

# Responsible Investment Forum

New York 2023

## The Responsible Investment Forum: New York 2023

*North America's #1 event for ESG in private markets*

1-2 March, Convene 117 West 46<sup>th</sup> Street, New York

### Day one: 1 March

8:00

**Women's networking breakfast**

09:00

**PEI Welcome**

**Erin Wolfe**, Senior Conference Producer, **PEI**

09:05

**Chair's remarks**

**Peter Dunbar**, Head of Private Equity, **UNPRI**

09:10

**Opening keynote**

09:40

**Solidifying your ESG strategy**

- Between all the different initiatives out there today, it can be difficult to figure out how to continue to build out the best ESG strategy for your firm.
- Practical steps for ESG program streamlining and how to accurately measure each silo: E, S, and G.
- Understanding reporting requirements and certain regulatory concerns surrounding ESG inquiries.

**Lindsay Rosenstein**, Vice President, **Crestview**

**Allison Spector**, Head of ESG, **One Rock Capital Partners**

**Ritika Chandra**, Head of ESG and Senior Vice President, Strategic Resource Group, **TA Associates**

10:20

**27 years to net zero, are we on track?**

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- Current state of U.S. companies and their carbon programs and how close they are to matching the goals set out by the Paris Agreement
- Understanding geopolitical changes and how that is affecting companies' ability to get to net-zero.
- Practical tips to put a plan into action, NOW!

**Kate McCauley**, Vice President in the Environmental, Social and Governance Group, **Ares Management**

**11:00**

**Networking break**

**11:30**

**Making ESG data work for you**

- Practical steps for data intake, storage, examination, and identifying possible data gaps.
- Analyzing ESG data to drive progress on ESG value creation.
- Identifying ESG reporting quality and rooting out any biases in data

**Max Hong**, Chief Executive Officer, **Malk Partners**

**Heidi DuBois**, Global Head of ESG, **AEA Investors**

**Morgan Sheil**, AVP Impact & Sustainability, **Energy Impact Partners**

**12:10**

**The new ESG regulatory landscape**

- new SEC proposals around ESG requirements for investment advisers and firms and understanding enforcement policies
- keeping compliant with current SFDR mandates
- tactical solutions for ESG compliance within your firm and portfolio companies
- understanding consequences for ESG infractions & potentials surrounding loss of operating licenses

**Rob Esposito**, Senior ESG Counsel, **Apollo Global Management**

**12:50**

**Digital infrastructure and technology for ESG considerations**

- Using technology- driven solutions to create processes for sourcing, capture and processing, and validation to overcome data issues.
- Getting ESG portfolio engines to scale, is it better to build solutions internally or outsource to third parties?
- How to build up your digital infrastructure to protect company assets and data.

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13:00

Lunch

<p><b>14:30</b> <b>Stream A: Continued push towards Impact Investing</b></p> <ul style="list-style-type: none"> <li>- Status of the impact landscape and where PE firms are beginning to implement strategies.</li> <li>- Who should think about including impact funds and are there pros and cons to its implementation?</li> <li>- Expected trends in the impact space going into 2023 and beyond.</li> </ul>	<p><b>14:30</b> <b>Stream B: Case study: practical steps to expanding your net-zero program</b> <i>Chair: Nicolas Cottis, Partner, ESG Transaction Services, KPMG</i></p>	<p><b>14:30</b> <b>Stream C: Working session</b></p>	<p><b>14:30</b> <b>Stream D: ESG integration in private debt</b></p> <ul style="list-style-type: none"> <li>- Proactive approaches to combat lack of regulatory clarity and inadequate ESG data in private debt.</li> <li>- Comparing approaches for syndicated loans, direct lending loans, and sustainability linked loans.</li> </ul> <p><b>Kristina Matthews</b>, Head of Investor Relations &amp; ESG, <b>Brightwood Capital Advisors</b> <b>Katie Green</b>, Deputy Chief Investment Officer, <b>State of Vermont</b> <b>Tess Virmani</b>, Deputy General Counsel &amp; EVP, Public Policy, Head of ESG, <b>Loan Syndications and Trading Association</b></p>
<p><b>15:10</b> <b>Debate: is launching an impact strategy detrimental to wider sustainability efforts?</b></p> <ul style="list-style-type: none"> <li>- Consider the reasons to launch a separate</li> </ul>	<p><b>15:10</b> <b>Case study: data understanding and retention for better ESG programs</b></p>	<p><b>15:10</b> <b>Working session</b></p>	<p><b>15:10</b> <b>Infrastructure and the energy transition</b></p> <ul style="list-style-type: none"> <li>- The current state of the infrastructure market and detail the significant trends</li> </ul>

Visit the [agenda page](#) for the latest updates.

For programme information contact Erin Wolfe [erin.w@peimedia.com](mailto:erin.w@peimedia.com)

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<p>impact strategy vs. addressing sustainability throughout the fund</p> <ul style="list-style-type: none"> <li>- Are ESG and impact differentiated enough for separated strategies?</li> <li>- The implications for ESG specialists on evolving approaches</li> </ul>			<p>affecting the asset class and what to expect coming up in 2023.</p> <ul style="list-style-type: none"> <li>- The importance of moving away from fossil fuel investments and into more renewable energy resource investments</li> </ul> <p><b>Eric Newman</b>, Treasury Manager, <b>City of Stamford</b></p>
<p><b>15:40</b> <b>Networking break</b></p>			
<p><b>16:10</b> <b>Building ethical and impactful supply chains for better returns</b></p> <ul style="list-style-type: none"> <li>- Deeper understanding of supply chains as they pertain to eco-system and human rights considerations.</li> <li>- Navigating conflict zones and risk mitigation strategies for investors in these territories.</li> <li>- Understanding of enforcement for business done in unsanctioned regions internationally.</li> </ul>	<p><b>16:10</b> <b>Case study</b></p>	<p><b>16:10</b> <b>Working session</b></p>	<p><b>16:10</b> <b>The U.S. real estate market: opportunities for return</b></p> <ul style="list-style-type: none"> <li>- deep dive into the current state of the housing market after months of inflation and increased interest rates.</li> <li>- capitalizing on strong cash flows of those in affordable housing programs.</li> <li>- the potential to create a real estate investment portfolio that has a high net operating income and produces solid returns on investment.</li> </ul>
<p><b>16:50</b> <b>Impact</b></p>	<p><b>16:50</b> <b>Case study</b></p>	<p><b>16:50</b> <b>Working session</b></p>	<p><b>16:50</b> <b>Venture</b></p>

# Responsible Investment Forum New York 2023

**17:30**

**Close of day one of conference followed by networking reception**

## **Day two: 2 March**

**08:00**

**LP Think Tank Breakfast in partnership with ILPA**

**Matt Schey**, Senior Director, Sustainable Investing & Strategic Projects, **ILPA**

**GP Think Tank Breakfast**

**09:00**

**Chair's remarks**

**Peter Dunbar**, Head of Private Equity, **UNPRI**

**09:05**

**Opening keynote**

**09:35**

**European influence: learnings from across the pond**

- With Europe being traditionally ahead of the U.S. on responsible investing initiatives, what can we learn from our European counterparts and how are we implementing ideas coming out of the region?
- How is recent ESG regulation in the EU bound to affect ESG regulation in the U.S.?

**10:15**

**Networking break**

**10:45**

**Rising importance of standardized ESG metrics and frameworks**

- Creating long term financial performance by focusing on key success factors including carbon metrics, financial and business metrics, and governance metrics.
- Pros and cons to developing consistent and universal metrics
- Metrics in action case study examples

**Jeffrey Cohen**, Managing Director, Head of ESG & Sustainability, **Oak Hill Advisors**

**Sanaz (Kafayi) Raczynski**, Head of Sustainability / ESG, **Kohlberg & Compan**

**Ashley McNamee**, Director of ESG, **Revelstoke Capital Partners**

# Responsible Investment Forum New York 2023

**11:25**

## **Investing in the next generation**

- Opportunities for partnerships and investments led by the private equity sector.
- Where are the next investment opportunities and who is ready to invest?
- How do we leverage millennial and gen z investors to push forward sustainability initiatives?
- Increased focus on investments that combat civil rights, antiwar, and environmental movements.

**Tynesia Boyea-Robinson**, President, and CEO, **CapEQ**

**12:05**

## **Recognizing greenwashing in private markets**

- Discrepancies across markets on what constitutes greenwashing and how we can address and streamline standards.
- Understanding the role of data and reporting to prove sustainability efforts.
- Tangible ways to avoid greenwashing and protect your firm.

**Jennifer Wildroutd**, Vice President of ESG, **Sun Capital Partners**

**12:45**

**End of conference and lunch**