

# RI USA 2023 agenda

*Thriving in the rapidly evolving US sustainable finance landscape*

Convene at One Liberty Plaza, New York | 15-16 November 2023

## Day one – Wednesday 15<sup>th</sup> November

**8:00 Registration**

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

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

**8:55 Opening remarks**

Daniel Crowley, Partner, **K&L Gates LLP**

**9:10 Plenary 1: Net zero: Interim targets and external challenges**

- What challenges will financial institutions face in meeting the first round of net zero targets?
- Could net zero targets encourage divestment from higher-emitting sectors and jurisdictions?
- Is meeting short-term net zero targets compatible with financing the energy transition?
- How is the role of GFANZ in driving net zero evolving?

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

**Speakers:**

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

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

For registration queries:  
**Customer Services**  
[customerservices@pei.group](mailto:customerservices@pei.group)

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Simon Glynn, Founder, **Zero Ideas**

Ned Shell, Counselor to the Under Secretary for Domestic Finance, **U.S. Department of Treasury**

Divya Mankikar, Sustainability Market Engagement, **S&P Global Sustainable1**

## **10:00 Plenary 2: Setting the baseline: Disclosure standards and US corporates**

- Will the ISSB standards meet investor expectations and requirements?
- What level of uptake of ISSB is expected in the US?
- How are corporates preparing for SEC and/or ISSB reporting?
- How can regulators and standard setters alleviate the reporting burdens on companies?

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

### **Speakers:**

Neil Stewart, Director of Corporate Outreach, **IFRS**

Robert Eccles, Professor, Saïd Business School, **University of Oxford**

Betty Huber, Partner, **Latham & Watkins**

Meagen Stack, Manager ESG Reporting, **Chevron**

*10:50 Networking break*

## **11:20 Keynote: ESG and the energy transition**

- The divestment divide: the challenge for responsible investors
- ESG regulation: the implications for US asset owners
- The anti-ESG movement: where next?

John Skjervem, CIO, **Utah Retirement Systems**

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

## **11:40 Plenary 3: Fiduciary duty in the 21<sup>st</sup> century**

- Has increased consideration of environmental, social and governance risks shifted understanding of fiduciary duty?
- Could investors have a legal case to answer in relation to fiduciary duty and ESG?
- The case against anti-ESG: studies on losses by limiting investment universes

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- Can any values-based, ethical or responsible investing be compatible with fiduciary duty?

**Moderator:** Steven Rothstein, Managing Director, Accelerator, **Ceres**

**Speakers:**

Sara Murphy, Chief strategy officer, **The Shareholder Commons**

Tim Doyle, Senior Advisor, **Bipartisan Policy Center**

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

Aeisha Mastagni, Portfolio manager, **CalSTRS**

### 12:30 Plenary 4: Engaging with nature: best practice for investors

- TNFD: what does it mean for corporates and investors?
- Tools and methodologies for assessing biodiversity risk to portfolios
- The importance of considering the nature-climate nexus
- Nature Action 100: can collective engagement move the needle on biodiversity?

**Moderator:** Heather Wright, Vice President, Markets, **World Wildlife Fund**

**Speakers:**

Mirtha Kastrapeli, Sector Head for Consumer in Corporate Ratings, **ISS ESG**

Dinah Koehler, Director of ESG Research, **FactSet**

Naomi English, Managing Director, Head of Climate Strategy, **MSCI**

Tara Mei Smith, ESG Integration Officer, **NYC Office of the Comptroller**

13:20 Lunch

Stream A	Stream B	Stream C
<b>14:20 – A1: Physical climate risk and resilience</b> <ul style="list-style-type: none"> <li>• Do investors have the necessary data to understand and act on climate resilience?</li> </ul>	<b>14:20 – B1: Will antitrust kill collective engagement?</b> <ul style="list-style-type: none"> <li>• Is big better or are smaller targeted engagements more effective?</li> </ul>	<b>14:20 – C1: Biodiversity data and metrics</b> <ul style="list-style-type: none"> <li>• Are companies and investors ready for TNFD reporting?</li> </ul>

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<ul style="list-style-type: none"> <li>• What are the barriers to channelling private sector finance into climate resilience?</li> <li>• How can policy promote private finance flows into the sector?</li> <li>• Where is climate resilience financing most urgently needed in the US?</li> </ul> <p><b>Moderator:</b> Carolyn Allwin, Adjunct Professor, <b>Columbia University</b></p> <p><b>Speakers:</b> Cary Krosinsky, Co-Founder, <b>Sustainable Finance Institute</b></p> <p>Andrew Teras, Client Strategy Lead, Sustainable Finance, <b>ICE</b></p> <p>Anya Solovieva, Director, Global Commercial Lead, Climate Solutions, <b>Morningstar</b></p>	<ul style="list-style-type: none"> <li>• Are investors being put off signing up by increased scrutiny from lawmakers?</li> <li>• Do antitrust and competition investigations pose a credible threat?</li> <li>• How can and should the largest collaborative initiatives move forward in this environment?</li> </ul> <p><b>Moderator:</b> Jérôme Tagger, Chief Executive Officer, <b>Preventable Surprises</b></p> <p><b>Speakers:</b> Sarah Bernstein, Head of Sustainability, <b>Meketa Investment Group</b></p> <p>Denise Hearn, Senior Fellow, <b>Columbia Center on Sustainable Investment</b></p> <p>John Hoepfner, Head of US Stewardship and Sustainable Investments, <b>LGIM America</b></p> <p>Lisa Pinheiro, Managing Principal, <b>Analysis Group</b></p>	<ul style="list-style-type: none"> <li>• How are data providers gearing up to support them?</li> <li>• Where are the biggest gaps in biodiversity data?</li> <li>• How is technology helping to meet the biodiversity data challenge?</li> </ul> <p><b>Moderator:</b> Lucy Fitzgeorge-Parker, Editor, <b>Responsible Investor</b></p> <p><b>Speakers:</b> Lauren Lynch, Manager for Blue Finance, <b>WWF</b></p> <p>Vicki Benjamin, Co-Founder and CEO, <b>Karner Blue Capital</b></p>
15:05 Networking break		

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<p><b>15:25 – A2: Methane: Data, risk and engagement</b></p> <ul style="list-style-type: none"> <li>• Are investors doing enough to understand portfolio methane emissions?</li> <li>• What tools and methodologies can investors access to understand methane emissions?</li> <li>• How should investors be engaging with corporates on methane?</li> <li>• The policy and regulatory outlook on methane emissions</li> </ul> <p><b>Moderator:</b> Andrew Howell, Director of Investor Influence, <b>Environmental Defense Fund (EDF)</b></p> <p><b>Speakers:</b> Sofía De La Parra, Senior ESG Analyst, <b>FAIRR Initiative</b></p> <p>Lucas Schoeppner, Manager, Sustainable Investment Strategies, <b>Wespath</b></p>	<p><b>15:25 – B2: Proxy voting: Evolution and advice</b></p> <ul style="list-style-type: none"> <li>• Have E&amp;S shareholder proposals become more prescriptive?</li> <li>• How has the anti-ESG backlash impacted proxy voting and proxy advice?</li> <li>• Asset owners are increasingly setting their own voting policies. How does that affect manager engagement with companies?</li> <li>• In the wake of the Exxon and Engine No 1 case, is ESG becoming a board vote issue?</li> </ul> <p><b>Moderator:</b> Georgia Stewart, CEO, <b>Tumelo</b></p> <p><b>Speakers:</b> Heidi Welsh, Executive Director, <b>Sustainable Investments Institute (Si2)</b></p> <p>Jessica Wirth Strine, Managing Partner &amp; CEO, <b>Sustainable Governance Partners</b></p> <p>Jerry Theodorou, Director, <b>R Street</b></p>	<p><b>15:25 – C2: ESG bonds: Building ambition</b></p> <ul style="list-style-type: none"> <li>• How has the labelled bond market been impacted by the anti-ESG movement?</li> <li>• What sectors, labels and issuers provide the best prospects for growth in 2024?</li> <li>• Where do US muni bonds fit into the ESG-labelled market?</li> <li>• SLBs vs transition bonds: which is more effective in driving decarbonisation?</li> </ul> <p><b>Moderator:</b> Lucy Fitzgeorge-Parker, Editor, <b>Responsible Investor</b></p> <p><b>Speakers:</b> Lisa Bozzelli, Sustainable Finance Advisor</p> <p>Anand Rajagopal, Private Markets Sustainability Lead, <b>Phoenix Group</b></p> <p>Colleen Keenan, Senior Financial Officer, <b>World Bank</b></p>
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16:10 Networking break

**16:30 – A3: Climate lobbying:  
Behind closed doors**

- Assessing corporates' governance of climate policy advocacy: what is best practice?
- Have investors been tough enough on climate lobbying?
- How and when should investors escalate on climate lobbying?
- What is misaligned with Paris when it comes to lobbying?

**Moderator:** Paul Verney,  
Features Writer,  
**Responsible Investor**

**Speakers:**  
Tracey Rembert,  
Shareholder Engagement  
Specialist, **ICCR**

Kendra Haven, Director,  
**Influence map**

Amy Orr, Director of US  
Shareholder Engagement,  
**Boston Common Asset  
Management**

**16:30 – B3: Gender and  
investment: bridging the gap**

- Are investors doing enough on gender?
- What metrics are most relevant for investors?
- How can investors effectively engage corporates on gender?
- How does gender fit into the broader DE&I landscape?

**Moderator:** Joellen  
Meckley, Executive  
Director, **Center for  
Special Needs & Center  
for Women in Financial  
Services, American  
College of Financial  
Services**

**Speakers:**  
Diana van Maasdijk, Co-  
Founder & CEO, **Equileap**

Carol Jeppesen, Head of  
US, **PRI**

Andreas Hoepner,  
Professor of Operational  
Risk, Banking & Finance,  
**University College Dublin**

**16:30 – C3: ESG data: The AI  
challenge**

- What are the use cases for AI in sustainable investing?
- Could AI help identify greenwashing?
- What are the risks associated with AI use in ESG?
- What guidelines or standards do investors need and who should be responsible for them?

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

**Speakers:**  
Patricia Pina, Head of  
Product Research &  
Innovation, **Clarity AI**

Ulrich Atz, Research Fellow,  
**New York University**

Mitali Prasad, Portfolio  
Manager & Research  
Analyst, **Trillium Asset  
Management**

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## 17:15 Networking drinks reception

## 17:25 Gender Equity Investing Awards

The Gender Equity Investing Awards have shortlisted 10 mutual funds based on their official SEC-reported holdings for their intentional gender focus and their measurable performance of investing in firms with relatively high gender equity among top executives, measured as the shares held by female execs in relation to the shares held by all execs.

An esteemed jury will reflect on the impact additionality of the short-listed funds to determine the winners. The jury is co-chaired by award organizers Marlene Timberlake D'Adamo & Andreas Hoepner and includes inter alia former PRI CEO Fiona Reynolds, former UN Women Deputy Executive Director Anita Bhatia, US SIF CEO Maria Lettini, Women of the World Endowment CEO Patience Marime-Ball, Solactive Founder & CEO Steffen Scheuble and many more.

Patricia Pina, Head of Product Research & Innovation, **Clarity AI**

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

Andreas Hoepner, Professor of Operational Risk, Banking & Finance, **University College Dublin**

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

## 18:45 End of Day One

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## Day Two – Thursday 16<sup>th</sup> November

**8:00 Registration and refreshments**

Stream A	Stream B	Stream C
<p><b>9:00 – A4: Racial equity and engagement</b></p> <ul style="list-style-type: none"> <li>• How is best practice in engaging on racial justice evolving?</li> <li>• What role do racial justice audits play in the stewardship toolkit?</li> <li>• What lessons have been learned from the first generation of racial justice audits?</li> <li>• Has the anti-ESG movement affected investor appetite for engagement on racial issues?</li> </ul> <p><b>Moderator:</b> Paul Verney, Features Writer, <b>Responsible Investor</b></p> <p><b>Speakers:</b> Courtney Wicks, Executive Director, <b>IASJ</b></p> <p>Renaye Manley, Deputy Director, <b>SEIU</b></p> <p>Lydia Kuykendal, Director of Shareholder Advocacy,</p>	<p><b>9:00 – B4: Deep dive workshop: SEC climate disclosure rules</b></p> <ul style="list-style-type: none"> <li>• What challenges do the SEC's climate disclosure rules present for corporates?</li> <li>• How do the SEC's rules fit with other standards, ISSB and ESRS?</li> <li>• Have the SEC's rules been blunted by the threat of legal action and ESG backlash?</li> <li>• Are the climate rules a precursor to standards on other environmental and/or social issues?</li> <li>• Will the SEC's proposed ESG fund naming rule prevent greenwashing?</li> </ul> <p><b>Moderator:</b> Azish Filabi, Executive Director, Maguire Center for Ethics, <b>The American College of Financial Services</b></p> <p><b>Speakers:</b> Dan Byrd, ESG &amp; Climate</p>	<p><b>9:00 – C4: US banks and the energy transition</b></p> <ul style="list-style-type: none"> <li>• Where are the opportunities for banks in financing the US energy transition?</li> <li>• Has the anti-ESG movement impacted banks' ability to provide green finance?</li> <li>• What are the implications of net zero for investment banking?</li> <li>• How should investors engage banks on transition financing?</li> </ul> <p><b>Moderator:</b> Lucy Fitzgeorge-Parker, Editor, <b>Responsible Investor</b></p> <p><b>Speakers:</b> Steven Rothstein, Managing Director, <b>Ceres Accelerator for Sustainable Capital Markets</b></p> <p>Sabina Chatterjee, Director, Sustainable Finance &amp; Advisory, <b>Wells Fargo</b></p>

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<b>Mercy Investment Services</b>	<p>Industry Practice Lead, <b>Moody's</b></p> <p>Rachel Curley, Director of Policy and Programs, <b>US SIF</b> Danielle Reyes, Partner, <b>Goodwin Procter LLP</b></p> <p>Danielle Reyes, Partner, <b>Goodwin</b></p>	<b>Corporate &amp; Investment Banking</b> <p>Rachel Mattes Greenberg, Head of Sustainability, <b>Citizens</b></p>
9:45 Networking break		
<p><b>10:00 – A5: Workers rights in the US and abroad</b></p> <ul style="list-style-type: none"> <li>• What does the return of unionisation in the US mean for investors?</li> <li>• How are investors addressing workers' rights from an ESG perspective a) in the US, b) globally?</li> <li>• How can investors manage reputational and regulatory risks from labour issues in global supply chains?</li> <li>• Is workers' rights an issue that can cross the ESG political divide?</li> </ul> <p><b>Moderator:</b> Alison Taylor, Clinical Professor, <b>NYU Stern School of Business</b></p> <p><b>Speakers:</b> Chavi Keeney Nana, Professor from practice,</p>	<p><b>10:00 – B5: E&amp;S proposals: A blunt instrument?</b></p> <ul style="list-style-type: none"> <li>• What are the implications of the recent surge in numbers of E&amp;S proposals for investors and corporates?</li> <li>• Are E&amp;S proposals effective in driving change?</li> <li>• How do shareholder proposals fit into the investor engagement toolkit?</li> <li>• Will investors fight for the right to file proposals if Republicans seek to weaken shareholder rights?</li> </ul> <p><b>Moderator:</b> Paul Verney, Features Writer, <b>Responsible Investor</b></p>	<p><b>10:00 – C5: Auditing and assurance and the ESG disclosure push</b></p> <ul style="list-style-type: none"> <li>• How are auditors gearing up for the expected surge in ESG reporting?</li> <li>• What are the key challenges in assuring sustainability information?</li> <li>• The growing role of materiality assessments in ESG reporting</li> <li>• How valuable is limited assurance to investors?</li> </ul> <p><b>Moderator:</b> Shivaram Rajgopal, Kester and Byrnes Professor of Accounting and Auditing, <b>Columbia Business School</b></p> <p><b>Speakers:</b> Willie Botha, Technical Director, <b>IAASB</b></p>

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<p><b>University of Michigan Law School</b></p> <p>Matthew Illian, Director of Responsible Investing, <b>United Church Funds</b></p>	<p><b>Speakers:</b> Danielle Fugere, President &amp; Chief Counsel, <b>As You Sow</b></p> <p>Sanford Lewis, Attorney, <b>Sanford Lewis &amp; Associates</b></p> <p>Heidi Welsh, Executive Director, <b>Sustainable Investments Institute (Si2)</b></p>	<p>Samantha Ross, Founder, AssuranceMark, <b>The Investors' Consortium for Assurance</b></p> <p>Carmen Lu, Counsel, Wachtell, <b>Lipton, Rosen &amp; Katz</b></p>
10:45 Networking break		
<p><b>11:15 – A6: The evolving role of benchmarks in ESG investing</b></p> <ul style="list-style-type: none"> <li>• Why is 'standardisation and transparency' of ESG benchmarks important?</li> <li>• Should there be minimum ESG requirements for broad market benchmarks?</li> <li>• Should ESG funds use broad market benchmarks for construction and reporting?</li> </ul> <p><b>Moderator:</b> Svenja Dube, Associate Professor, Baruch College, <b>City University of New York</b></p> <p><b>Speakers:</b> Carolyn Eagle, Head of Americas, Sustainable</p>	<p><b>11:15 – B6: Corporate transition plans: credibility, consistency, scrutiny</b></p> <ul style="list-style-type: none"> <li>• What constitutes a credible transition plan in 2023?</li> <li>• Are investors providing consistent messaging to companies with their voting?</li> <li>• Say on Climate: does opposition mean the mechanism is working?</li> <li>• Rebaselining: will it become a standard ask from investors?</li> </ul> <p><b>Moderator:</b> Carolyn Allwin, Adjunct Professor, <b>Columbia University</b></p> <p><b>Speakers:</b> Patricia Hudson, Executive Director, <b>GFANZ</b></p>	<p><b>11:15 – C6: ESG litigation: the next battlefield</b></p> <ul style="list-style-type: none"> <li>• Understanding the risks of ESG litigation for investors and corporates</li> <li>• How can and should investors leverage litigation to achieve sustainability goals?</li> <li>• Lessons from key recent and upcoming cases</li> <li>• Litigation and the anti-ESG movement</li> </ul> <p><b>Moderator:</b> Lucy Fitzgeorge-Parker, Editor, <b>Responsible Investor</b></p> <p><b>Speakers:</b> Cynthia Hanawalt, Director, Climate Finance and Regulation, <b>Columbia Climate School</b></p>

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Equity Index Product, <b>FTSE Russell</b>  Bill Mills, CEO, <b>KPX LLC</b>	Radhika Mehrotra, Associate Director of Capital Markets, <b>CDP</b>  Andreas Ross, Head of New Product Research and Development, <b>ZAIS</b>	Carmen Lu, Counsel, <b>Wachtell, Lipton, Rosen &amp; Katz</b>
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12:00 *Lunch*

### 13:00 Fireside chat

Maria Lettini, CEO, **US SIF**

**Moderator:** Paul Verney, Features Writer, **Responsible Investor**

### 13:20 Keynote 2

Ethan Zindler, Climate Counsellor to the Secretary, **U.S. Department of Treasury**

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

### 13:40 Plenary 5: The long arm of the EU: How will European regulation affect US investors?

- Taking stock of EU regulation: has SFDR improved sustainability disclosures for US asset managers with funds covered by the rules?
- What challenges will investors and corporates face in navigating the EU approach alongside incoming SEC rules?
- Are US companies prepared for the EU's corporate sustainability reporting directive (CSRD)?
- Are proposed EU due diligence disclosure rules (CSDDD) fit for purpose? Will they provide the data US investors need?

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

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**Speakers:**

Annette Capretta, Chief Counsel, **ICI Global**

Andreas Hoepner, Professor of Operational Risk, Banking & Finance, **University College Dublin**

Antoine Begasse, Finance Counsellor, **Delegation of the European Union to the United States**

14:25 *Networking break*

**14:20 Plenary 6: Shifting the green centre of gravity: the IRA, the US and Europe**

- Has the US taken the top spot globally for climate investments by focusing on real economy policies over disclosures?
- The IRA and investor allocation strategies: the outlook for public and private markets
- How effective have previous US policy initiatives been in boosting climate investment?
- Can the IRA help to bridge the political divide on sustainability?

**Moderator:** Sonja Gibbs, Head of Sustainable Finance, **Institute of International Finance**

**Speakers:**

Mike Ferguson, Senior Director and Analytical Manager, Sustainable Finance Americas, **S&P Global Ratings**

Whitney Mann, Manager, Center for Climate-Aligned Finance, **RMI**

**15:25 Plenary 7: Navigating the ESG backlash: the challenges for investors**

- How are asset owners responding to the anti-ESG movement?
- Who is paying the price for blacklisting: financial firms or public sector funds?
- Will asset managers be able to avoid taking sides on ESG?
- ESG communications: from greenwashing to green hushing

**Moderator:** Robert Eccles, Professor, Saïd Business School, **University of Oxford**

**Speakers:**

Colleen Davis, Delaware State Treasurer, Office of the State Treasurer, **Government of Delaware**

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Eli Lehrer, President, **R Street**

Ryan McQueeney, Manager, Investments Marketing and Communications, **Wespath**

Tim Smith, Senior Policy Advisor, **ICCR**

## **16:25 Closing remarks**

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

## **16:35 End of conference**

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

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

For registration queries:  
**Customer Services**  
[customerservices@pei.group](mailto:customerservices@pei.group)

[responsible-investor.com/ri-usa/](https://responsible-investor.com/ri-usa/)

The logo for the Partnership for Environmental Investment (PEI) is located in the bottom right corner. It consists of the letters 'PEI' in a bold, white, sans-serif font, set against a red background that forms a diagonal triangle.