

RI Digital: USA 2020
December 2-3

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All times are displayed in Eastern Time

DAY 1- Wednesday December 2nd

08.30 – 08.50	<p>Chair's Introduction.</p> <p>Hugh Wheelan, Co-Founder and Joint Managing Director, Responsible Investor</p> <p>Lead Sponsor Keynote: Mary Jane McQuillen, Managing Director, Portfolio Manager, Head of Environmental, Social and Governance, ClearBridge Investments</p>
09.00 – 10.15	<p>Plenary 1: The battle for shareholder democracy: who's right?</p> <ul style="list-style-type: none"> - What do the SEC's new regulations about shareholder proposals and proxy advisors mean for future proxy seasons? - How will new restrictions on the U.S shareholder proposal process affect engagement? - How does this affect stewardship? Would a more beefed up Investor Stewardship Group and Framework, or a US Stewardship code counteract these changes? <p>Speakers:</p> <ul style="list-style-type: none"> • Aeisha Mastagni, Portfolio Manager, Corporate Governance, California State Teachers' Retirement System • Mike McCauley, Senior Officer, Investment Programs and Governance, Florida State Board of Administration • Yolanda Courtines, Senior Managing Director, Partner, and Equity Portfolio Manager, Wellington Management • Samantha Ross, Founder, AssuranceMark <p>Moderator:</p> <p>Heidi Welsh, Executive Director, Sustainable Investments Institute</p>
10.25 – 10.45	<p>Keynote Interview 1: An inside look into how the SEC is supporting ESG regulation and reporting</p> <p>Allison Herren Lee, Commissioner, U.S. Securities and Exchange Commission</p> <p>Interviewed by Daniel Brooksbank, Head of Strategic Content, Responsible Investor</p>
10.55 – 12.10	<p>Plenary 2: The shut down of fiduciary choice - one step forward, two steps back?</p> <ul style="list-style-type: none"> - Given the Department of Labour's new ERISA rules, will fiduciaries of corporate pensions and 401K plans be able to uphold ESG objectives? - How does this chime with the move to more sustainable finance regulations in the EU and Canada? - Where are US sustainable finance regulations heading? <p>Speakers:</p> <ul style="list-style-type: none"> • Fran Seegull, Executive Director, US Impact Investing Alliance, Ford Foundation • David Webber, Professor of Law, Boston University • Rob Du Boff, ESG Analyst, Bloomberg Intelligence • Michael Frerichs, State Treasurer, Illinois <p>Moderator:</p> <p>Jerome Tagger, Chief Executive Officer, Preventable Surprises</p>
12.10 – 13.00	Lunch

13.00 – 13.10	Speaker of the House: Why the US and China need to fix their relationship if we are to have any chance of a sustainable future. Cary Krosinsky, Lecturer, Yale University 10 minutes Q&A with Hugh Wheelan, Co-Founder and Joint Managing Director, Responsible Investor	
	Deep Dives	Deep Dives
13.20 – 14.20	Who's afraid of Big Tech? <ul style="list-style-type: none"> - As antitrust regulators on both sides of the Atlantic scrutinise the sector, what do investors need to know about Big Tech's approach to antitrust, privacy, political interference and freedom of speech? - How can big/fin tech be deployed in support of sustainable finance? Speakers: <ul style="list-style-type: none"> • Hillary Frisch, Director, Senior Research Analyst for Information Technology, ClearBridge Investments • Simon Zadek, Sherpa to the Co-Chairs, Secretary General's Task Force on Digital Financing of the SDGs • Rob Pegoraro, Freelance Journalist, USA Today Moderator: Hugh Wheelan, Co-Founder and Joint Managing Director, Responsible Investor	How will the advent of green and transition taxonomies globally affect investment management in the US domestically and overseas? <ul style="list-style-type: none"> - What regulatory effect do the taxonomies have and how should US investors respond? - What will the spillover be into investment decisions by US asset owners? - What do the taxonomies mean for US asset managers investing into markets with taxonomies? - How might the taxonomies progress into S&G areas? Will the US respond with its own taxonomy? Speakers: <ul style="list-style-type: none"> • Richard Mattison, Chief Executive Officer, Trucost, part of S&P Global • Tony Campos, Head of Sustainable Investment, Americas, FTSE Russell • Eila Kreivi, Director, Head Capital Markets Department, European Investment Bank Moderator: Alicia Seiger, Managing Director, Steyer-Taylor Center for Energy Policy and Finance, Stanford University
14.40 – 15.50	Covid-19 and the re-focus on poor health and safety work conditions <ul style="list-style-type: none"> - Coronavirus has forced investors to look at US supply chains in areas such as food processing and consumer goods; to what end? - What are investors in the US doing to influence greater supply chain transparency at home and abroad? - Labour/human rights as a social and investment risk. Is the subject of global supply chains now a serious potential value-destroyer for brands; and does it show up in share prices? Speakers: <ul style="list-style-type: none"> • Sarah Godlewski, State Treasurer, Wisconsin • Leslie Swyngghedauw, Vice President, ESG Research, MSCI 	New approaches to ramp up investment in sustainable infrastructure <ul style="list-style-type: none"> - When's the US infra upgrade coming? Financing sustainable infrastructure. Has Covid-19 changed the game? - Are present sustainable infrastructure initiatives addressing the financing bottlenecks, and if not, why? - Who should be the long-term owners of infrastructure and on what terms? Speakers: <ul style="list-style-type: none"> • Bella Tonkonogy, Associate Director, Climate Policy Initiative • Steven Williams, Lead Portfolio Manager, Global Green Bonds, Nikko Asset Management • Rob Day, Co-Founder and General Partner, Spring Lane Capital Moderator:

	<ul style="list-style-type: none"> Sharmeen Contractor, Senior Advisor, Market Systems and Investors, Oxfam America Keeran Gwilliam-Beeharee, Executive Director – Market Access, V.E, an affiliate of Moody's <p>Moderator: Paloma Muñoz Quick, Advisor, UN Human Rights and the UN Working Group on Business and Human Rights</p>	Rajiv Sharma, Research Director, Institutional Investment Research Program, Global Projects Center, Stanford University
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DAY 2 - Thursday, December 3rd

09.00 – 10.00	<p>Plenary 3: Black Lives Matter and diversity/equal rights: do companies and investors really care? Or will the courts make them?</p> <ul style="list-style-type: none"> What actions have investors taken to prove that racial equality, diversity and inclusion, and workplace equity truly matter? Investment risks and the rise of derivative lawsuits. How are companies responding, and highlighting their position? What needs to be done to ensure this isn't a PR/marketing stunt but rather an effective movement for fundamental change? What are the measures of success? <p>Speakers:</p> <ul style="list-style-type: none"> Henry Jones, President, California Public Employees' Retirement System (CalPERS) Board of Administration Angela Miller-May, Chief Investment Officer, Chicago Teachers' Pension Fund Michael Garland, Assistant Comptroller for Corporate Governance and Responsible Investment, Office of the New York City Comptroller <p>Moderator: Joyce Cacho, Supervisory Board Member, World Benchmarking Alliance (WBA)</p>
10.10 – 10.35	<p>Keynote Interview 2: How effective is environmental-financial campaigning on divesting and changing investors beliefs and portfolios; is it leading to climate results? What's next?</p> <p>Bill McKibben, Co-Founder, 350.org Interviewed by Hugh Wheelan, Co-Founder and Joint Managing Director, Responsible Investor</p>
10.45 – 12.00	<p>Plenary 4: Net Zero in the US: a tailpipe dream?</p> <ul style="list-style-type: none"> State of play: is the US going to step up? Will the net-zero mission remain on a city and state level? What would net-zero actually mean for US investments? 5 years on from TCFD announcement at COP21 - how far have we come? Update on the Partnership for Carbon Accounting Financials (PCAF)'s Global Carbon Accounting Standard consultation, and what it means for financial institutions? <p>Speakers:</p> <ul style="list-style-type: none"> Trish Halper, Deputy Chief Investment Officer, Wespath Kelly Levin, Senior Associate; Director Of Tracking And Strengthening Climate Action, World Resources Institute Dave Jones, Director, Climate Risk Initiative, UC Berkeley School of Law's Center for Law, Energy & the Environment Gerrit Ledderhof, Responsible Investment Manager, Aegon Asset Management James Leaton, Vice President -ESG - Climate Risk, Moody's Investors Service <p>Moderator:</p>

	Kristian Nammack, Founder, Hansa Impact	
12.00 – 13.00	Lunch	
13.00 – 13.20	Keynote Interview 3: In a time of economic and social fragility, what is the role of the contemporary corporate board for company and societal success, and how could it evolve? Dambisa Moyo, Economist, Author, and Board Member, Chevron and 3M Interviewed by Chido Hession, Events Leader, Responsible Investor	
	Deep Dives	Deep Dives
13.30 – 14.30	In the home of 'tech', how are ESG/tech providers developing the potential for real time and longer-term ESG Data and risk/return analysis? <ul style="list-style-type: none"> - How can broader, faster ESG data and supercomputing be allied: what's possible, and where are the risk/value signals? - Is ESG data up to scratch for today's financial markets decisions? Can it be married cleanly to financial data for investment signals; and if not, what's missing? - Do no evil: what role could Silicon Valley play in evolving ESG-related technology and information? - How can big ESG data help investors better model future scenarios for climate change across sectors in key, at-risk assets and markets? Speakers: <ul style="list-style-type: none"> ● Travis Antoniono, Associate Portfolio Manager, Sustainable Investment & Stewardship Strategies, California State Teachers' Retirement System ● Shila Wattamwar, Executive Director, Client Relations, Sustainalytics ● Vanessa Barnett, Senior Vice President, Global Head of Environmental, Social, and Governance, FactSet Moderator: William Burckart, President & COO, The Investment Integration Project	The Just Transition for American workers and their towns and cities <ul style="list-style-type: none"> - Can investors finance a more equitable, climate secure future for towns and cities? - How can finance really promote better social equality? - What products are facilitating investment in a post-coronavirus urban renaissance? - What new metrics and measurement tools are required to ensure investments in cities really do have a positive impact? Speakers: <ul style="list-style-type: none"> ● Joan Larrea, Chief Executive Officer, Convergence ● Grant Ervin, Chief Resilience Officer, City of Pittsburgh ● Chris Wheat, Director of Strategy and City Engagement, American Cities Climate Challenge, Natural Resources Defense Council Moderator: Emily Kreps, Global Director, Capital Markets, CDP
14.50 – 16.00	Improving the recognition and mitigation of climate risk <ul style="list-style-type: none"> - Modelling climate risk in the US: how serious? - Where are present risk assessment tools lacking? 	Investing in the future of energy <ul style="list-style-type: none"> - How could action on clean energy targets across America through the 2020s change the fundamentals for the energy sector? - Forecasting broad renewables roll-out to the grid and tech improvements in storage/batteries.

	<ul style="list-style-type: none"> - Is there a strong argument for more regulation e.g. for companies to be mandated to report on physical climate risk? - What is good reporting and assessment for companies going to look like? <p>Speakers:</p> <ul style="list-style-type: none"> • Bob Litterman, Founding Partner, Kepos Capital • Ian Simm, Founder and Chief Executive Officer, Impax Asset Management • Joseph Lake, Chief Operating Officer, The Climate Service • Joshua Kendall, Head of Responsible Investment Research and Stewardship, Insight Investment • Emilie Mazzacurati, Global Head of Moody's Climate Solutions, Moody's Corporation <p>Moderator: Hugh Wheelan, Co-Founder and Joint Managing Director, Responsible Investor</p>	<ul style="list-style-type: none"> - Where is North American shale/natural gas headed? - How are the world's largest energy companies assessing the future of the global energy system? <p>Speakers:</p> <ul style="list-style-type: none"> • Dimitry Dayen, Director, Senior Research Analyst for Energy, ClearBridge Investments • Danielle Fugere, President, As You Sow • Dan Bakal, Senior Director, Electric Power, Ceres <p>Moderator: Daniel Brooksbank, Head of Strategic Content, Responsible Investor</p>
16.00	END OF CONFERENCE	