

Private Equity  
International

# Responsible Investment Forum

## San Francisco 2023

September 19-20 2023  
JW Marriott, San Francisco

**Committing to change, creating value,  
and driving growth**

**PEI**

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The Responsible Investment Forum returns to San Francisco for its second year in September. The number one North American ESG event focused on private markets will bring together over 250 institutional investors, fund managers and expert advisors to discuss the latest trends in sustainability.

[Responsible Investment Forum: San Francisco](#) →



*“The best conference I’ve attended in a very long time. A great opportunity to build your network of managers and institutional investors working on sustainability in private markets”*

Past event delegate of the **Responsible Investment Forum: San Francisco**



# Agenda highlights:

## How should heads of sustainability work with the investment team?

- » What does a good working relationship with the deal team look like?
- » Getting a seat at the table at each stage of the investment process
- » How to manage frictions with deal partners with other priorities?
- » Examples of sustainability heads influencing investment decisions

## LP & GP perspectives on solving the ESG data challenge

- » How are initiatives such as the data convergence initiative helping to solve the data challenge?
- » Are tech-focused managers based on the west-coast doing anything innovative on data?
- » Overcoming issues with sharing portfolio company data
- » Examples of GPs pushing back effectively on data to make the relationship more productive

## The continued evolution of ESG in Venture Capital

- » Is a more challenging fundraising environment causing LPs to put more pressure on VC's on ESG?
- » How important is the role of ESG governance in the success of venture firms?
- » To what extent is venture catching up with private equity?
- » Deep dive into the VC DDQ and what it means

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# Agenda highlights:



## Impact value creation toolbox: how to generate value from an impact strategy

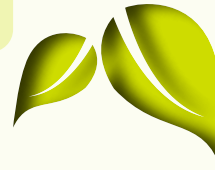
- » How is value creation different for impact funds to other PE strategies?
- » To what extent do value creation plans and impact creation plans need to be integrated?
- » How do PE and venture funds influence their portfolios?

## The intersection of technology, ESG, and social responsibility

- » Exploring how technology can address environmental challenges but create other issues
- » Examining the ethical implications of tech investments, including labor practices, diversity, etc.
- » The role of investors in shaping the tech industry's approach to sustainability

## Investor views on climate tech

- » Are investors comfortable with the risk/return on climate tech investments?
- » To what extent will institutional investors need to take on VC-type risk to gain exposure to support emerging climate technologies?

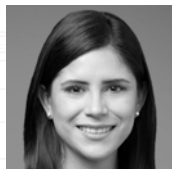


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# Hear from top responsible investment professionals:



**Brittany Agostino**  
ESG Lead for US Credit  
**Ares Management**



**Adriana Becerra Cid**  
Sustainable Investment  
Manager for Private Markets  
**Lombard Odier Asset  
Management**



**Eunice Chapon**  
Director of Operations and  
Business Development  
**BrightEdge/American  
Cancer Society**



**Melissa Cheong**  
Managing Director  
**Blackhorn Ventures**



**Ira Ehrenpreis**  
Managing Partner  
**DBL Partners**



**Peter Ellsworth**  
Senior Director  
**Ceres**



**Zomo Fisher**  
Head of Sustainability & ESG  
**Hellman & Friedman**



**July Giachetti**  
Senior Manager,  
Private Equity  
**PSP Investments**



**Mark Green**  
Senior Relationship  
Manager, US  
**UNPRI**



**Anup Jacob**  
Managing Partner  
**Activate Capital**

[View the full speaker list ↻](#)

# Hear from top responsible investment professionals:



**Justin Kulla**  
Partner of Impact Investing  
and Head of ESG  
**TZP Group**



**Steven Mandel**  
Partner  
**TPG Rise**



**Amanda Murphy**  
Strategic Account Executive  
**EcoVadis**



**Priya Prasad Bowe**  
Managing Director and  
Head of ESG  
**Oaktree Capital**



**Sanaz Raczynski**  
Managing Director,  
Sustainability  
**Kohlberg & Company**



**Dalia Rahman**  
ESG Specialist, Climate Lead  
**Apax Partners**



**Leola Ross**  
Deputy CIO and Head of  
ESG  
**Seattle City  
Employees'  
Retirement System**



**Katie Schmitz Eulitt**  
Director,  
Investor relationships  
**IFRS**



**Marlene Timberlake  
D'Adamo**  
Chief Diversity,  
Equity & Inclusion Officer  
**CalPERS**



**Monica Varman**  
Partner  
**G2 Venture Partners**

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# Networking opportunities available across the forum

# 1

## **Build your community of ESG professionals**

Network with institutional investors, fund managers, consultants, and highly recognized associations to explore opportunities in ESG.

# 2

## **Make use of our curated agenda with networking inbuilt**

Join your peers at interactive workshops and working groups, brand new case studies, networking breaks, an evening drinks reception, and invite only breakfasts.

# 3

## **Meet investors**

Past investors include 4AGP, AIMCo, CalPERS, New York State Common Retirement Fund, and many more.

# Who will you meet?

- » 4AGP
- » AE Industrial Partners
- » AEI HorizonX
- » Alpine Investors
- » Amasia
- » American Student Assistance
- » Apax Partners
- » Apex Fund Services
- » Apex Group
- » AQUILINE
- » ARA
- » BC Partners
- » BlackRock
- » Blue Owl Capital
- » BMO Family Office
- » CalPERS
- » Campbell Lutyens & Co
- » Capricorn Investment Group
- » Clarmondial
- » Comvest Partners
- » Cressey & Co
- » Crowe
- » EDF
- » Endeavour Capital
- » ERM
- » Ernst & Young
- » ESG Base
- » Fundamental Advisors
- » Galvanize Climate Solutions
- » Generation Investment Management
- » Georgian
- » Goldman Sachs
- » GTCR
- » Hamilton Lane
- » HarbourVest
- » Insight Partners
- » Jasper Ridge Partners
- » Khazanah Americas
- » Kirkland & Ellis
- » Kohlberg & Company
- » LaSalle Investment Management
- » Li Family Office
- » Malk Partners
- » Malk Sustainability Partners

## Sample of previous attending companies include:

- » Malloy and Company
- » MiddleGround Capital
- » MSCI
- » New Jersey Division of Investment
- » NGP Energy Capital
- » Nomura Asset Management
- » Nomura Funds Research And Technologies America
- » Novata
- » Oaktree Capital Management
- » ORIX Corporation USA
- » Persefoni
- » Phoenix Group
- » Platinum Equity
- » Principles for Responsible Investment
- » PSP Investments
- » QIC
- » Radiant ESG
- » Ramboll
- » Ropes & Gray
- » Russell Reynolds Associates
- » Sands Capital Management
- » Stepstone Group
- » Temasek International
- » The California Endowment
- » The Ecosystem Integrity Fund (“EIF”)
- » The Predistribution Initiative
- » The Riverside Co
- » The Vistria Group
- » The Westly Group
- » TowerBrook Capital Partners
- » True Green Capital
- » TZP Group
- » UNCDF
- » UNPRI
- » Vista Equity Partners Management
- » Vistria
- » Weinreb Group
- » Welton Investment Partners
- » Wilshire Associates
- » World Bank Group
- » Zouk Capital
- » and many more



# Current confirmed sponsors

Founding ESG sponsor

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Lead sponsor

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Sponsors

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For more information on available sponsorship opportunities please contact  
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# Responsible Investment Forum

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**WE SUPPORT**



As part of our commitment to sustainable and responsible business practices, PEI Group has embedded the Ten Principles of the United Nations Global Compact into strategies and operations, and committed to respecting human and labour rights, safeguarding the environment, and working against corruption in all its forms.