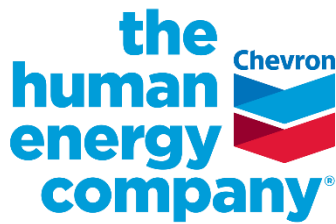


Thriving in the rapidly evolving US sustainable finance landscape

Lead sponsors



Sponsors



Associate sponsors



Please note, this is a draft document, session timings and descriptions are subject to occasional change.

For program information:
Finlay Eglinton
finlay.eglinton@pei.group

For sponsorship opportunities:
William Powell
william.p@pei.group

For registration queries:
Customer Services
customerservices@pei.group

Day one

Tuesday 3 December

08:55 Opening remarks

Gina Gambetta, Senior Reporter, **Responsible Investor**

09:00 Plenary 1: Transition finance in the US: Driving change through investment

- How are US investors approaching high-emitting sectors and corporates?
- Will transition finance be the main source of alpha in the US energy transition?
- Do US investors want dedicated transition finance regulation and/or instruments?
- Is there a tension between financing the transition and meeting net zero targets?

Moderator: **Andrew Howell**, Senior Director, Sustainable Finance, **Environmental Defense Fund (EDF)**

Curtis D. Ravenel, Senior Advisor to the Co-Chair & Vice Chair, **GFANZ**

Candice Coppere, Head of Climate and Nature Solutions, Product, **ISS STOXX**

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

Andrew Siwo, Head of Sustainable Investments and Climate Solutions, **New York State Common Retirement Fund**

09:50 Plenary 2: Manager selection in the US

- How has the politicisation of ESG impacted manager selection?
- Is stewardship being priced into manager selection or neglected in search of lower fees?
- Is manager selection being utilised enough to drive asset owner priorities through managers?
- Are consultants doing enough to drive asset owner priorities through manager selection?
- Given the US context, will climate-focused/net zero investors drift to European-headquartered managers?

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**

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

Rajith Sebastian, Head of ESG and Sustainable Investing, **New York State Insurance Fund (NYSIF)**

Sarika Goel, Global Head Sustainable Investment Research, **Mercer**

10:40 Networking break

11:10 Keynote - Eye of the storm: former SEC policy director reflects on three years at US regulator

Heather Slavkin Corzo, Principal, **Mindset**
Moderator: Gina Gambetta, Senior Reporter, **Responsible Investor**

11:30 Plenary 3: ESG regulation: The US, EU and beyond

- How are US investors navigating the SFDR and what do they want out of the regulatory reform?
- US anti-greenwashing efforts: what’s next for SEC climate-related disclosures and name rules?
- Expectations on financial institutions from CSRD and SEC climate rule
- Compliance vs action – how are investors balancing mandatory and voluntary disclosure needs with investment/stewardship activities?

Moderator: **Steven Rothstein**, Managing Director, Accelerator, **Ceres**
Sandra Silea, Director, ESG & Stewardship, **AustralianSuper**
Elizabeth Seeger, Board Member, ISSB, **IFRS Foundation**
Sireen Hajj, Director, Investor Outreach, **US SIF**

12:15 Plenary 4: Nature investment in North America: Risks and opportunities

- Nature as a systemic risk: how are investors approaching the challenge?
- Measuring biodiversity and nature risk across portfolios: methodologies, tools and barriers
- Public vs private markets: where are the nature investment opportunities?
- Are US corporates doing enough, and disclosing enough, on nature?

Moderator: **Gina Gambetta**, Senior Reporter, **Responsible Investor**
Lauren Compere, Managing Director, Head of Stewardship & Engagement, **Boston Common Asset Management**
Felipe Carazo, Head of Alliance Management, Tropical Forest Alliance, **World Economic Forum**
Daan Van Acker, Director, **InfluenceMap**

13:00 Lunch

Stream A	Stream B
<p>13:50 – A1: Corporate transition plans: Next steps</p> <ul style="list-style-type: none"> • What does a credible transition plan look like? • Are US companies embracing the concept of transition plans? 	<p>13:50 – B1: The future of collaborative engagement in the US</p> <ul style="list-style-type: none"> • What exactly are the rules around collaborative engagement in the US?

<ul style="list-style-type: none"> • What guidance do companies and investors need? Prescriptive vs high-level • To what extent should climate lobbying activities be disclosed in transition plans? <p>Moderator: Dominic Webb, Senior Reporter, Responsible Investor Andreas Ross, Head of New Product Research and Development, ZAIS Group Joel Paque, Head of Partnerships, US, Climate Arc Jacob Hupart, Co-Chair of ESG Practice, Mintz Radhika Mehrotra, Associate Director Capital Markets, CDP</p>	<ul style="list-style-type: none"> • All noise and no heat: do legal threats around antitrust carry any weight? If so, where are the lines which shouldn't be crossed? • How much has the politicization of ESG stunted collective engagement in the US? • How can investors defend themselves against accusations? What is best practice? <p>Moderator: Gina Gambetta, Senior Reporter, Responsible Investor Marcela Pinilla, Director of Sustainable Investing, Zevin Claudia Martinez, Director of Research, Access to Medicine Foundation</p>
<p>14:30 Short turnaround break</p>	
<p>14:35 – A2: ESG Data: The next frontier</p> <ul style="list-style-type: none"> • Do companies have the data they need for mandatory climate reporting? • Supporting scope 3 data requirements • How is technology helping to meet the nature data challenge? • What are the biggest gaps in supply chain data? <p>Samantha McCafferty, Associate Director - Sustainable Investing, Harvard Management Company Paul Vozzella, Director, Americas, Asset Impact Greer Howard-Tabah, Vice President, ESG, Oaktree Capital Management</p>	<p>14:35 – B2: Agriculture: Sustainability and food security</p> <ul style="list-style-type: none"> • How are US investors thinking about agriculture and sustainability? • Is supporting food security compatible with financial institutions' net zero commitments? • How is technology changing the agricultural sustainability landscape? • Is regenerative agriculture a scalable solution? <p>Moderator: Chris Janiec, Americas Editor, Agri Investor Sofia De La Parra, Investor Outreach Manager, FAIRR Lara Fornabaio, Senior Legal Researcher, Columbia Center on Sustainable Investment</p>
<p>15:15 Short turnaround break</p>	

<p>15:20 – A3: Water risk: An investors’ guide</p> <ul style="list-style-type: none"> • Where are US companies most exposed to water risk? • How should investors engage corporates on water? • What tools and data are available to investors to assess water risk? • How can the private sector help to address water shortages? <p>Karen Sack, Executive Director, Ocean Risk and Resilience Action Alliance</p> <p>Saumya Mehrotra, Product Management Team, ISS STOXX</p>	<p>15:20 – B3: Bond markets vs private credit: Financing the energy transition</p> <ul style="list-style-type: none"> • Are bond markets fit-for-purpose for financing the energy transition? • SLBs and transition bonds: do they have a role in the US? • Where can private credit fill the gaps in debt financing for the transition? • How is the policy landscape impacting sustainability linked bond issuance in the US? <p>Moderator: Dominic Webb, Senior Reporter, Responsible Investor</p> <p>Jamison Friedland, Senior Sustainability Analyst, AXA IM</p> <p>Jamie Franco, MD and Global Head of Sustainable Investment, TCW Group</p>
---	---

16:00 Networking break

16:10 Workshops

This session allows participants to learn from both experts and each other, providing interactive small group discussions guided by designated facilitators.

<p>Workshop A - Attracting investor capital to U.S. housing</p> <ul style="list-style-type: none"> • What role do securitized products play in supporting U.S. housing? • How can issuers use the capital markets to allocate capital towards affordable housing? • What disclosure considerations are at play? 	<p>Workshop B - Climate adaptation</p>	<p>Workshop C - Investing in 2050</p> <p><i>Investing has changed. Is changing. Will change. And the pace of change is accelerating exponentially.</i></p> <ul style="list-style-type: none"> • How are fundamental assumptions around investing, including methodology, metrics, technology, regulation, and community formation, changing?
---	---	--

<ul style="list-style-type: none">• How do investors use these products to meet their clients' demands? <p>Nick Sapirie, Vice President, Single-Family Capital Markets, Fannie Mae</p> <p>Jamie Franco, MD and Global Head of Sustainable Investment, TCW Group</p>		<ul style="list-style-type: none">• How is the pace of change in investing accelerating?• How can we discuss the future of investing through thought-experiments and examine the issues shaping the next 25 years?• What are the implications of technology, new investing theories, demographic shifts, space exploration, and increased longevity for investing? <p>Co-facilitator: Doug Scott, CEO & Co-founder, Ethic</p> <p>Co-facilitator: Georgia Stewart, CEO, Tumelo</p>
---	--	---

17:00 Networking drinks

18:00 End of day one

Day two

Wednesday 4 December

8:00 Networking breakfast

Stream A	Stream B
<p>9:00 – A4: Understanding supply chain sustainability risk: An investors’ guide</p> <ul style="list-style-type: none"> • How are investors engaging with corporates on supply chain risk? • Where are the biggest gaps in corporate supply chain data? • How is regulation affecting corporate supply chain reporting? • Which supply chain issues are most material for investors? <p>Moderator: Gina Gambetta, Senior Reporter, Responsible Investor</p> <p>Patrick O’Connell, Director of Responsible Investing Research, AllianceBernstein</p>	<p>9:00 – B4: Greenwashing vs greenhushing</p> <ul style="list-style-type: none"> • How are US corporates and investors navigating political and public scrutiny of sustainability? • What are the implications of corporate greenhushing for investors? • How have investors responded to the SEC’s greenwashing crackdown? <p>Moderator: Dominic Webb, Senior Reporter, Responsible Investor</p> <p>Ekaterina Grigoryeva, Environment and Social Development Specialist (Global Lead, Financial Sector), The World Bank</p> <p>Ashley McNamee, Managing Director, ESG, Revelstoke Capital Partners</p> <p>Andrew Lee, Managing Director, Managing Director – Global Head of Sustainable and Impact Investing, UBS Global Wealth Management</p> <p>Lance Dial, Partner, K&L Gates</p>
<p>09:40 Short turnaround break</p>	
<p>09:45 – A5: Governance risk: Board competence and capabilities</p> <ul style="list-style-type: none"> • How are investors approaching governance risk? • How do governance failures impact investor confidence and company valuation? 	<p>09:45 – B5: Real estate and climate risk</p> <ul style="list-style-type: none"> • Decarbonising real estate – a missed low-hanging fruit opportunity for investors? • Real estate climate engagement • Uninsurable assets: what does this mean for real estate investors?

<ul style="list-style-type: none"> • What are the emerging standards for governance transparency and reporting? • How can companies improve their disclosure practices to build trust with investors? • AI board competence <p>Matt Moscardi, Head of Board Moneyball, Free Float Analytics (moderator)</p> <p>Marcel Bucsescu, Vice President, Strategic Engagement, NACD</p>	<ul style="list-style-type: none"> • How are US real estate developers approaching the net zero challenge? <p>Marina Severinovsky, Head of Sustainability North America, Schroders</p> <p>Brenden McEneaney, Senior Vice President, JLL</p> <p>Tom Idzal, Head of Americas, GRESB</p> <p>Daren Moss, Principal, ESG - Real Estate Lead, Ares Management</p>
---	--

10:25 Networking break

10:55 Plenary 5: Investing for sustainable outcomes

- Defining a 'sustainable outcome' or proving real-world sustainability impact in 2024: what methods and frameworks are investors using?
- Net-zero commitments and interim climate investing goals: are investors on track to meet them?
- The US renewable energy market is continuing to boom – the IRA has been referred to as the US green taxonomy: to what extent is this translating to opportunities for sustainability focussed investors in public markets?

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

Sarah Bernstein, Head of Sustainability, **Meketa Investment Group**

Wendy Cromwell, Head of Sustainable Investment, **Wellington Management**

Lila Preston, Head of Growth Equity, **Generation Investment Management**

11:35 Plenary 6: The state of corporate reporting in the US

- How are US corporates currently approaching sustainability reporting?
- Does corporate reporting in the US meet the needs of investors?
- Will ISSB become the de facto standard for corporate sustainability reporting in the US?
- What assurance are investors asking for on non-financial corporate disclosures?

Neil Stewart, Director of Corporate Outreach, **ISSB/IFRS Foundation**

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

Aeisha Magstani, Senior Portfolio Manager, Sustainable Investment & Stewardship Strategies, **CALSTRS**

Caitlin McSherry, Head of Investment Stewardship, **Neuberger Berman**

12:15 Lunch

13:05 Keynote

13:25 Plenary 7: After Exxon: The future of shareholder proposals

- What are the implications for shareholder rights in the US of the Exxon lawsuit?
- Will the file-first mentality of shareholders shift towards a more engagement/dialogue-focused approach?
- Will other companies follow Exxon's lead?
- How can shareholder proposals be used most effectively in a sustainability context?

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

Sanford Lewis, Director, **Shareholder Rights Group**

Danielle Fugere, President & Chief Counsel, **As You Sow**

Heidi Welsh, Executive Director, **Sustainable Investments Institute (Si2)**

14:10 Plenary 8: Fiduciary duty in 2024: Operating effectively within a polarized environment

- Beyond the politics: What does fiduciary duty look like for a universal owner in 2024?
- Which issues are necessary for a fiduciary to consider? Are some like AMR being overlooked?
- How can a universal owner mitigate systemic risks to portfolios?
- To what extent can sustainability preferences – and outcomes – be factored into fiduciary duty?

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**

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

15:00 End of conference