



responsible  
investor

RI Canada 2023

# RI Canada 2023 agenda

*Building Momentum for a Just Transition in Canada*

**Chelsea Hotel – Toronto | 17-18 October 2023**

## Day one – Tuesday 17<sup>th</sup> October

**8:00 Registration**

**8:45 Welcome remarks from Responsible Investor**

**8:50 Chair's opening remarks**

Bruce Simpson, Senior Advisor ESG to multiple companies

**8:55 Keynote 1**

Sarah Chapman, Global Chief Sustainability Officer, **Manulife**

**9:10 Plenary 1: Net zero: Challenges, opportunities, next steps**

- Three years on from the first net zero pledges, is implementation matching expectations?
- Will Canadian financial institutions be ready for the first round of interim targets?
- What are emerging as the key challenges around net zero in the Canadian market?
- Could net zero commitments hinder transition financing and the retirement of dirty assets?

**Moderator:** Bruce Simpson, Senior Advisor ESG to multiple companies

**Speakers:**

For program information:  
**Joana Frade**  
[joana.f@pei.group](mailto:joana.f@pei.group)

For sponsorship opportunities:  
**Claire Porter**  
[claire@pei.group](mailto:claire@pei.group)

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**Customer Services**  
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**PEI**

Joy Williams Executive Director, Financial Institution Net-zero Transition Plans, **GFANZ**  
Sarah Chapman, Global Chief Sustainability Officer, **Manulife**  
Brian Minns, Senior Managing Director, Responsible Investing, **University Pension Plan Ontario**

### **10:00 Plenary 2: Biodiversity: Protecting nature in investment portfolios**

- How to actualize KPIs from COP15
- TNFD's nature-based disclosure - Challenges and opportunities for investors
- Assessing the impact of biodiversity loss in the portfolio
- Reliable and consistent biodiversity data

**Moderator:** Gina Gambetta, Reporter, **Responsible Investor**

#### **Speakers:**

Marie de Montlaur, Senior Advisor Sustainability, **CDPQ**  
Puninda Thind, Finance Nature Lead, **The Climate Change High-Level Champions**  
Brandon Lewis, Director, Sustainability, **Manulife Investment Management**

10:50 *Networking break*

### **11:20 Keynote 2**

### **11:40 Plenary 3: International standard setting, taxonomies, and disclosures**

- Taking stock of the EU taxonomy and investor disclosure regulation
- Preparing for ISSB reporting: will investor expectations be met?
- Double materiality and meeting the EU's CSRD requirements
- To what extent is the regulatory push moving the needle on sustainable investment?

**Moderator:** Pratima Divgi, Head of Capital Markets, North America, **CDP**

#### **Speakers:**

Hyewon Kong, Vice President, Head of Responsible Investing, **(IMCO)**  
Michael Jantzi, Independent Review Committee on Standard Setting in Canada, **IFRS**

### **12:30 Plenary 4: Canadian regulatory and policy landscape**

- Status of Canada's taxonomy
- The role of the Canadian Sustainability Standards Board (CSSB)
- Expectations around CSA's climate disclosure proposals

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**Moderator:** Dustyn Lanz, Senior Advisor, **ESG Global Advisors**

**Speakers:**

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

Dan Byrd, ESG & Climate Industry Practice Lead, **Moody's**

13:20 *Lunch*

Stream A	Stream B
<p><b>14:20 – A1: What makes a credible corporate transition plan?</b></p> <ul style="list-style-type: none"><li>• How to assess transition plans?</li><li>• How to prepare and accomplish transition?</li><li>• What does it mean to be an existing oil and gas company?</li><li>• How to mitigate transition risks?</li></ul> <p><b>Moderator:</b> Stephanie Chow, Director, Climate Finance &amp; Strategy, <b>GFANZ</b></p> <p><b>Speakers:</b> Anne-Marie Gagnon, Senior Principal, ESG, Public Markets, <b>BCI</b> Andreas Ross, Head of New Product Research and Development, <b>ZAIS</b> Matt Christ, Portfolio Manager, <b>Ninety One</b></p>	<p><b>14:20 – B1: Modern slavery legislation: Mitigating forced labor in the supply chain</b></p> <ul style="list-style-type: none"><li>• Bill S-211 impact on the supply chain – How are institutions preparing/implementing?</li><li>• How have other jurisdictions implemented similar legislation? How does it compare?</li><li>• What are investors doing to mitigating forced labour regarding portfolio companies?</li></ul> <p><b>Speakers:</b> Kevin Thomas, CEO, <b>SHARE</b></p>
<p>15:05 <i>Networking Break</i></p>	
<p><b>15:15 – A2: ESG-labelled bonds: The next generation</b></p> <ul style="list-style-type: none"><li>• SLBs vs use-of-proceeds: which format is best suited to the Canadian market?</li><li>• Can nuclear become an accepted part of the green bond universe?</li></ul>	<p><b>15:15 – B2: Indigenous engagement and reconciliation in investment strategy</b></p> <ul style="list-style-type: none"><li>• How to adopt reconciliation principles into the portfolio?</li><li>• How are boards and asset managers implanting and</li></ul>

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<ul style="list-style-type: none"> <li>• How will biodiversity and nature feature in the next generation of ESG-labelled bonds?</li> <li>• Do transition bonds have a role to play in financing high-emitting sectors?</li> <li>• What greenwashing challenges will be thrown up by new bond formats and KPIs?</li> </ul> <p><b>Speakers:</b> Arthur Kwok, Vice President, Treasurer, <b>Ontario Power Generation</b></p>	<p>successfully bridging the gap of indigenous rights?</p> <ul style="list-style-type: none"> <li>• How to materialise support for the indigenous community?</li> <li>• Understanding and developing better business relationships</li> <li>• Navigating indigenous rights and growing demand for critical minerals in the transition</li> </ul> <p><b>Speakers:</b> James Jenkins, Executive Director, <b>Indigenous Clean Energy</b> <b>Raven Indigenous Impact</b> <b>Foundation</b> (speaker TBC) Eugene Kung, staff lawyer, <b>West Coast Environmental Law</b></p>
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16:00 *Networking Break*

<p><b>16:15 – A3: ESG data: New challenges, new solutions</b></p> <ul style="list-style-type: none"> <li>• What do upcoming disclosure regimes mean for data providers?</li> <li>• What would effective ESG data regulation look like?</li> <li>• Social to Scope 3: the next ESG data challenges</li> <li>• How can AI help ESG investing? What are the risks and opportunities of using emerging technologies?</li> </ul> <p><b>Moderator:</b> Sean Hackett, Senior Manager, Energy Transition, <b>EDF</b></p> <p><b>Speakers:</b> Bob Dannhauser, Senior Advisor, <b>Shift project</b></p>	<p><b>16:15 – B3: Nature-based solutions: Investing in biodiversity</b></p> <ul style="list-style-type: none"> <li>• Identifying opportunities to support nature</li> <li>• How can investors engage effectively with project managers?</li> <li>• Additionally, permanence, community buy-in: the must-haves for NBS</li> <li>• Addressing credibility challenges in the voluntary carbon markets</li> </ul> <p><b>Moderator:</b> Katie Wheatley, Head of Canada, <b>PRI</b></p> <p><b>Speakers:</b> Jackie Daitchman, Executive Director, ESG Client Coverage: Climate Application Specialist, <b>MSCI</b></p>
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17:00 Networking drinks

18:30 End of Day One

## Day Two – Wednesday 18<sup>th</sup> October

8:00 Registration and refreshments

8:55 Day two chair's opening remarks

9:00 Interactive roundtable discussions

1. **Blue Economy**

2. **Climate Litigation**

3. **Methane**

Sean Hackett, Senior Manager, Energy Transition, **EDF**

4. **Carbon removal**

10:00 Networking break

Stream A	Stream B
<p><b>10:15 – A4: Canada's banks and the green economy</b></p> <ul style="list-style-type: none"><li>• How have changing energy market dynamics affected sustainability thinking in the Canadian banking sector?</li><li>• Where could Canada's banks do more to support the green economy?</li><li>• Operationalizing net zero strategies</li><li>• How can investors engage effectively with banks on net zero and climate finance?</li><li>• Are Canada's banks ready to finance climate adaptation?</li></ul> <p><b>Speakers:</b></p>	<p><b>10:15 – B4: Tracking the evolution of proxy voting in Canada</b></p> <ul style="list-style-type: none"><li>• Key takeaways for investors from the 2023 proxy season</li><li>• What does the recent increase in ESG shareholder proposals mean for responsible investors?</li><li>• Will the publication of CEC's company benchmark encourage investors to file more shareholder proposals?</li><li>• Are Canadian investors building escalation pathways on director votes on ESG issues?</li></ul>

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<p>Kyra Bell-Pasht, Director of Research and Policy, <b>Investors 4 Paris</b></p>	<ul style="list-style-type: none"> <li>• Which issues are rising up the agenda in Canada in terms of proxy voting?</li> </ul> <p><b>Moderator:</b> Edd Micklem, VP of Investor Partnerships, <b>Tumelo</b></p> <p><b>Speakers:</b>  Delaney Greig, Director, Investor Stewardship, <b>University Pension Plan Ontario</b>  Alyson Slater, Managing Director, Sustainable Investment, <b>Manulife</b></p>
<p><b>11:00 – A5: Getting physical: How are investors evaluating and acting on rising physical climate risks?</b></p> <ul style="list-style-type: none"> <li>• Examples of the latest ways to assess and navigate climate-related physical risks</li> <li>• Physical risks in the Canadian context</li> <li>• Company data, scenarios and modelling</li> <li>• Has TCFD reporting helped move the needle?</li> </ul> <p><b>Speakers:</b>  Pierre-Luc Gilbert, Analyst, Climate Risk &amp; Sustainable Investment, <b>CDPQ</b>  Sophie Heald, Senior Climate Specialist, <b>Ortec Finance</b>  Moin Syed, Manager, Sustainable Investing, <b>OMERS</b></p>	<p><b>11:00 – B5: Infra ownership and responsibility for Canadian pension funds</b></p> <ul style="list-style-type: none"> <li>• Canadian pension funds are among the biggest infrastructure investors in the world – what does it mean to be a responsible owner of infrastructure globally?</li> <li>• Infrastructure and net zero – shifting and future-proofing non-green assets to align with the Paris Agreement</li> <li>• Canada’s response to US Inflation Reduction Act</li> </ul>
<p>11:45 <i>Networking Break</i></p>	
<p><b>12:00 – A6: Emerging markets: Blended finance and engagement</b></p>	<p><b>12:00 – B6: Diversity disclosure rules: Canada’s time to push the needle?</b></p>

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<ul style="list-style-type: none"> <li>• How are Canadian investors approaching stewardship in emerging markets?</li> <li>• What are the key barriers to financing climate resilience and mitigation in EM?</li> <li>• What role can Canada play in promoting mechanisms to support innovative finance?</li> <li>• Balancing the risks, opportunities and impact of blended finance structures</li> </ul> <p><b>Moderator:</b> Alain Longpré, Director, mobilization &amp; blended finance, <b>FinDev Canada</b></p> <p><b>Speakers:</b> Chris Clubb, Managing Director, <b>Convergence Blended Finance</b></p>	<ul style="list-style-type: none"> <li>• Could the CSA's proposed diversity disclosure rules make Canada world leading?</li> <li>• How do the two approaches proposed in the rule compare with other international measures?</li> <li>• How are investors getting their own house in order and engaging with portfolio companies on DEI?</li> </ul> <p><b>Speakers:</b> Adrian Mitchell, Head of public equities, <b>HOOP</b> Lindsey Walton, Director of Americas, <b>PRI</b></p>
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12:45 Lunch

### 13:35 Keynote 3

### 13:55 Plenary 5: Asset owner panel: Navigating ESG headwinds

- Has investing sustainably become more challenging for asset owners over the past two years?
- The impact of the war in Ukraine on how responsible investors manage and engage fossil fuel holdings
- Indigenous rights: Overcoming tick boxing and ensuring robust practice
- What is keeping senior leaders at asset owners up at night in 2023?

### 14:45 Plenary 6: Better together? Collective vs individual engagement

- What are the strengths and weaknesses of the two approaches?
- Progress on Climate Engagement Canada – will we see more national climate initiatives?

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- Effectiveness of Canadian Coalition for Good Governance's board engagement program
- How do investors select which initiatives to join?
- How are investors managing stewardship resources effectively to maximise impact

**Moderator:** Anthony Schein, Director of Shareholder Advocacy, **SHARE**

**Speakers:**

Catherine McCall, Executive Director, **Canadian Coalition for Good Governance (CCGG)**

Carmen Velasquez, Director, Responsible Investment, **Alberta Investment Management Corporation (AIMCo)**

**15:35 Chair's closing remarks**

**15:45 End of conference**

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