

Impact Investor Summit North America 2023

The Impact Investor Global Summit North America 2023

The next generation of sustainable investment

31 October – 1 November

Day one: Tuesday 31st October

8.00 Networking breakfast

8.55 Chair's opening remarks

9.00 **Opening keynote**

Todd Cook, Managing Partner, **Bain Capital Double Impact**

9.20 **State of the market: the evolution of impact investing in North America**

- ESG vs impact investing: how clear is the distinction in the market?
- What are the implications of the ESG backlash on impact investing?
- How are macroeconomic challenges such as inflation and rising interest rates going to affect impact investing?
- What opportunities have been opened because of enabling legislation such as the Inflation Reduction Act?

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

Mark Berryman, Managing Director of Impact Investing, **Caprock**

Andrew Lee, Managing Director, Global Head of Sustainable and Impact Investing, **UBS Global Wealth Management**

Michael Eisenberg, Partner, ESG Services Lead, **ERM**

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

10.00 **Institutional investor panel: the role of impact in LP portfolios in the coming decade**

- What are the allocation priorities of institutional investors?
- What is the opportunity universe and how are allocators filtering their investing strategies?
- Does the term 'impact' still connote as 'concessionary' in LP minds?

Impact Investor Summit North America 2023

- What issues are getting funding, and which aren't?

Jessica Pan, Senior Portfolio Manager - Private Equity, **APG Asset Management**

Jonathan Hirschtritt, Managing Director, Sustainability, **GCM Grosvenor**

Preeti Bhattacharji, Head of Sustainable Investing, US Private Bank, **JPMorgan Chase & Co.**

Régine Clément, President and Chief Executive Officer, **CREO Syndicate**

François Crémet, Senior Director of Sustainable Investing, **CDPQ**

10.45 Break

11.15 **Climate investing & the Inflation Reduction Act (IRA): digesting the investment opportunity landscape**

- What is the scale of investment opportunity that is present because of the Inflation Reduction Act?
- What investment opportunities has the IRA legislation enabled?
- What verticals and types of assets are investors most looking to get exposure to?
- Will there be copycat legislation in Europe to accelerate the decarbonisation and the clean energy transition?

Bhavika Vyas, Managing Director, Impact Investing, **Stepstone Group**

12:00 **Keynote #2**

Greg Shell, Head of Inclusive Growth Strategy, **Goldman Sachs**

12.15 **The evolution of impact managers: specialisation, emerging themes, and opportunities**

- Have the generalists fallen out of favour, and are thematic funds the future of the market?
- How and where are managers deploying capital in the current macroeconomic climate?
- Which investment propositions are resonating most with impact allocators?
- Where are managers looking to differentiate themselves?

Robert Schultz, Partner, **Capricorn**

Marieke Spence, Executive Director, **Impact Capital Managers**

Jennifer Kenning, CEO & Co-Founder, **Align Impact**

12.45 Lunch

Impact Investor Summit North America 2023

After lunch the conference splits into three streams, the streamed sessions are designed for you to hear about the latest investment opportunities from 'best-in-theme' managers and get detailed insights on innovations on the horizon.

	Environmental impact	Inequality impact	Impact innovation
13.30	<p>Emerging tech in climate investing: where is the smart capital being deployed?</p> <p>Steve Hellman, Managing Partner, Mobility Impact Partners</p> <p>Temple Fennell, Principal Family Member, Keller Family Office</p> <p>Melissa Cheong, Managing Partner, Blackcorn Ventures</p>	<p>Scaling solutions to inequality: what models of change are taking off?</p> <p>Jack Moriarty, Founder & Executive Director, Ownership America</p> <p>Philip Reeves, Founding Partner, Apis & Heritage Capital Partners</p> <p>Delilah Rothenberg, Co-Founder & Executive Director, The Predistribution Initiative</p>	<p>The future of corporate investors in the impact market</p>
14.30	Switchover break		
14.35	<p>Impact in food systems and sustainable agriculture</p>	<p>Next phase of DE&I: what investable models of change are taking DE&I investing to the next level?</p> <p>Roraj Pradhananga, Partner, Managing Director of Research, Veris Wealth Partners</p> <p>Sheena Strawter-Anthony, Director of Impact Investment Strategy,</p>	<p>Impact fundraising in difficult times</p> <p>Edward Powers, Managing Director, HarbourVest Partners</p>

Impact Investor Summit

North America 2023

		William Caspar Graustein Memorial Fund	
15.20	Extended networking break		
16.00	<p>Impact opportunities in the energy transition and electrification</p> <p>Peter Penner, Chief Impact Officer, Energy Impact Partners</p> <p>Matthew Lobach, Partner, ERM</p>	<p>Healthcare impact: an overview of leading investments</p> <p>Andrea Biernat, Principal, Impact Investing, Apollo Global Management</p> <p>Gabrielle Rubenstein, Co-Founder & Managing Partner, Manna Tree Partners</p> <p>Lucas De Breed, Director, American Cancer Society's BrightEdge Fund</p>	<p>Creating impact: aligning intention, incentives and outcomes</p> <p>Chris Walker, Senior Advisor, Sustainable Retirements, Intentional Endowments Network</p>
16.45	Switchover break		
16.50	<p>Impact in food systems and sustainable agriculture</p> <p>Brad Jakeman, Founding Managing Partner, Rethink Food</p>	<p>Education, workforce and better work impact funds: overview of investment stories</p> <p>Sheena Strawter-Anthony, Director of Impact Investment Strategy, William Caspar Graustein Memorial Fund</p>	<p>Circularity impact: investing for a circular economy</p> <p>Tom Jorgensen, Managing Director, North Sky Capital</p> <p>Tazia Smith, Chief Operating Officer & Head of Capital Partnerships, Closed Loop Partners</p>

17.40 Networking drinks

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

For programme information contact Boris Petrovic boris.p@peimedia.com

Impact Investor Summit North America 2023

18.30 Sponsored dinner

Day two: Wednesday 1st November

7.30 Networking breakfast

8.00-9.15 **LP working group session (closed door, invite only)**

9.15 **Artificial intelligence & impact investing: trying to get ahead of the AI curve**

- How is AI affecting impact portfolio companies currently?
- What is the extent of risks and opportunities to portfolios from AI and automation?
- How can AI help deal with the complexity of impact data, benchmarking and reporting?
- How are impact manager bracing themselves for the scale and pace of change brought about by AI?

Abrielle Rosenthal , Managing Director, Chief Sustainability Officer, Chief Human Resources Officer, **TowerBrook Capital Partners**

10.00 Morning networking break

10.30 **Taking impact management to the next level: an overview of innovations and challenges**

- How are managers addressing the need to balance reporting on impact vs delivering impact?
- What strategies are managers using in quantifying and demonstrating impact?
- What is the role of technology, AI and predictive analytics in impact measurement?

Diane Damskey, Head of Secretariat, **Operating Principles for Impact Management**

Jennifer Pryce, President and CEO, **Calvert Impact**

Chavon Sutton, Senior Investment Director, Sustainable & Impact Investing Research, **Cambridge Associates**

11.15 **Evolving regulatory landscape in the US and beyond: implications for fund marketing and reporting**

- What are the implications of the SEC's rulings on impact funds?
- How are US funds fundraising in Europe approaching alignment with SFDR?

Impact Investor Summit North America 2023

- How are funds classifying themselves and what does it mean in practice e.g. article 8 vs 9?
- To what extent can regulation address impact washing in the market?

Menaka Nayar, Associate, **Kirkland & Ellis**

12.00 **Keynote #3**

Brian J. Kernohan, Chief Sustainability Officer, Private Markets, **Manulife Investment Management**

12.30 Lunch

13:30 **Data presentation**

13:45 **Integrity in the impact market: how to ensure validity of impact claims?**

- How much of an issue is 'impact washing' at present?
- What is the role of assurance and verification at present in validating impact claims?
- What frameworks and mechanisms are LPs using to assess the their impact manager to what they say?

Brandon Zeigler, Director of Impact Investments, **Global Endowment Management**

Mike McCreless, Founder and Executive Director, **Impact Frontiers**

Diane Kulju, Associate Director of IMM & Research, **Impact Capital Managers**

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

Priya Parrish, Partner and Chief Investment Officer, **Impact Engine**

14:30 **Impact standardisation: Progress in impact harmonisation and data operability**

- Will impact measurements ever reach a financial reporting standard?
- What frameworks are leading impact funds using to demonstrate impact and how comparable are these from an investor's perspective?
- How will data, metrics and reporting practice develop in the coming years?
- Where is innovation still required on benchmarking?

Luyen Doan Tran, Chief Development Impact Officer, **IFC**

Megan Starr, Global Head of Impact, **Carlyle**

Jessie Duncan, Program Director, **Tipping Point Fund on Impact Investing**



New
Private Markets

Impact Investor Summit North America 2023

15:15 **Integrating impact into a value creation strategy**

- To what extent do value creation plans and impact creation plans need to be integrated?
- How do funds influence portfolio companies to deliver impact performance through incentives and board composition?
- What support do you need to provide for portfolio company management to deliver against impact goals?

16.00 Closing remarks

16.10 End of conference