within their sphere of influence? • How can financial institutions get a handle on their exposure to child and forced labor, and modern-day slavery? <p><i>Moderator:</i> Ayman Chowdhury, Head of Secretariat, Global Compact Network Canada</p> <p>Sarah Couturier-Tanoh, Manager Corporate Engagement and Shareholder Advocacy (ESG), SHARE</p> <p>Meagan Barrera, North America Researcher & Representative, Business and Human Rights Resource Centre</p> <p>Michela Gregory, Director, Environmental, Social and Governance (ESG) Services, NEI Investments</p>
<p>3:10 Short break</p>	
<p>3.20 - Quantifying and managing climate risk in private markets</p> <ul style="list-style-type: none"> • How mature is climate risk management as a practice across the financial sector? • How is climate risk being integrated into investment decision-making? • How are different financial institutions measuring climate risk to their business, operations and assets? 	<p>3.20 - Investment and financing opportunities for climate tech</p> <ul style="list-style-type: none"> • What are the best examples of climate transition investments in Canada? • Which technologies are game-changing in the clean economy transition? • To what extent will institutional investors need to take on VC-type risk to gain exposure to support emerging climate technologies?

<ul style="list-style-type: none"> • What steps can be taken to mitigate negative climate-related impacts to an investment strategy? <p>Moderator: Pratima Divgi, Head of Capital Markets, CDP</p> <p>Rachel Horwat, Director, Decarbonization and Climate Change, Sustainable Investment, Ivanhoé Cambridge</p> <p>Tomas Dauden, Principal - Responsible Investing, OTPP</p> <p>Vincent Felteau, Senior Director, Responsible Investment, Private Markets, PSP Investments</p> <p>Luke O'Brien, Director, Financial Services, Persefoni</p>	<ul style="list-style-type: none"> • How mature are hydrogen and carbon capture and storage businesses? <p>Moderator: Francisca Quinn, President + CEO, Quinn + Partners</p> <p>David Isaac, President, W Dusk Energy Group</p> <p>David Bennell, Principal, VCA LLC</p> <p>Bryan Murphy, Head of Finance and CFO, Biome Renewables</p> <p>James Wolf, Vice President Finance, ARC Clean Technology</p>
<p>4:00 Short break</p>	
<p>4:15 - Climate transition scenario analysis</p> <ul style="list-style-type: none"> • Update on the work of Bank of Canada and the Office of the Superintendent of Financial Institutions (OSFI) • Capturing climate risks to the economy and financial system • Considering other risks including physical risk and interaction between physical and transition risks <p>Moderator: Sarah Keyes, CEO, ESG Global Advisors</p> <p>Julie Segal, Senior Program Manager, Climate Finance, Environmental Defence</p> <p>Mark Van Cleef, Managing Director, FutureZero</p> <p>Edo Schets, Head of Climate for Sustainable Finance Solutions, Bloomberg</p> <p>Lisa Eichler, Director Strategy & Markets Climate & ESG Solutions, Ortec Finance</p>	<p>4:15 - Future of biodiversity in investment portfolios</p> <ul style="list-style-type: none"> • With COP15 coming up in Montreal, what role can investors play in addressing biodiversity loss? • How can investors manage biodiversity risk in the portfolio? • Are current methodologies for identifying portfolio exposure to biodiversity risks fit for purpose? • Where are the investible opportunities for public markets investors in nature protection and restoration? <p>Moderator: Katie Wheatley, Head of Canada, Signatory Relations, UNPRI</p> <p>Maggie Childe, Head of Sustainable Investing, iA Financial Group</p> <p>Sofía Condés, Senior Investor Outreach Manager, FAIRR Initiative</p> <p>Clarisse Thornton, Senior Biodiversity Specialist, ESG Policy, Export Development Canada</p>

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5:00 Networking drinks

6.00 End of day one

Day Two – Wednesday 19th October

8.55 Day two chair’s opening remarks

Julie Segal, Senior Program Manager, Climate Finance, **Environmental Defence**

9:00 Interactive roundtable discussions

1. Practical steps to getting to net-zero - *Rachel Horwat, Director, Decarbonization and Climate Change, Sustainable Investment, **Ivanhoé Cambridge***
2. How ESG practitioners can influence senior management - *Katherine Short, Associate Director, Sustainable Investing, **OMERS***
3. Developing social performance within an ESG strategy - *Mark Podlasly, Director of Economic Policy and Initiatives, **First Nation Major Projects Coalition***
4. Responsible investment in fixed income - *Anne-Marie Gagnon, Manager, ESG - Public Markets, **BCI***
5. Unpacking financial leverage and human rights in value chains - *Lauren Muusse, Investor Engagement Lead, **World Benchmarking Alliance***
6. Topic TBC - *Lindsey Walton, Head of Americas, **UN PRI***
7. Environmental Justice in RI: Inter-generational & International - *Julie Segal, Senior Program Manager, Climate Finance, **Environmental Defence***

Stream A	Stream B
<p>10:15 - Utilising ESG data to enhance investment strategy</p> <ul style="list-style-type: none"> • Comparing ESG data for public and private companies • Why a comprehensive approach assesses data across the E, S & G • Where are conventional ESG datasets missing the full picture? • How can investors make the most of new sources of information: geospatial data, artificial intelligence, big data? • How are investor requests changing on data? • To what extent is ESG data a source of alpha? 	<p>10:15 - How should pension plans engage with their members on ESG?</p> <ul style="list-style-type: none"> • To what extent should beneficiaries have a voice on sustainable investments? • How and at what stage should beneficiaries be involved • What is holding back the democratization of sustainable investment strategy? • Comparing Canada to Europe and the rest of the world on this • To what extent is beneficiary activism a growing trend and a concern for pension plans? <p>Moderator: Andrea Nemtin, Executive Director, Social Innovation Canada</p>

<p>Moderator: Lauren Muusse, Investor Engagement Lead, World Benchmarking Alliance</p> <p>Sean Cleary, Chair, Institute for Sustainable Finance</p> <p>Franca Wolf, Senior Analyst, Verisk Maplecroft</p> <p>Catherine Isabelle, Senior Director, Responsible Investment, PSP Investments</p>	<p>Adam Scott, Executive Director, Shift: Action for Pension Wealth and Planet Health</p> <p>Bill Young, Founder, Social Capital Partners</p> <p>Amy Hepburn, CEO, Investor Leadership Network (ILN)</p>
<p>11.00 Break</p>	
<p>11:30 - Including Indigenous Peoples in a just transition</p> <ul style="list-style-type: none"> • What does a just transition mean for indigenous communities in Canada? • Co-investment opportunities with indigenous communities • What will be the consequences of the adoption of Bill C-15? <p>Moderator: Karen Restoule, CEO, Shared Value Solutions</p> <p>Mark Prystupa, Director Indigenous and Community Relations, Suncor</p> <p>Joseph Bastien, Project Manager, Reconciliation and Responsible Investment Initiative, SHARE</p> <p>Mark Podlasly, Director of Economic Policy and Initiatives, First Nation Major Projects Coalition</p>	<p>11:30 - The rise of sustainability-linked financing solutions</p> <ul style="list-style-type: none"> • Are Canadian banks creating credible ESG incentives to their borrowers? • What are some of the more innovative models being applied in the market by Canadian institutions? • To what extent are sustainability finance solutions able to move the needle on SDG achievement? • What is the role of ‘catalytic’ subsidised capital in blended financing structures for nascent technologies? <p>Moderator: Alexandria Fisher, Sustainable Finance Manager, Global Risk Institute</p> <p>Anne-Marie Gagnon, Manager, ESG - Public Markets, BCI</p> <p>Matt Price, Director of Corporate Engagement, Investors for Paris Compliance</p>
<p>12.15 - Social impact in Canadian real estate</p> <ul style="list-style-type: none"> • How can social considerations be leveraged for value creation in real estate? • What are the best examples of different housing impact investments such as affordable housing, supported housing and highly adapted housing? 	<p>12.15 - Pushing sustainability in public companies: governance, lobbying and voting strategies</p> <ul style="list-style-type: none"> • How are leading public equities investors going about driving sustainability in their portfolios? • To what extent are we seeing credible incentives on ESG performance being tied to executive pay in?

<ul style="list-style-type: none"> • What are the revenue models supporting sustainable housing projects and how viable are they? • What opportunities exist for collaboration with indigenous peoples in ownership and development of real estate projects? <p>Moderator: Jim Clayton, Ph.D, Director, Brookfield Centre in Real Estate & Infrastructure York University</p> <p>Garth Davis, Managing Partner, New Market Funds</p> <p>Tsering Yangki, Head of Real Estate Finance and Development, Dream Unlimited Corp., Dream Impact Trust & Dream Office REIT</p> <p>Heather Tremain, Chief Executive Officer, Options For Homes</p> <p>Lisa Williams, Senior Vice-President, Strategy, Canada Mortgage and Housing Corporation (CMHC)</p>	<ul style="list-style-type: none"> • How are investors influencing public companies through their voting strategy? • To what extent will voting against specific directors be a trend in the future as a tool of influence? <p>Moderator: Sofia Condés, Senior Investor Outreach Manager, FAIRR Initiative</p> <p>Catherine Simard, Senior Director, Sustainable Investing, CDPQ</p> <p>Catherine McCall, Executive Director, Canadian Coalition for Good Governance (CCGG)</p> <p>Lesley Marks, Chief Investment Officer, Equities, Mackenzie Investments</p> <p>Jennifer Stevenson, Vice President and Portfolio Manager, Dynamic Funds</p>
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1.00 Lunch

2.00 Investors' views on impact investing

- Can impact be achieved through public markets?
- How are Canadian institutional investors viewing the proliferation of impact funds around the world?
- What are the main concerns of institutional investors when assessing whether to invest into impact?
- What are the best examples of impact funds and how are they deploying capital in Canada?
- How are investors, especially pension funds, considering the potential conflict of interest with returns-first investment mandates?

Belissa Rojas, Impact Measurement & Management Lead, SDG Impact Team, **UNDP**

Jamie Cooper, Portfolio Manager, **Dream Impact Fund, Dream Unlimited Corp.**

Ellen Quigley, Senior Research Associate, Climate Risk & Sustainable Finance, **Centre for the Study of Existential Risk (CSER)** and Special Adviser (Responsible Investment) to the Chief Financial Officer, **University of Cambridge**

Jim Walker, Partner, **Align3 Capital Partners**

Moderated by Stephanie Emond, Chief Impact Officer, **FinDev Canada**

2.45 Cutting through the froth: how well is Canada addressing diversity and inclusion within its institutions?

- How much progress has been made by corporate Canada in all forms of diversity?
- To what extent are investors pressuring companies? Have they got their own house in order?
- Comparing Canada to other parts of the world in terms of DEI performance, momentum, and progress

Moderator: Lindsey Walton, Head of Americas, **UN PRI**

Susan Golyak, Senior Manager, ESG - Public Markets, **BCI**

Bonnie Foley-Wong, Sustainable Investment Leader, **Mercer Canada**

Solène Hanquier, ESG Strategies Leader, **Desjardins Global Asset Management**

Heather Mak, Co-founder, **Diversity in Sustainability**

3.30 End of conference