

Monday, September 24 | 7:30am – 5:30pm

Asset Owner Series

Climate and ESG Asset Owner Summit

Including the Launch of PRI & CFA Institute's Report on ESG Integration in the Americas

A CLIMATE WEEK NYC event | TOM BRIGANDI'S 70th Society Event & 13,000th Attendee

Agenda

7:30 AM | REGISTRATION & CONTINENTAL BREAKFAST

7:50 AM | MASTERS OF CEREMONY INTRODUCTION

[THOMAS BRIGANDI](#), Global Asset Owner Series Founder and Lead Organizer, [CFA SOCIETY NEW YORK](#)
[HENRY SHILLING](#), Chair, Sustainable Investment Thought Leadership Group, [CFA SOCIETY NEW YORK](#)
[DANIEL FRIDSON](#), Family Member, Fridson Family Office

7:55 AM | WELCOME ADDRESS

[CHRISTOPHER CUTLER](#), Vice Chairman, [CFA SOCIETY NEW YORK](#)

8:00 AM | SPECIAL GUEST KEYNOTE ADDRESS

[PAUL SMITH, CFA](#), Chief Executive Officer, [CFA INSTITUTE](#)

8:30 AM | KEYNOTE ADDRESS

[JESSICA FRIES](#), Executive Chairman, [ACCOUNTING FOR SUSTAINABILITY \(A4S\)](#)

9:00 AM | APAC & AMERICAS NON-US PANEL

Introduced by: TBD

Moderator

[CHRIS FOWLE](#), Head of Americas, [PRINCIPLES FOR RESPONSIBLE INVESTMENT](#)

Panel

[JAMES LOGUSH, CFA](#), Managing Director, [CANADIAN PENSION PLAN INVESTMENT BOARD \(CPPIB\)](#)
[HIROSHI OZEKI](#), Managing Executive Officer, Americas and Europe, [NIPPON LIFE INSURANCE COMPANY](#)
[HILEN GABRIELA MEIROVICH](#), Head of Climate Change, [INTER AMERICAN DEVELOPMENT BANK INVEST](#)

10:15 AM | BREAK

10:30 AM | EUROPEAN ASSET OWNER ESG PERSPECTIVES

Introduced by: TBD

Moderator

[M. NICOLAS J. FIRZLI, LL.M.](#), Director-General, [WORLD PENSIONS COUNCIL \(WPC\)](#); & Advisory Board Member, [WORLD BANK GLOBAL INFRASTRUCTURE FACILITY \(WB GIF\)](#)

Panel

[ANNA POT](#), Manager, Responsible Investments, [APG ASSET MANAGEMENT N.V.](#)
[CHRIS LIMBACH](#), Managing Director, [PGGM](#)
(tentative) [Eila Kreivi](#), Head of Capital Markets, [EUROPEAN INVESTMENT BANK \(EIB\)](#)
[ADAM PHILLIPS](#), [UNITED NATIONS JOINT STAFF PENSION FUND \(UNJSPF\)](#)

11:40 AM | SPECIAL ADDRESS

[WILL GOODHART](#), Chief Executive Officer, [CFA SOCIETY UNITED KINGDOM](#)

11:50 AM | U.S. ASSET OWNER ESG PERSPECTIVES

Introduced by: TBD

Moderator

[MERCER INVESTMENTS](#)

Panel

[BRIAN RICE](#), Portfolio Manager, Corporate Governance Department, [CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM \(CALSTRS\)](#)
[DIVYA MANKIKAR](#), Head of ESG Integration, [CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM \(CALPERS\)](#)
[AMY O'BRIEN](#), Head of Responsible Investment, [TIAA](#)
[ANDREW RUSSELL](#), Director of Fixed-Income Investments for the [PENSION BOARDS – UNITED CHURCH OF CHRIST \(PB-UCC\)](#)

1:00 PM | LUNCH

1:40 PM | WHY IS CLIMATE CHANGE BAD: DROUGHT AND FLOOD

[MATTHEW J. DISERIO](#), President and Co-Founder, [WATER ASSET MANAGEMENT](#)

1:45 PM | [G7 INVESTOR GLOBAL INITIATIVES](#) PANEL

Introduced by: TBD

1. Enhancing expertise in infrastructure financing and development in emerging and frontier economies;
2. Opening opportunities for women in finance and investment worldwide; and
3. Speeding up the implementation of uniform and comparable climate-related disclosures under the FSB-TCFD framework.

Moderator

[ED HULINA](#), Head, Global Institutional Partnerships, [CFA INSTITUTE](#)

Panel

[CHRIS LIMBACH](#), Managing Director, [PGGM](#)

[JÉRÔME LUSSIER](#), Director, Investment Stewardship, [CAISSE DE DÉPÔT ET PLACEMENT DU QUÉBEC \(CDPQ\)](#)

2:30 PM | ESG ASSET OWNER PARTNERSHIP BETWEEN THE FINANCIAL AND POLITICAL CAPITALS OF THE WORLD – CFANY AND CFA WASHINGTON DC

[BILL SCOTT, CAE](#), Chief Executive Officer, [CFA SOCIETY WASHINGTON, DC](#)

2:35 PM | ESG ANALYTICS & PRI/ESG AMERICAS REPORT HIGHLIGHTS

Introduced by: TBD

Moderator

[MATT ORSAGH, CFA, CIPM](#), Director of Capital Markets Policy, [CFA INSTITUTE](#)

Panelists

[JUSTIN SLOGGETT](#), Head of Public Markets, [PRINCIPLES FOR RESPONSIBLE INVESTMENT](#)

3:00 PM | BREAK

3:15 PM | SPECIAL ADDRESS

TBD

3:25 PM | AFRICAN ASSET OWNER ESG PERSPECTIVES

Introduced by: TBD

Moderator

[HUBERT DANSO](#), Chief Executive Officer, [AFRICA INVESTOR \(AI\) GROUP](#) & Chairman, [CFA SOCIETY NEW YORK](#) Asset Owner Advisory Board

Panelists

[DR. DANIEL MATJILA](#), Chief Executive Officer, [SOUTH AFRICA PUBLIC INVESTMENT CORPORATION \(PIC\)](#)

[UCHE ORJI](#), Chief Executive Officer, [NIGERIA SOVEREIGN INVESTMENT AUTHORITY \(NSIA\)](#)

[RICHARD BYARGUGABA](#), Chief Executive Officer, [NATIONAL SOCIAL SECURITY FUND \(NSSF\) UGANDA](#)

[IBRAHIMA KANE](#), Chief Executive Officer, [SOVEREIGN FUND FOR STRATEGIC INVESTMENTS \(FONSIS\) SENEGAL](#)

[ALDO TEMBE](#), Chief Executive Officer, [MOZAMBIQUE PREVIDENTE \(MOZAMBIQUE PROVIDENT\)](#)

4:25 PM | CLOSING KEYNOTE ADDRESS

[HIRO MIZUNO](#), Executive Managing Director & Chief Investment Officer, [JAPAN'S GOVERNMENT PENSION INVESTMENT FUND \(GPIF\)](#)

5:00 PM | SPECIAL GUEST CLOSING KEYNOTE ADDRESS

[FIONA REYNOLDS](#), Chief Executive Officer, [PRINCIPLES FOR RESPONSIBLE INVESTMENT](#)

5:30 PM | CLOSING REMARKS & ADJOURNMENT

[THOMAS BRIGANDI](#), Global Asset Owner Series Founder and Lead Organizer, [CFA SOCIETY NEW YORK](#)

Additional Details TBA

Overview

The systematic integration of environmental, social and governance (ESG) factors into investment strategies, and investment decision making across asset classes, has been gaining traction globally. Asset owners around the world were early adopters of sustainable investment commitments, taking leadership roles—in their capacity as fiduciaries—to advocate for the achievement of long term, sustainable, risk-adjusted returns, consistent with their fiduciary duty.

In this first annual Climate and ESG Asset Owner Summit event, scheduled to take place during Climate Week in NYC, CFA Society New York (CFANY) is dedicating a full day to the rise and status of sustainable investing among asset owners, by featuring addresses and panel discussions led and informed by asset owner representatives covering five continents. These will focus on ESG trends and developments across North America, Latin America, Europe, Asia, and Africa, and offer regional perspectives, unique challenges and opportunities, and their outlooks.

Ahead of this event, CFANY, CFA Institute and 23 other CFA societies across the world have teamed up with Principles for Responsible Investment (PRI) to conduct a comprehensive 2017 global ESG integration study covering equities, bonds and sovereign debt. The study results are expected to be published in the form of four separate reports, each covering ESG trends in the Americas, Europe and APAC, supplemented by a fourth report consisting of case studies. Based on an initial analysis of the results, the report covering the Americas supports previous CFA Institute survey findings, showing that risk analysis and client demand are the main reasons for taking ESG integration into consideration in the investment process. The report's findings for the

Americas will be published in advance of the ESG Asset Owner Summit, and its conclusions will be introduced and discussed at that time.

Organizations Represented

1. Canadian Pension Plan Investment Board (CPPIB)
2. Nippon Life Insurance Company
3. APG Asset Management N.V.
4. PGGM
5. United Nations Joint Staff Pension Fund (UNJSPF)
6. Mercer Investments
7. California State Teachers' Retirement System (CalSTRS)
8. California Public Employees' Retirement System (CalPERS)
9. TIAA
10. South Africa Public Investment Corporation (PIC)
11. Nigeria Sovereign Investment Authority (NSIA)
12. National Social Security Fund (NSSF) Uganda
13. Sovereign Fund for Strategic Investments (FONSIS) Senegal
14. Mocambique Previdente (Mozambique Provident)
15. Japan's Government Pension Investment Fund (GPIF)
16. European Investment Bank (EIB)
17. Inter American Development Bank Invest
18. World Bank Global Infrastructure Facility
19. CDPQ
20. CFA Society New York
21. CFA Society United Kingdom
22. CFA Society Washington DC
23. Pension Boards – United Church of Christ (PB-UCC)
24. Principles for Responsible Investment
25. CFA Institute
26. Accounting for Sustainability (A4S)
27. Africalinvestor

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