



Innovation, Collaboration, Leadership

the Americas

AGENDA

June 2nd 2021

8.30 - 5.30 EDT

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This conference is eligible for credits based on sessions attended, CFA Institute members are encouraged to self-document such credits in their online PL tracker." link is <https://cpd.cfainstitute.org/>

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*Rich mixture of interactive sessions.
Including: Panel Sessions, polls,
keynote speakers, Q&A, expo booths,
Networking and private 1-2-1 sessions.*

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1. WELCOME & EVENT GUIDE

Welcome to the Americas

Welcome to the Americas 2021, the virtual symposium which brings together the best and the brightest from the global asset community to share their insights & knowledge about both the challenges and opportunities within Responsible Investing.

Get comfortable, pick the sessions you want to join, request 1-2-1 meetings with key people, network with your peers, visit the exhibition booths and join various breakout sessions.

- Innovation
- Collaboration
- Leadership

This guide shows you the type of content going on throughout the day, as well as where & when to find it, how to make sure you get the most out of your day and some pop up surprises keep your eyes peeled!

We look forward to seeing you there,

Adrienne Lawler
CEO & Founder
Responsible Asset Owners Global Symposium



1. WELCOME & EVENT GUIDE

All sessions will be recorded and shared after the event



Reception

Consider this Base Camp as you explore all the options available throughout the day - or indeed, even if you get lost!

There will always be someone on hand to help & guide you as well as an excellent place to meet for a chat, keep up to date with key messages & event updates.



Stage

This is the Main stage. You will find our four keynote speaker in this area (you can read more about them in the agenda).

The live chat feature means you will be able to post comments and ask questions throughout.. At the end, the Moderator will lead the Q & A between themselves and the viewers, selecting some to ask their questions directly.



Networking

The Networking area is available throughout the day. In this symposium you can arrange private sessions with some of the speakers as well as network with fellow delegates in open areas.

The Networking area automates the discovery of new connections. When you participate in Networking, you are matched with another attendee who you can meet for a couple of minutes before connecting with another person.



Sessions

The Sessions area of the event is for PANEL sessions and for breaking into groups and rooms. We have some great sessions lined up and all detailed in the schedule below.

Up to twenty people can participate in a session on live camera, while 500 people can join the session and watch off camera. Everyone in a session can interact in the session chat. This is often to ask questions to the speakers on camera.



Expo Booths

The Expo area is the virtual exhibition hall with some great sponsors booths.

It's where you'll find a wide array of brands, products or services, just like a trade fair, job fair, or sponsor showcase.

Definitely worth a visit!

2. AGENDA

Agenda timings are EDT
but will be shown in YOUR local time
on the platform.

08:30 - 08:55 - Reception and registration

Check in, grab a coffee, network with peers, check out the Agenda!

08:55 - 09:00 - Main Stage - Welcome & Opening Address

Adrienne Lawler - Broadcaster, BBC, Sky & CNN



09:00 - 09:40



PANEL SESSION
Emerging Market opportunities
built on ESG Investing

Moderator:

John Mulligan
Director
WGC

Panellists:

Ricardo Torresi
Managing Director
Regional Investment Latin America
Zurich Insurance

Egon Vavrek
Director Global Emerging Markets Equities
APG Asset Management

Suzanne Bishopric
Managing Partner
Global Sovereign Advisors

09:00 - 09:40



PANEL SESSION
Regulation or persuasion

Moderator:

Bill Kelly
President
CAIA

Panellists:

Nina Chen
Sustainability & Climate Initiatives Director
NY State Dept Financial Services

Anne Simpson
Managing Investment Director
CalPERS

09:00 - 09:40



NETWORKING
40 Minutes speed Networking

09:00 - 09:40



EXPO BOOTH

2. AGENDA

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09:40 - 09:45 - Reception

Delegates select next session

09:45 - 10:30



PANEL SESSION:
Integrating ESG & sustainability
investments to address climate
change as a key priority

Moderator:

Bill Kelly
President
CAIA

Panellists:

Egon Vavrek
Global Emerging Markets
APG AM

Meera Pandit
Vice President
JPMorgan AM

Elena Manola-Bonthond
CIO
CERN Pension Fund

09:50 - 10:35



PANEL SESSION
Collaboration to improve
investor understanding

Moderator:

Dr Bronwyn King
Founder Tobacco Free Portfolios

Panellists:

Richard Lacaille
Senior Investment Advisor and Global Head of ESG
State Street

Nic Firzli
Director General
World Pensions Council

Diego Lopez
MD
Global SWF

09:55 - 10:40



FIRESIDE CHAT
Increasing female representation
in portfolio management

**Fireside chat
between**

Tracy Castle Newman
COO
Morgan Stanley IM

&

Seema Hingorani
Managing Director
Morgan Stanley IM

09:00 - 09:40



NETWORKING
40 Minutes speed Networking

2. AGENDA

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10:40 - 10:45 - Reception

Delegates move to stage for next session

10:45 - 11:30 - Main Stage

Dr David Kelly, Chief Global Strategist, JPMorgan AM

The economic recovery in the wake of the pandemic.

11:30 - 11:35 - Delegates select next session



11:35 - 12:15



SYNDICATE SESSION

Responsible Investment Product Selection:
How disclosure standards can address
current challenges

Moderator:

Chris Fidler
Senior Director
Global Industry Standards CFA

It is often an arduous process for responsible asset owners to find investment products that match their investment policy statement. Investment product disclosures are inconsistent and due diligence questionnaires are often not effective. In this session, you will be introduced to a new disclosure standard applicable to all types of products in all markets. Learn how asset owners can ensure they receive information that is a complete and faithful representation of an investment product.

11:35 - 12:15



FIRESIDE CHAT

Shedding light on ESG
and index providers

**Fireside chat
between**

Joan Hull
Director
WGC



Hortense Bioy
Director Passive Strategies & Sustainability Research
Morningstar

11:35 - 12:15



PANEL SESSION

Leadership & Culture

Moderator:

John Bowman
Snr Managing Director
CAIA

Panellists:

Chris Ailman
CIO
CalSTRS

Michelle Ostermann
Vice Chair
International Centre for Pension Management

Elizabeth Burton
CIO
Hawaii Employees' Retirement System

11:35 - 12:15



NETWORKING

40 Minutes speed Networking

2. AGENDA

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12:15 - 12:20 - Reception

Delegates move to stage for next session

12:20 - 13:05 - Main Stage

David Bodanis, Author

The art of fairness, the cost of inequity



13:05 - 13:35 - Lunch & Delegates select next session

13:35 - 14:20

13:40 - 14:25

13:35 - 14:20



PANEL SESSION

Build back better

Moderator:

Heidi Ridley
Co-Founder
Radiant ESG

Panellists:

Paul Horrocks
Private Investment
OECD-OCDE

Herman Brill
CIO at Investment Management
United Nations Pension Fund

Dr Judith Rodin
Author, Former President
Rockefeller Foundation



PANEL SESSION

The role of global standard setters
and index publishers in adopting
common standards

Moderator:

Eric Hoespenheide
Chair
GRI

Panellists:

Mattheu Verougstraete
Economics Affairs Officer
United Nations

Eila Kreivi
Director & Capital Markets Head
European Investment Bank

Laura Frigenti
Global Head Intl. Dev. Assistance Services Inst.
KPMG



EXPO BOOTHS

2. AGENDA

Agenda timings are EDT
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14:25 - 14:30 - Reception

Delegates move to stage for next session



14:30 - 15:15 - Main Stage

Marg Franklin, President and CEO, CFA Institute

The opportunity for the financial community to bring about change we want to see



15:15 - 15:20 - Delegates select next session

15:20 - 16:05



SYNDICATE ROOM

15:20 - 16:05



PANEL SESSION
Unintended consequences

Moderator:

Kathryn McDonald
Co-Founder
Radiant ESG

Panellists:

Dr Bronwyn King
Founder, Tobacco Free Portfolios

Ben Page
CEO, Ipsos MORI

Bob Smith
Pres & CIO, Sage Advisory Services

Harald Walkate
Head of Responsible Investment (ESG) Natixis IM

15:20 - 16:05



PANEL SESSION
The risk & opportunities
of climate change

Moderator:

Andrew Wilde
Global Chair of Financial Services
Edelman

Panellists:

Laura Craft
Snr VP Global ESG Strategy, Heitman

Tapiwa Sikipa
Senior Portfolio Manager, World Bank

Simona Paravani
Global CIO, Solutions Multi-Asset Strategies & Solutions,
BlackRock

15:20 - 16:05



NETWORKING
40 Minutes speed Networking

2. AGENDA

Agenda timings are EDT
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16:05 - 16:10 - Reception

Delegates move to stage for next session

16:10 - 16:55 - Main Stage

Jane Nelson, Director Corporate Responsibility Initiative, Harvard Kennedy Business School
Accelerating the sustainability transition: The leadership role of responsible asset owners

17:00 - 17:30 Networking and wrap up



3. QUICK GUIDE TO THE DAY

Agenda timings are EDT
but will be shown in YOUR local time
on the platform.

MODERATOR	PANELS	TIMES	PANELISTS	MODERATOR	PANELS	TIMES	PANELISTS
ADRIENNE LAWLER Founder RAOG 	<i>Welcome</i>	08:55 – 09:00		JOAN HULL Director WGC 	FIRESIDE CHAT		
JOHN MULLIGAN Director WGC 	<i>Emerging Market opportunities built on ESG Investing</i>	09:00 – 09:40	Ricardo Torresi Egon Vavrek Suzanne Bishopric	HORTENSE BIOY Director Passive Strategies & Sustainability Research Morningstar 	<i>Shedding light on ESG and index providers</i>	11:35 – 12:15	
BILL KELLY President CAIA 	<i>Regulation or persuasion</i>	09:00 – 09:40	Nina Chen Anne Simpson	DAVID BODANIS Author 	KEYNOTE <i>The art of fairness, the cost of inequity</i>	12:20 - 13:05	
	<i>Integrating ESG, sustainability & climate change into investment strategies</i>	09:45 – 10:30	Egon Vavrek Meera Pandit Elena Manola-Bonthond				
DR BRONWYN KING Founder Tobacco Free Portfolio 	<i>Collaboration to improve investor understanding</i>	09:50 – 10:35	Richard Lacaille Nic Firzli Diego Lopez	HEIDI RIDLEY Co-Founder Radiant ESG 	<i>Build back better</i>	13:35 – 14:20	Paul Horrocks Herman Bril Dr Judith Rodin
TRACY CASTLE NEWMAN COO Morgan Stanley IM 	FIRESIDE CHAT <i>Increasing female representation in portfolio management</i>	09:55 – 10:40		ERIC HESPENHEIDE Chair GRI 	<i>The role of global standard setters and index publishers in adopting common standards</i>	13:40 – 14:25	Mattheu Verougastraete Eila Kreivi Laura Frigenti
SEEMA HINGORANI Managing Director Morgan Stanley IM 							
DR DAVID KELLY Chief Global Strategist, JPMorgan AM 	KEYNOTE <i>The economic recovery in the wake of the pandemic.</i>	10:45 - 11:30		MARG FRANKLIN President and CEO CFA Institute 	KEYNOTE <i>The opportunity for the financial community to bring about change we want to see</i>	14:30 - 15:15	
CHRIS FIDLER Senior Director Global Industry Standards CFA 	SYNDICATE SESSION <i>Responsible Investment Product Selection: How disclosure standards can address current challenge</i>	11:35 - 12:15		KATHRYN MCDONALD Co-Founder Radiant ESG 	<i>Unintended consequences</i>	15:20 – 16:05	Dr Bronwyn King Ben Page Bob Smith Harald Walkate
JOHN BOWMAN Snr Managing Director CAIA 	<i>Leadership & Culture</i>	11:35 – 12:15	Chris Ailman Elizabeth Burton Michelle Ostermann	ANDREW WILDE Global Chair of Financial Services Edelman 	<i>The risk & opportunities of climate change</i>	15:20 – 16:05	Laura Craft, Tapiwa Sikipa Simona Paravani
				JANE NELSON, Director CRI Harvard Kennedy Business School 	KEYNOTE <i>Accelerating the sustainability transition: The leadership role of responsible asset owners</i>	16:10 - 16:55	

- NOTES:**
- Depending on participants, sessions can be extended beyond the listed time by the Moderator if requested.
 - All delegates can pose a question in the chat area
 - Go to <https://rao-global.appointlet.com/s/10-min-chat> see who is available for 1-2-1 meetings

4. SPEAKERS AVAILABLE FOR 1-2-1's



David Bodanis,

Author



Bill Kelly

President
CAIA



John Mulligan

Director
WGC



Meera Pandit

Vice President
J.P. Morgan
Asset Management



Heidi Ridley

Co-Founder
Radiant ESG



Eila Kreivi

Director & Capital
Markets Head
European Investment Bank



Diego Lopez

MD
Global SWF



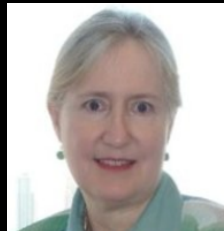
JOAN HULL

Director
WGC



Ricardo Torresi

Managing Director
Regional Investment Latin America
Zurich



Suzanne Bishopric

Managing Partner
Global Sovereign Advisors



Michelle Ostermann

Vice Chair
ICPM



Bob Smith

Co-Founder
Sage



Harald Walkate

Natixis Investment Manager



Dr Bronwyn King

Founder
Tobacco Free Portfolio

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With thanks to our Sponsors

