







RI USA 2021







December 7-9, 2021
All times displayed in ET

Day 1 - Tuesday, 7th December 2021

09.30 - 10.00	<p>Keynote discussion: Reflections on what COP26 will mean for asset owners and investors on getting to net zero, with a particular view on the US</p> <p>Nili Gilbert, Chair, Advisory Panel, Glasgow Financial Alliance for Net Zero, and Vice Chairwoman, Carbon Direct, interviewed by Hugh Wheelan, Co-Founder & Joint Managing Director, Responsible Investor</p>
10.15 - 11.15	<p>Plenary 1: The role of the US in setting global ESG standards, and the double materiality debate</p> <ul style="list-style-type: none"> Where do US policymakers, regulators and investors stand on ESG regulation and the double materiality debate? Can US investment houses remain competitive if standards differ from other jurisdictions? Is there a disconnect between the US' role in promoting ESG on the global stage and the reality of everyday domestic investment practice? <p>Speakers:</p> <p>Bob Litterman, Founding Partner and Chairman of the Risk Committee, Kepos Capital Bertrand de Mazières, Director General for Finance, European Investment Bank Mona Naqvi, Global Head of ESG Capital Markets, S&P Global Jim Hawley, Senior ESG Advisor, Truvalue Labs, A FactSet Company Moderator: Hugh Wheelan, Co-Founder and Joint MD, Responsible Investor</p> <div>    </div>
11.30 - 12.15	<p>Deep Dive 1: Challenges and opportunities in the maturing North American green/blue bond market</p> <ul style="list-style-type: none"> Is the green bond market under threat from dwindling 'greeniums'? How are investors using data to verify the sustainability credentials of debt finance? Where's the sustainable debt issuance going to be, and how should investors be thinking about their bond portfolios around big ticket climate themes like energy and transport? <p>Speakers:</p> <p>Caroline Harrison, Senior Research Analyst, Climate Bonds Initiative Thomas Archer, Product Specialist - Global Fixed Income, Nikko Asset Management Laetitia Hamon, Head of Sustainable Finance, Luxembourg Stock Exchange Moderator: Dominic Webb, Reporter, Responsible Investor</p> <div>   </div>
12.30 - 13.00	<p>Investor Spotlight 1: Equity portfolios</p> <ul style="list-style-type: none"> How to dynamically build a portfolio of stocks for a pragmatic net zero CO2 strategy



	<ul style="list-style-type: none"> • <i>How to really integrate ESG factors for performance and sustainability trends</i> <p>Speakers:</p> <p>Alan Hsu, Global Industry Analyst and Portfolio Manager, Wellington Management Derek Deutsch, Managing Director, Portfolio Manager, ClearBridge Investments Moderator: Hugh Wheelan, Co-Founder and Joint MD, Responsible Investor</p> <div>   </div>
14.30 - 15.30	<p>Plenary 2: What does 2021's record proxy year mean for shareholder rights and engagement, and what to expect in 2022?</p> <ul style="list-style-type: none"> • <i>After Exxon, are successful proxy battles now the new 'norm'; and what does that mean?</i> • <i>Can we expect increasingly progressive resolutions as the SEC enlarges its criteria?</i> • <i>Is the push to act on political lobbying in proxy season here to stay?</i> • <i>How smaller shareholders are continuing to engage despite recent SEC regulation</i> <p>Speakers:</p> <p>Aeisha Mastagni, Portfolio Manager, CalSTRS Vikram Gandhi, Senior Lecturer, Harvard Business School Rob Du Boff, ESG Research Analyst, Bloomberg Intelligence Moderator: Paul Verney, Senior Reporter, Responsible Investor</p> 

Day 2 - Wednesday, 8th December 2021	
10.00 - 11.00	<p>Plenary 3: Diversity and Inclusion: how US investors can create fundamental change</p> <ul style="list-style-type: none"> • <i>The myth of the data gap in addressing racial equality and workplace equity</i> • <i>Discussing the materiality of diversity and inclusion after a record proxy season</i> • <i>How investors and regulators are addressing diversity within financial organisations in the US, and how those groups are responding</i> <p>Speakers:</p> <p>Michael Garland, Assistant Comptroller for Corporate Governance and Responsible Investment, New York City Office of the Comptroller Hernando Cortina, Head of Index Strategy, ISS ESG Marlene Timberlake D'Adamo, Chief Diversity Equity and Inclusion Officer, CalPERS Moderator: Patience Marime-Ball, Founder and CEO, Women of the World Endowment</p> 
11.15 - 12.00	<p>Deep Dive 2: How are companies and investors responding to regulatory guidance on climate risk and scenario analysis?</p> <ul style="list-style-type: none"> • <i>The evolution of mandatory climate-related financial disclosure in the US</i> • <i>What comes next, and how are investors planning to accelerate scenario analysis with better data?</i> • <i>TCFD reporting: soon to become mandatory in the US?</i> <p>Speakers:</p> <p>Elizabeth Small, General Counsel, CDP North America</p>

	<p>Lisa Eichler, Co-Head Climate & ESG Solutions, Ortec Finance Katherine Taylor, Senior Climate Risk Analyst, The Climate Service Moderator: David Carlin, TCFD and Climate Risk Program Lead, UNEP FI</p> <div>   </div>
12.15 - 12.45	
14.00 - 14.50	<p>Deep Dive 3: We've heard the pledges...now how do we actually decarbonise the US economy to net zero?</p> <ul style="list-style-type: none"> • <i>Net zero initiatives and alliances: do the pledging organisations really know how to do the work?</i> • <i>What actions are needed to shift the fossil fuel-reliant economy to Net Zero?</i> • <i>Why US investors should use the primary market to contribute to Net Zero</i> <p>Speakers:</p> <p>Anne Simpson, Managing Investment Director, Board Governance & Sustainability, CalPERS Tony Campos, Head of Sustainable Investment, Americas, FTSE Russell Bruce Kahn, Climate Solutions Specialist, MSCI Mindy Lubber, Chief Executive Officer and President, Ceres Moderator: Khalid Azizuddin, Reporter, Responsible Investor</p> <div>   </div>
14.55 - 15.25	<p>Investor Spotlight 2: Sustainable fixed income in action</p> <p><i>From corporates to governments - assessing bonds from a combined financial/sustainability perspective and building valid portfolios.</i></p> <p>Speakers:</p> <p>Henrietta Pacquement, Head of Investment Grade at Credit Europe, Allspring Global Investments Anthony Belcher, Head of Sustainable Finance, ICE Data Services, ICE Moderator: Hugh Wheelan, Co-Founder and Joint MD, Responsible Investor</p> <div>   </div>

Day 3 - Thursday, 9th December 2021

10.00 - 11.00	<p>Plenary 4: Regulator and Investor lead initiatives to fight greenwashing in the US</p> <ul style="list-style-type: none"> • <i>What can investors expect from the SEC's Task Force to fight misleading ESG statements?</i> • <i>What do the SEC's incoming ESG disclosure rules for fund managers actually mean?</i> • <i>Walking the talk: what does a credible ESG strategy look like and how does it work operationally for asset managers?</i> <p>Speakers:</p>
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	<p>Sora Lee, Financial Services Counsel, Bloomberg LP Andrew Collins, Director of ESG & Responsible Investing, San Francisco Employees' Retirement System (SFERS) Desiree Fixler, former Group Sustainability Officer at DWS Group Moderator: Jakob Thomae, Executive Director, 2° Investing Initiative Deutschland</p>
11.15 - 12.00	<p>Deep Dive 4: Investing in sustainable real estate and infrastructure under Biden's \$1.2 trillion plan</p> <ul style="list-style-type: none"> • <i>Weather-related events in Miami and California have shown climate risk to be a tangibly material issue for infrastructure and real estate. How can investors address physical risk, insurance, energy costs and asset depreciation?</i> • <i>Is the new US infrastructure plan really bringing new opportunities to investors? The case for US investors to invest in local infrastructure projects to drive impact and returns</i> • <i>Future proofing property by engaging with building occupants</i> <p>Speakers:</p> <p>Fulya Kocak, Senior Vice President of ESG Issues, Nareit Kim Leinwand Erle, Managing Director, Strategy, Impact & Investor Relations, NY Green Bank Moderator: Elza Holmstedt Pell, Deputy Editor, Responsible Investor</p>
12.15 - 13.00	<p>Deep Dive 5: How should investors and companies navigate through the landscape of a polarized America?</p> <ul style="list-style-type: none"> • <i>Are state level rules likely to put some sustainable investors in danger of falling foul of national regulation (e.g. climate policy)?</i> • <i>How can companies handle discrepancies between their competing interests (state vs national/international stakeholders) - and what does it mean for responsible investors?</i> • <i>What are the hot button topics investors should be keeping an eye on here, and why?</i> <p>Speakers:</p> <p>Heidi Welsh, Executive Director, Sustainable Investments Institute (Si2) Douglas Chia, President, Soundboard Governance Jon Lukomnik, Managing Partner, Sinclair Capital, and Senior Fellow, High Meadows Institute Moderator: Hugh Wheelan, Co-founder and Joint Managing Director, Responsible Investor</p>
14.00 - 14.45	<p>Deep Dive 6: ESG Data in a year of proliferating disclosure requirements</p> <ul style="list-style-type: none"> • <i>Is ESG data good enough for investors to comply with increasing reporting requirements in the US? If not, what's missing?</i> • <i>How can big ESG data help investors better model future scenarios for climate change across sectors and assets?</i> • <i>The race for reliable data to address the "S" of ESG</i> <p>Speakers:</p> <p>Jimmy Greer, VP – ESG Outreach and Research, Moody's ESG Solutions Patricia Pina, Head of Product Research & Innovation, Clarity AI Moderator: Layalee Ramahi, North America Network Coordinator, UNEP FI</p> <p>  CLARITY AI  </p>