



responsible
investor

RI USA 2022

6-7 December
New York

RI USA 2022

Convene 117, W 46th Street, New York
6-7 December 2022

The Responsible Investor USA conference will provide insight into how leading organisations in the public market are implementing ESG and responsible investment strategies that deliver value and sustainable outcomes in the US market.

Debate with sustainably focused investors on current trends that are shaping the regional and global landscape, including updates on the challenges and opportunities in the continued journey towards net-zero, climate risk strategies, new disclosure rules, and the rise of proxy voting and engagement, set against a contentious backdrop of political division and the rise of anti-ESG sentiments.

The event comes at a critical time, coming off the back of COP27 and the mid-term elections, and looking ahead to COP15 and the year 2023. It is a must-attend for ESG, sustainable finance and responsible investment professionals in North America.

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2022 speakers

- Tobias Read, State Treasurer, State of Oregon
- Colleen Davis, State Treasurer, State of Delaware
- Marlene Timberlake D'Adamo, Chief Diversity, Equity and Inclusion Officer, CalPERS
- Pedro Guazo, Representative of the Secretary-General for the investment of assets, United Nations Joint Staff Pension Fund
- Ryan McQueeney, Analyst, Sustainable Investment Stewardship, Wespath Benefits and Investments
- Aeisha Mastagni, Portfolio Manager, Sustainable Investment & Stewardship Strategies, CalSTRS
- Kristina Wyatt, Deputy GC, SVP Global Regulatory Climate Disclosure, Persefoni, and Former Sr. Counsel for Climate and ESG, U.S. Securities and Exchange Commission (SEC)
- Gianna McCarthy, Director of Corporate Governance, Office of the New York State Comptroller
- Rob Schuwerk, Executive Director, North America, Carbon Tracker
- Heike Reichelt, Head of Investor Relations and Sustainable Finance, World Bank
- Andrew Neidhardt, Assistant Counsel, Office of the New York State Comptroller
- Matthew Illian, Director, Responsible Investing, United Church Funds
- Bennett Freeman, Associate Fellow, Chatham House and Former Senior Vice President, Calvert Investments
- Patrick O'Connell, EMIA's Chair of Private Sector Programs, Emerging Markets Investors Alliance
- Bertrand de Mazières, Director General for Finance, European Investment Bank

- Caroline Laberge, Director Sustainable Investing, CDPQ
- Samantha Hill, Managing Director, Sustainable Investing, CPP Investments
- Sam Jones, President & Co-Founder, Heartland Initiative
- Bella Tonkonogy, Director, Climate Policy Initiative
- Andrew Howell, Director of Investor Influence, Environmental Defense Fund (EDF)
- Lucy Fitzgeorge-Parker, Editor, Responsible Investor
- Steven Rothstein, Managing Director, Ceres Accelerator for Sustainable Capital Markets, Ceres
- Robert Eccles, Professor, Saïd Business School - University of Oxford
- Diana Kearney, Senior Legal and Shareholder Advocacy Advisor, Oxfam
- Shahnawaz Malik, CFA, Head of ESG, Long-Term Stock Exchange (LTSE)
- Heidi Welsh, Founding Executive Director, Sustainable Investments Institute (Si2)
- Josh Zinner, CEO, Interfaith Center on Corporate Responsibility (ICCR)
- Christa Clapp, Co-Founder and Managing Partner, CICERO Shades of Green
- Martina Macpherson, Head of ESG Product Management, SIX
- Anita Dorett, Director, Investor Alliance for Human Rights
- Carly Jacobs, Senior Specialist, Stewardship, Active Ownership 2.0, UNPRI
- Danielle Fugere, President & Chief Counsel, As You Sow
- Annie Chor Joyce, Managing Director, Head of ESG, Amundi US
- John Willis, Director of Research, Planet Tracker
- Eric Pedersen, Head of Responsible Investments, Nordea
- Mirtha Kastropeli, Sector Head for Consumer in Corporate Ratings, ISS ESG
- Tony Campos, Head of Sustainable Investment, Americas, FTSE Russell
- Faheen Allibhoy, Managing Director & Head of J.P. Morgan's Development Finance Institution (DFI), J.P. Morgan
- Hana Heineken, Senior Attorney, Climate Financial Strategies, Center for International Environmental Law (CIEL)
- Jean-Xavier Hecker, Co-Head of ESG & Sustainability Research, J.P. Morgan
- Lisa Eichler, Director Strategy & Markets, Climate & ESG Solutions, Ortec
- Patience Marime-Ball, Esq., Founder & CEO, Women of the World Endowment
- David Bennell, Strategic Advisor, Transformational Investing in Food Systems (TIFS)
- Dean Hand, Chief Research Officer, The Global Impact Investing Network (GIIN)
- Paul Verney, Senior Reporter, Responsible Investor
- Anna Totdahl, Investment Officer, ESG & Sustainability, Oregon State Treasury
- Isedua Oribhabor, Business and Human Rights Lead, Access Now
- Dave Jones, Director, Climate Risk Initiative, UC Berkeley School of Law's Center for Law, Energy & the Environment

- Cary Krosinsky, Co-Founder, Sustainable Finance Institute
- Paul Ellis, Host, Sustainable Finance Podcast
- Julie B. Tanner, Managing Director, Socially Responsible Investing, Catholic Responsible Investment Services (CBIS)
- Lisa Cox, Director, Catholic Responsible Investment Services
- Ruth Shaber, President & Founder, Tara Health Foundation
- Sarah Bryner, Director of Research and Strategy, OpenSecrets
- Lydia Harvey, Executive Director, ESG Specialist, J. P. Morgan
- Shelley Alpern, Director of Shareholder Advocacy, Rhia Ventures
- Michelle McCulloch, Head of ESG Ratings Americas, Sustainable Fitch
- Julia Giguere-Morello, Executive Director and Head of Americas Core ESG and Climate Research, MSCI
- Franca Wolf, Senior Analyst, Corporate Risk Analytics, Verisk Maplecroft
- Girish Narula, Head of Climate Transition Finance, ICE
- Mike Ilardi, Director of Business Development, The Climate Service
- Ivan Frishberg, Chief Sustainability Officer, Amalgamated Bank
- Florian Berg, Researcher, MIT Sloan School of Management
- Lindsay Ross, Director – Product Specialist, Moody's
- Mona Naqvi, Global Head of Capital Markets Strategy, S&P Global Sustainable1
- Maggie Dorn, Senior Director, Head of ESG Indices, North America, S&P DJI
- Sonja Gibbs, Board Member, ICVCM & Managing Director and Head of Sustainable Finance, Institute of International Finance
- Jan Ryzak, Company and Investor Engagement Manager, Ranking Digital Rights
- Richard Hewston, Director – Climate, Nature & Resilience Practice, Verisk Maplecroft
- Sofía De La Parra, Senior ESG Analyst, FAIRR Initiative
- Elizabeth Seeger, Board Member, International Sustainability Standards Board (ISSB), IFRS Foundation
- Bob Dannhauser, Senior Advisor, Shift Project
- Curtis Ravenel, Founding Member, FSB TCFD Secretariat and Senior Advisor, Glasgow Financial Alliance for Net Zero (GFANZ)
- Nicholas Pfaff, Deputy CEO and Head of Sustainable Finance, International Capital Market Association (ICMA)
- Cristian Norambuena, Director, Private Equity, Tikehau Capital
- Marcus Painter, Ph.D, Assistant Professor of Finance, Richard A. Chaifetz School of Business, Saint Louis University
- Bhavika Vyas, Managing Director, StepStone

- Keri Larkin, Founding Member, Greater Share
- Jesse Duncan, Program Officer, The Tipping Point Fund
- Fran Seegull, President, U.S. Impact Investing Alliance
- Carlos Portugal Gouvêa, Associate Professor, University of São Paulo Law School and Visiting Professor, Harvard Law School
- Rick Alexander, CEO, The Shareholder Commons
- Jérôme Tagger, CEO, Preventable Surprises
- Michaela Edwards, Partner, Capricorn Investment Group and the Sustainable Investment Fund
- Corinne Boone, Group Head, Americas, AirCarbon
- Bruce Simpson, Senior Advisor ESG to multiple companies
- Karen Kerschke, US ESG Policy Analyst, Principles for Responsible Investment (UN PRI)
- Carter Brandon, Senior Fellow, World Resources Institute (WRI)
- Campbell Moore, Carbon Markets Strategy Lead, Global Carbon Markets Team, The Nature Conservancy
- Vonda Brunsting, Program Manager, The Just Transition Project, Initiative for Responsible Investment, Harvard Kennedy School
- Amit Bando, Chief Economist and Senior Advisor for Just and Inclusive Economics, Ceres
- Julie Abrams, Senior Director, Investment Origination, NatureVest, The Nature Conservancy
- Jay Koh, Co-founder & Managing Director, The Lightsmith Group
- Stacy Swann, CEO & Founding Partner, CFA, Climate Finance Advisors
- Liesel Van Ast, Manager, United Nations Environment Programme Finance Initiative (UNEP FI)
- Lisa Bozzelli, Senior Director, Multifamily Capital Markets, Fannie Mae
- Pratima Divgi, Director, CDP North America

Day one – Tuesday 6th December

8:00 *Registration*

8:50 *Welcome remarks from Responsible Investor*

Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

9:00 **Keynote Address: Navigating the Evolving ESG Landscape**

Faheen Allibhoy, Managing Director & Head of J.P. Morgan's Development Finance Institution (DFI),
J.P. Morgan

9:30 **Towards net zero: Marking the finance industry's scorecard**

- *Two years on from the first net zero pledges, is implementation matching expectations?*
- *Which parts of the financial sector are emerging as leaders and laggards on net zero?*
- *Is sufficient progress being made on setting near-term targets?*
- *Is there a danger that net zero commitments prevent necessary funding of company transitions and the retirement of dirty assets?*

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

Pedro Guazo, Representative of the Secretary-General for the investment of assets, **United Nations Joint Staff Pension Fund**

Andrew Howell, Director of Investor Influence, **Environmental Defense Fund (EDF)**

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

Lindsay Ross, Director – Product Specialist, **Moody's**

10:20 **Navigating the political backlash against ESG**

- *How big a threat is the anti-ESG backlash to progress in the US?*
- *Can ESG become a non-partisan topic? If so, how and where is the common ground?*
- *Has the Inflation Reduction Act helped to shift the political debate on climate?*
- *Given the politicization of ESG, should corporate political influence – particularly at the state level – come under greater scrutiny by investors?*

Speakers:

Moderator: Steven Rothstein, Managing Director, Ceres Accelerator for Sustainable Capital Markets,
Ceres

Colleen Davis, State Treasurer, **State of Delaware**

Tobias Read, State Treasurer, **State of Oregon**

Robert Eccles, Professor, **Saïd Business School - University of Oxford**
Josh Zinner, CEO, **Interfaith Center on Corporate Responsibility (ICCR)**

11:10 *Networking break*

11.40 **What will the SEC's climate disclosure rules mean for the financial sector?**

- *Will the proposed climate disclosure rules meet the requirements of investors?*
- *Scope 3 emissions: mandatory requirement or laudable ambition?*
- *How will/should the SEC climate disclosure rules interact with the ISSB's standards?*
- *Human capital disclosure: what should the SEC consider as it updates this rule?*

Moderator: Marcus Painter, Ph.D, Assistant Professor of Finance, Richard A. Chaifetz School of Business, **Saint Louis University**

Aeisha Mastagni, Portfolio Manager, Sustainable Investment & Stewardship Strategies, **CalSTRS**

Rob Schuwerk, Executive Director, North America, **Carbon Tracker**

Julia Giguere-Morello, Executive Director and Head of Americas Core ESG and Climate Research, **MSCI**

Curtis Ravenel, Founding Member, FSB TCFD Secretariat and Senior Advisor, **Glasgow Financial Alliance for Net Zero (GFANZ)**

Kristina Wyatt, Deputy GC, SVP Global Regulatory Climate Disclosure, **Persefoni**, and Former Sr. Counsel for Climate and ESG, **U.S. Securities and Exchange Commission (SEC)**

12:35 **Integrating diversity, equity, and inclusion into investment decisions**

- *How are asset owners collaborating with asset managers to institutionalise and codify diversity across their portfolios?*
- *Civil Rights Audits: who is using them, and how are they being used?*
- *Are corporates leading on social matters? Have investors been vocal enough?*
- *Are we paying as much attention to social washing as we are to greenwashing?*

Moderator: Mirtha Kastropeli, Sector Head for Consumer in Corporate Ratings, **ISS ESG**

Matthew Illian, Director, Responsible Investing, **United Church Funds**

Gianna McCarthy, Director of Corporate Governance, **New York State Office of the Comptroller**



Patience Marime-Ball, Esq., Founder & CEO, **Women of the World Endowment**
Marlene Timberlake D’Adamo, Chief Diversity, Equity and Inclusion Officer, **CalPERS**

1:20 Lunch

Stream A <i>Climate risk</i>	Stream B <i>Data, ratings and reporting</i>	Stream C <i>Banking and capital markets</i>
<p>2:30 – Assessing corporate transition plans</p> <ul style="list-style-type: none"> • <i>How are investors assessing corporate transition plans? What are the hallmarks of credibility?</i> • <i>Should investors benchmark climate strategies of listed companies against other firms in the same sectors?</i> • <i>Should strategies be confirmed as science-based before they are endorsed by investors?</i> • <i>Are net zero pledges useful or do they give a false sense of progress?</i> <p>Moderator: Bruce Simpson, Senior Advisor ESG to multiple companies</p>	<p>2:30 – Exploring the global disclosure landscape</p> <ul style="list-style-type: none"> • <i>What are the strengths and weaknesses of the US climate disclosure rules compared with those being developed in the EU?</i> • <i>Interoperable or insoluble: how will the ISSB, CSRD and SEC rules interact?</i> • <i>What is the difference between an enterprise value approach and a ‘double materiality’ one in practice?</i> • <i>Will the developing disclosure landscape reduce the reporting burden on firms?</i> <p>Moderator: Paul Ellis, Host, Sustainable Finance Podcast Martina Macpherson, Head of ESG Product Management, SIX</p>	<p>2:30 – Growth and maturity of the ESG and the labelled bond market</p> <ul style="list-style-type: none"> • <i>What has a year of rising interest rates and other external pressures taught us about ESG and the labelled bond market?</i> • <i>How can investors, regulators and issuers ensure the quality of labelled debt as fears of greenwashing grow?</i> • <i>How are municipal issuers looking at ESG and the labelled bond market? Are municipal bonds suffering from a lack of third-party assurance?</i>



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<p>Eric Pedersen, Head of Responsible Investments, Nordea</p> <p>Samantha Hill, Managing Director, Sustainable Investing, CPP Investments</p> <p>Vonda Brunsting, Program Manager, The Just Transition Project, Initiative for Responsible Investment, Harvard Kennedy School</p>	<p>Jean-Xavier Hecker, Co-Head of ESG & Sustainability Research, J.P. Morgan Bank</p> <p>Elizabeth Seeger, Board Member, International Sustainability Standards Board (ISSB), IFRS Foundation</p>	<ul style="list-style-type: none"> • <i>How do we measure and evaluate the ambition of Sustainability-Linked Bonds (SLBs)?</i> • Moderator: Lucy Fitzgeorge-Parker, Editor, Responsible Investor <p>Heike Reichelt, Head of Investor Relations and Sustainable Finance, World Bank</p> <p>Lisa Bozzelli, Senior Director, Multifamily Capital Markets, Fannie Mae</p> <p>Christa Clapp, Co-Founder and Managing Partner, CICERO Shades of Green</p> <p>Nicholas Pfaff, Deputy CEO and Head of Sustainable Finance, International Capital Market Association (ICMA)</p>
<p>3:15 Networking break</p>		
<p>3:30 – Managing physical and transition risk to portfolios</p> <ul style="list-style-type: none"> • <i>Which is more challenging to assess in the context of portfolios, physical or transition risk?</i> 	<p>3:30 – The ESG ratings debate</p> <ul style="list-style-type: none"> • <i>Sustainability indices: understanding inherent contradictions and loopholes</i> • <i>Is there a case for mandatory disaggregation of ESG</i> 	<p>3:30 – Banking on net zero</p> <ul style="list-style-type: none"> • <i>How can investors encourage US banks to make more meaningful progress on net zero commitments?</i>



- *How do longer investment horizons affect the materiality of climate-related risks?*
- *How good is corporate disclosure on location of significant assets? How does this impact assessment of physical risk exposure?*
- *How will transition risks materialise, suddenly or gradually? How can investors prepare for them / model them?*

Moderator: Marcus Painter, Ph.D, Assistant Professor of Finance, **Richard A. Chaifetz School of Business, Saint Louis University**
 Dave Jones, Director, Climate Risk Initiative, **UC Berkeley School of Law's Center for Law, Energy & the Environment**
 Lisa Eichler, Director Strategy & Markets, Climate & ESG Solutions, **Ortec**
 Girish Narula, Head of Climate Transition Finance, **ICE**

ratings into their E, S and G components?

- *Should corporate political activity be part of ESG ratings assessments?*
- *What would effective ESG ratings regulation look like?*

Moderator: Florian Berg, Researcher, **MIT Sloan School of Management**
 Shahnawaz Malik, CFA, Head of ESG, **Long-Term Stock Exchange (LTSE)**
 Tony Campos, Head of Sustainable Investment, Americas, **FTSE Russell**
 Michelle McCulloch, Head of ESG Ratings Americas, **Sustainable Fitch**
 Maggie Dorn, Senior Director, Head of ESG Indices, North America, **S&P DJI**

- *How should investors assess banks' net zero strategies and methodologies?*
- *What will a national green bank mean for the US banking sector?*
- *Is it realistic to expect banks to take the lead on ending fossil fuel funding?*

Moderator: Pratima Divgi, Director, CDP North America
 Danielle Fugere, President & Chief Counsel, **As You Sow**
 Bertrand de Mazières, Director General for Finance, **European Investment Bank**
 Ivan Frishberg, Chief Sustainability Officer, **Amalgamated Bank**



<p>Mike Ilardi, Director of Business Development, The Climate Service</p>		
<p>4:15 Networking break</p>		
<p>4:30 – Adaptation finance: challenges and opportunities</p> <ul style="list-style-type: none"> • <i>Has the focus on mitigation and climate risk led to investors overlooking the need for adaptation finance?</i> • <i>What opportunities does adaptation finance present for investors?</i> • <i>What are the challenges for the private sector of financing adaptation?</i> • <i>How can we encourage adaptation without it seeming defeatist?</i> <p>Moderator: Stacy Swann, CEO & Founding Partner, CFA, Climate Finance Advisors</p> <p>Bella Tonkonogy, Director, Climate Policy Initiative</p>	<p>4:30 – The future of ESG data</p> <ul style="list-style-type: none"> • <i>What role should policymakers and service providers each play in increasing the quality, availability and comparability of ESG data?</i> • <i>Working with third-party data companies: what are the best practices for asset managers?</i> • <i>What are the key challenges in obtaining and analyzing supply chain data?</i> • <i>Which new data sources and technology are potentially most useful for investors?</i> <p>Moderator: Karen Kerschke, US ESG Policy Analyst, Principles for Responsible Investment (UN PRI)</p> <p>Franca Wolf, Senior Analyst, Corporate Risk Analytics, Verisk Maplecroft</p> <p>Lydia Harvey, Executive Director, ESG Specialist, J. P. Morgan</p>	<p>4:30 – Voluntary carbon markets and the energy transition</p> <ul style="list-style-type: none"> • <i>What role should carbon offsets play in corporate transition plans?</i> • <i>Will voluntary carbon markets be able to meet corporate demand for offsets?</i> • <i>Does it make sense to try to commoditise carbon credits?</i> • <i>Are investors undertaking sufficient engagement with corporates on the use of carbon offsets?</i> <p>Moderator: Campbell Moore, Carbon Markets Strategy Lead, Global Carbon Markets Team, The Nature Conservancy</p> <p>Sonja Gibbs, Board Member, ICVCM & Managing Director and Head of Sustainable Finance, Institute of International Finance</p>



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<p>Carter Brandon, Senior Fellow, World Resources Institute (WRI) Jay Koh, Co-founder & Managing Director, The Lightsmith Group</p>	<p>Jesse Duncan, Program Officer, The Tipping Point Fund</p>	
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5:15 *Networking drinks reception*

6:30 *End of conference*

Day Two – Wednesday 7th December

8:15 **Registration & coffee**

Stream A <i>Social & political issues</i>	Stream B <i>Stewardship & engagement</i>	Stream C <i>Investment frontiers</i>
<p>9:00 – Intersections between the corporate and political spheres</p> <ul style="list-style-type: none"> <i>How are companies to respond to a political agenda which is incongruent with their own values on DEI and climate change?</i> <i>Tracking corporate political spending and lobbying: how can we acquire more data on corporate political influence?</i> 	<p>9:00 – Deep dive workshop: Innovations in investment stewardship practices</p> <ul style="list-style-type: none"> <i>How do you structure engagement?</i> <i>What are the key escalation points and when do you utilise them?</i> <i>How do you monitor and hold investment managers to account</i> 	<p>9:00 – How should investors allocate more to emerging markets?</p> <ul style="list-style-type: none"> <i>What role can investors most usefully play in promoting energy transition and the achievement of the SDGs in EM?</i> <i>Does increasing ESG integration risk</i>



<ul style="list-style-type: none"> • <i>With only half of US states mandating company lobbying disclosure, how can we encourage voluntary disclosure?</i> • <i>Court rulings: what are the associated risks with companies getting involved in matters such as reproductive healthcare rights?</i> <p>Moderator: Jérôme Tagger, CEO, Preventable Surprises Heidi Welsh, Founding Executive Director, Sustainable Investments Institute (Si2) Sarah Bryner, Director of Research and Strategy, OpenSecrets Shelley Alpern, Director of Shareholder Advocacy, Rhia Ventures Bennett Freeman, Associate Fellow, Chatham House and Former SVP, Sustainability Research and Policy, Calvert Investments</p>	<p><i>for their engagement activities?</i></p> <ul style="list-style-type: none"> • <i>When is the right time to vote against directors?</i> <p>Workshop chair: Sofía De La Parra, Senior ESG Analyst, FAIRR Initiative David Bennell, Strategic Advisor, Transformational Investing in Food Systems (TIFS) Ruth Shaber, President & Founder, Tara Health Foundation Carly Jacobs, Senior Specialist, Stewardship, Active Ownership 2.0, UNPRI</p>	<p><i>detering capital flows to EM?</i></p> <ul style="list-style-type: none"> • <i>Can blended finance help alleviate political and currency risk in EM investments?</i> • <i>What else can policymakers do to ensure investment goes to the regions and sectors that need it most?</i> <p>Moderator: Lucy Fitzgeorge-Parker, Editor, Responsible Investor Patrick O'Connell, EMIA's Chair of Private Sector Programs, Emerging Markets Investors Alliance Andrew Howell, Director of Investor Influence, Environmental Defense Fund (EDF)</p>
<p>9:45 Networking break</p>		
<p>10:00 – How can responsible investors take on Big Tech?</p> <ul style="list-style-type: none"> • <i>Is Big Tech’s prominence in ESG indices appropriate given the sector’s social</i> 	<p>10:00 – A look ahead to the 2023 proxy season</p> <ul style="list-style-type: none"> • <i>With the number of shareholder proposals expanding massively,</i> 	<p>10:00 – Trends in ESG litigation</p> <ul style="list-style-type: none"> • <i>How are investors using litigation as an active ownership tool?</i>



impact and lack of accountability?

- *How valuable was Meta’s human rights audit and has it sent a precedent for the sector?*
- *What tools can investors use to influence companies with dual class share structures?*
- *Are investors doing enough to address Big Tech’s global impact?*

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

Sam Jones, President and Co-founder, **Heartland Initiative**
Isedua Oribhabor, Business and Human Rights Lead, **Access Now**

Lisa Cox, Director, **Christian Brothers Investment Services (CBIS)**

Jan Rydzak, Company and Investor Engagement Manager, **Ranking Digital Rights**

what’s going to happen moving forward?

- *Can we expect to see a trend towards director voting in the US as we have in Europe?*
- *Is it appropriate for a shareholder proposal to ask for action or should disclosure be the focus?*
- *Will the new climate disclosure rules reduce the number of shareholder proposals asking for climate disclosure and transition plans?*

Moderator: Paul Verney, Senior Reporter, **Responsible Investor**
Ryan McQueeney, Analyst, Sustainable Investment Stewardship, **Wespath Benefits and Investments**

Diana Kearney, Senior Legal and Shareholder Advocacy Advisor, **Oxfam**

Caroline Laberge, Director Sustainable Investing, **CDPQ**

- *Is ESG issues-based litigation undermining the growth of sustainable finance or making it more robust?*
- *Which areas of litigation pose the biggest risks for investors in 2023? What role is human rights litigation starting to play?*
- *How much are insurers willing to cover the litigation costs of companies sued over climate-related damages?*

Moderator: Carlos Portugal Gouvêa, Associate Professor, **University of São Paulo Law School** and Visiting Professor, **Harvard Law School**

Hana Heineken, Senior Attorney, Climate Financial Strategies, **Center for International Environmental Law (CIEL)**
Andrew Neidhardt, Assistant Counsel, **Office of the New York State Comptroller**

10:45 Networking break



11:15 – Applying the Just Transition to an investment strategy

- *What does Just Transition mean in a US context?*
- *What can investors do to address the social issues raised by corporate transition plans?*
- *What role can and should the financial sector play in ensuring a Just Transition?*
- *Will there be opportunities associated with the Just Transition, or only costs?*

Moderator: Amit Bando, Chief Economist and Senior Advisor for Just and Inclusive Economics, **Ceres**
Anita Dorett, Director, **Investor Alliance for Human Rights**
Bob Dannhauser, Senior Advisor, **Shift Project**

11:15 – Engaging with big emitters: what can we learn from the Exxon campaign?

- *Is Engine No 1’s successful campaign the benchmark for meaningful engagement with the energy sector?*
- *Is focusing on directors the most effective way to challenge companies on climate change?*
- *What are the limits of corporate engagement? How do you know if an ask is reasonable?*
- *Have the board changes at Exxon achieved meaningful change?*

Moderator: Bennett Freeman, Associate Fellow, **Chatham House** and Former SVP, Sustainability Research and Policy, **Calvert Investments**
Julie B. Tanner, Director, Socially Responsible Investing, **Christian Brothers Investment Services (CBIS)**
Aeisha Mastagni, Portfolio Manager, Sustainable Investment & Stewardship Strategies, **CalSTRS**

11:15 The growth and democratization of impact investing

- *Is it possible to achieve meaningful impact in public markets?*
- *Is the focus on measuring impact long overdue or a time-consuming distraction?*
- *Which impact measurement methodologies are most useful for investors?*
- *Does the US need a labelling system similar to the SFDR to prevent impact greenwashing?*

Moderator: Fran Seegull, President, **U.S. Impact Investing Alliance**
Cristian Norambuena, Director, Private Equity, **Tikehau Capital**
Bhavika Vyas, Managing Director, **StepStone**
Keri Larkin, Founding Member, **Greater Share**

	Bruce Simpson, Senior Advisor ESG to multiple companies	Michaela Edwards, Partner, Capricorn Investment Group and the Sustainable Investment Fund
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12:00 Lunch

1:00 Investor panel: balancing tomorrow's world with today's duty and returns

- *The Department of Labor said last year that there is 'no reason' fiduciaries shouldn't consider climate or ESG factors when investing. Has this shift affected investor perspectives on fiduciary duty?*
- *Are US asset owners pushing managers on sustainability?*
- *What evidence do asset owners look for on managers' credibility on ESG? How is it affecting manager selection?*
- *Are investors willing to sacrifice initial returns for long-term sustainability performance?*

Moderator: Dean Hand, Chief Research Officer, **The Global Impact Investing Network (GIIN)**

Anna Totdahl, Investment Officer, ESG & Sustainability, **Oregon State Treasury**

Annie Chor Joyce, Managing Director, Head of ESG, **Amundi US**

Fran Seegull, President, **U.S. Impact Investing Alliance**

Rick Alexander, CEO, **The Shareholder Commons**

1:50 Biodiversity and nature: risks, opportunities, and best practices

- *Are investors taking transition risk sufficiently seriously in the context of biodiversity?*
- *Where are the investible opportunities for public markets investors in nature protection and restoration?*
- *Can aggregation help to address scale issues in natural capital investment?*
- *Expectations for COP15: will it do for biodiversity what Paris did for climate?*

Moderator: Jérôme Tagger, CEO, **Preventable Surprises**

Richard Hewston, Director – Climate, Nature & Resilience Practice, **Verisk Maplecroft**

Julie Abrams, Senior Director, Investment Origination, NatureVest, **The Nature Conservancy**

Liesel Van Ast, Manager, **United Nations Environment Programme Finance Initiative (UNEP FI)**



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2:40 COP27: where do we go from here?

- *What were the key takeaways from COP27 for the private sector?*
- *Is there a role for investors in addressing loss and damage?*
- *What will be the main themes in climate investment over the coming year?*
- *How important will COP28 in Dubai be for financial institutions?*

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**
Martina Macpherson, Head of ESG Product Management, **SIX**

3:20 *Chair's closing remarks*

3:30 *End of conference*