

# Impact Investor Summit North America 2023

31 Oct-1 Nov 2023  
New York City, USA

[View the event website here](#)

Draft agenda

## Day one – Tues 31<sup>st</sup> October

8.00 Networking breakfast

8.55 Chair's opening remarks

9.00 **Keynote interview: The direct relationship between commercial growth and impact**

- The industry has matured to the point where we are likely to see the first true wave of exits in the coming years – what are we expected to learn?
- What is the ideal role of an impact investor throughout the lifecycle of a portfolio company partnership?
- Are there enough mission-driven companies to benefit growing competition among impact investors?
- How are impact investors navigating competition for assets?

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

John Ancona, Head of Private Equity Due Diligence, **J.P. Morgan Private Bank**

Moderator: Snehal Shah, Senior Reporter, **New Private Markets**

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

- How has impact investing evolved since the term was formalized ~ 2006?
- How have the sustainable development goals (SDGs) influenced the impact investing landscape?
- What headwinds and opportunities does impact investing face (e.g. Inflation Reduction Act)?
- What are highlights and challenges across sectors?
- What do asset owners expect from impact investors?

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**

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

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## 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 connotate as 'concessionary' in LP minds?
- 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**

Moderator: Toby Mitchenall, Editor, **New Private Markets**

## 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**

Maria Kozloski, Senior Vice President of Innovative Finance, **The Rockefeller Foundation**

Robert Schultz, Partner, **Capricorn**

Moderator: Anna Dayn, Managing Partner, **New End**

## 12.00 Inclusive growth trends and opportunities in private market

- Why is investing for inclusive growth important?
- How can impact and other types of investors participate in this theme?
- What sorts of investment opportunities are inclusive?

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

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## 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?

Salome Makharadze, Managing Director, Alternatives Capital Markets and Strategy Group, **Goldman Sachs**

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

Edward Powers, Managing Director, **HarbourVest Partners**

**CIM**, speaker TBC

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

## 13.00 Lunch

After lunch the conference splits into two 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.

	Stream A	Stream B
14.00	<p><b>Emerging tech in climate investing: where is the smart capital being deployed?</b></p> <p>Steve Hellman, Managing Partner, <b>Mobility Impact Partners</b></p> <p>Temple Fennell, Principal Family Member, <b>Keller Family Office</b></p> <p>Micah Kotch, Partner, <b>Blackhorn Ventures</b></p> <p>Moderator: Snehal Shah, Senior Reporter, <b>New Private Markets</b></p>	<p><b>Scaling solutions to inequality: what models of change are taking off?</b></p> <p>Jack Moriarty, Founder &amp; Executive Director, <b>Ownership America</b></p> <p>Philip Reeves, Founding Partner, <b>Apis &amp; Heritage Capital Partners</b></p> <p>Delilah Rothenberg, Co-Founder &amp; Executive Director, <b>The Predistribution Initiative</b></p> <p>David Lynn, Co-Founder &amp; CEO, <b>Mission Driven Finance</b></p>
14.50	<p><b>Natural capital and nature-based solutions: believe the investment hype?</b></p>	<p><b>Healthcare impact: an overview of leading investments</b></p>

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	<p>Brandon Lewis, Director of Sustainability, Timberland &amp; Agriculture, <b>Manulife Investment Management</b></p> <p>Thomas Belazis, Director, <b>The Rockefeller Foundation</b></p>	<p>Andrea Biernat, Principal, Impact Investing, <b>Apollo Global Management</b></p> <p>Gabrielle Rubenstein, Co-Founder &amp; Managing Partner, <b>Manna Tree Partners</b></p> <p>Lucas De Breed, Director, <b>American Cancer Society's BrightEdge Fund</b></p>
16.00	<p><b>Impact opportunities in the energy transition and electrification</b></p> <p>Peter Fox Penner, Chief Impact Officer, <b>Energy Impact Partners</b></p> <p>Matthew Lobach, Partner, <b>ERM</b></p> <p>Jason Scott, Entrepreneur In Residence, <b>Spring Lane Capital</b></p>	<p><b>Next phase of DE&amp;I: what investable models of change are taking DE&amp;I investing to the next level?</b></p> <p>Roraj Pradhananga, Partner, Managing Director of Research, <b>Veris Wealth Partners</b></p> <p>Sheena Strawter-Anthony, Director of Impact Investment Strategy, <b>William Caspar Graustein Memorial Fund</b></p> <p>Katie Wu, Associate Director, Sustainable Investing, Private Markets, <b>Manulife Investment Management</b></p> <p>Moderator: Nate Wong, Partner, <b>The Bridgespan Group</b></p>
16.45	<p><b>Impact in food systems and sustainable agriculture</b></p> <p>Brad Jakeman, Founding Managing Partner, <b>Rethink Food</b></p> <p>Tripp Wall, Founding Partner, <b>Trailhead Capital</b></p> <p>Cristian Norambuena, Director Private Equity, <b>Tikehau Capital</b></p>	<p><b>Circularity impact: investing for a circular economy</b></p> <p>Tom Jorgensen, Managing Director, <b>North Sky Capital</b></p> <p>Tazia Smith, Chief Operating Officer &amp; Head of Capital Partnerships, <b>Closed Loop Partners</b></p>

17.40 Networking drinks

18.30 Sponsored dinner

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## Day two Wednesday 1<sup>st</sup> November

7.30 Networking breakfast

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

09.00 Chair's day two opening remarks

09.05 **Built for impact: aligning intention, incentives and fund structures to deliver impact outcomes**

- What are some of the best practices in executing a credible impact creation plan?
- Are we seeing a link between greater impact and higher valuations of assets?
- How are funds defining and implementing the *intentionality* principle in their strategy?
- To what extent are incentives needed on the fund- and asset-levels?

Chris Walker, Senior Advisor, Sustainable Retirements, **Intentional Endowments Network**

Semiray Kasoolu, Head of Impact Solutions, **Y Analytics**

Amy Wang, Head of Private Credit, **Blue Earth Capital**

09.45 **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**

Christina Leijonhufvud, CEO, **BlueMark**

Moderator: Anne Matuszewicz, Co-Head of ESG & Impact Strategy, **Cority**

10.30 **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?
- How are funds classifying themselves and what does it mean in practice e.g. article 8 vs 9?



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- To what extent can regulation address impact washing in the market?

Daniel D'Ambrosio, Partner, **Kirkland & Ellis**

Jennie Morawetz, Partner, **Kirkland & Ellis**

Moderator: Snehal Shah, Senior Reporter, **New Private Markets**

11.00 Networking break

## 11.30 **Rising inequality: a global sustainability challenge that needs our attention**

Rising inequality presents a challenge for human rights globally while also limiting the potential for achieving the UN SDG's. In this session our keynote speaker will explore:

- How can private markets as a sector take action to address inequality?
- How can portfolio businesses be prepared to disclose social risks and impacts?
- What approaches can investors take to incorporate social factors into investing for social equity?

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

## 11.45 **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**

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

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

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

## 12.30 **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?

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- 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**

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

13.15 Networking lunch & end of conference

14.00 End of conference