

Building momentum for a Just Transition in Canada

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David Andrews, Senior Legal Counsel, Investments, **HOOPP**
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Amy Hepburn, CEO, **Investor Leadership Network (ILN)**
Samantha Hill, Managing Director, Sustainable Investing, **CPP Investments**
Alison Joutsi, Principal, **ESG Global Advisors**
Michael Kelly, Chief Legal & Sustainability Officer, **OMERS**
Jonathan Laski, Director, Sustainable Finance, **PWC**
Jennifer Livingstone, Vice President, Climate Strategy, **RBC**
Susan McGeachie, Co-Founder & Managing Partner / Adjunct Professor (Climate Finance),
Global Climate Finance Accelerator
Bertrand Millot, Head of Sustainability, **CDPQ**

Please note, this is a draft document, session timings and descriptions are subject to occasional change.

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Katharine Preston, Vice President, Sustainable Investing, **OMERS**

Matt Price, Executive Director, **Investors for Paris Compliance**

Colin Saravanamuttoo, Executive Director and Canada Country Director, **World Animal Protection Canada**

Alison Schneider, Canadian Representative, **CERES**

Katherine Short, Associate Director, Sustainable Investing, **OMERS**

Alex Side, Senior Principal, **IMCO Infrastructure**

Bruce Simpson, GP, **Agetech Capital**

Polina Sims, Managing Director, Head of Investment Strategy, Sustainability, and Asset Management, **IMCO**

Charles-Antoine St Jean, Chair, CSSB, **FRAS Canada**

Laurence Vigneau, Senior Advisor, Stewardship Investing, **CDPQ**

Joy Williams, Executive Director, **GFANZ**

Barbara Zvan, President and CEO, **University Pension Plan Ontario (UPP)**

Day one

Wednesday 11 September

8:00 Registration and refreshments

8:55 Opening remarks

Gina Gambetta, Senior Reporter, **Responsible Investor**

9:00 Plenary 1: Green horizons: Navigating transition finance in Canada

- Defining transition finance and its essential role in Canada's economy
- How can transition finance be deployed credibly?
- How do Canada's strategies and investments in the energy transition compare with those of the USA and Europe?
- Is transition finance compatible with net zero commitments?

Moderator: **Bruce B. Simpson**, GP, **Agetech Capital**

Barbara Zvan, President and CEO, **University Pension Plan Ontario (UPP)**

Jennifer Livingstone, Vice President, Climate Strategy, **RBC**

9:50 Keynote: Preparing for standardized sustainability disclosure requirements in Canada

The Canadian Sustainability Standards Board (CSSB) released the first draft Canadian Sustainability Disclosure Standards (CSDSs) for public comment earlier this year, with the goal of bringing the global baseline established by the International Sustainability Standards Board to Canada. Since the public consultation closed in June, the Board has assessed and deliberated the feedback they heard from Canadians. Join CSSB Chair Charles-Antoine St-Jean for a discussion on feedback the CSSB received, what the CSSB has been talking about since the public consultation closed, and what investors should be prepared for when the final standards are released.

Charles-Antoine St Jean, Chair, CSSB, **FRAS Canada**

Moderator: **Gina Gambetta**, Senior Reporter, **Responsible Investor**

10:05 Plenary 2: The future of ESG regulation and Canada's standards development

- Canada's taxonomy progress
- CSSB: What are the next steps?
- How are international ESG standards, such as the CSRD and the SEC's proposed climate disclosure rules, influencing Canadian ESG reporting and regulation?

- How can Canadian regulators balance the need for robust ESG standards whilst maintaining global competitiveness?
- How does the Canadian regulatory landscape currently accommodate the concept of double materiality in sustainability reporting?

David Andrews, Senior Legal Counsel, Investments, **HOOPP**

Scott Morrison, Partner, Sustainability Reporting & Assurance, **PWC**

10:50 Networking break

11:20 Fireside chat: The evolution of the CSO

Moderator: **Gina Gambetta**, Senior Reporter, **Responsible Investor**

Bertrand Millot, Head of Sustainability, **CDPQ**

Michael Kelly, Chief Legal & Sustainability Officer, **OMERS**

11:50 Plenary 3: Public-private partnerships: Driving the next phase of energy transition

- How can collaboration between the public and private sectors be improved to facilitate investments in sustainable infrastructure and clean technologies?
- How can P3s incorporate Indigenous communities and social responsibility into their project planning and execution?
- What strategies are needed within P3 frameworks to ensure the resilience and adaptation of the real economy?
- What policy measures can be implemented to incentivize greater private sector engagement and investment in the energy transition?

Moderator: **Susan McGeachie**, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**

Amy Hepburn, CEO, **Investor Leadership Network (ILN)**

12:35 Plenary 4: Climate-biodiversity nexus: Closing the gap with sustainable investment

- How is the TNFD framework being integrated in Canada? What can investors learn from early adopters?
- How to leverage data for a nature positive investment?
- How does nature and biodiversity support net-zero? What are the challenges and opportunities within the context of transition finance?

Joy Williams, Executive Director, **GFANZ**

13:20 Lunch

Stream A	Stream B
<p>14:10 – A1: Decarbonization and credit markets</p> <ul style="list-style-type: none"> • How can investors ensure investments contribute to Canada’s decarbonization goals? • How can credit markets be leveraged more effectively to finance decarbonization? • What are the biggest challenges and opportunities in scaling up green financing in Canada? How do these compare globally? • Canada’s provincial carbon markets - how can we ensure their integrity and effectiveness? • What role do private credit markets play in ESG investing and sustainable finance? 	<p>14:10 – B1: Social responsibility: Risks, challenges, and opportunities</p> <ul style="list-style-type: none"> • What are the social risks that investors should be thinking about? • How can investors help alleviate social issues such as DEI, housing crisis, and aging demographics? • How are investors measuring and reporting on the social impact of their investments? • How can sustainable investments positively contribute to social goals? • What are the main challenges of integrating social responsibility into investment decisions? <p>Andrea Nemtin, Chief Executive Officer, SI Canada</p> <p>Lila Han, Director, Sustainable Investing, OMERS</p>
<p>14:55 Short turnaround break</p>	
<p>15:00 – A2: Responsible AI</p> <ul style="list-style-type: none"> • Defining responsible AI and its impact and opportunities on the portfolio • Implementing AI through a responsible governance structure • How can companies guarantee transparency, fairness, and accountability in their AI systems? • Social implications of AI • How can AI strategies fit into companies overall ESG framework and long-term sustainability goals? 	<p>15:00– B2: Investing in nature: Opportunities in biodiversity</p> <ul style="list-style-type: none"> • What innovative financial instruments and models have shown promise in funding biodiversity conservation efforts? How can these models be scaled or adapted for different contexts? • What are the primary risks and challenges investors face when integrating biodiversity considerations into their portfolios, and how can these be mitigated?

	<ul style="list-style-type: none"> • What are the emerging trends in nature finance, and how should investors position themselves to take advantage of these? • How can investors adopt a nature-positive strategy in the portfolio?
<p>15:45 Short turnaround break</p>	
<p>15:50 – A3: ESG Data: Enhancing the investment strategy</p> <ul style="list-style-type: none"> • How is ESG data incorporated into responsible investment decisions? • Quantity vs quality: what steps are being used to improve data verification and assurance processes? • How are investors needs changing on ESG data? • Global ESG reporting and disclosure and what this means for Canadian data users and providers • Preparing for emerging data challenges: What are the challenges and lessons learned? 	<p>15:50 – B3: Proxy voting: Making your votes count</p> <ul style="list-style-type: none"> • Vote pre-disclosure: What are the challenges with gaining traction behind certain votes? • What elements make a shareholder proposal more likely to be supported by a majority of investors? • Shareholder proposal fatigue • Workers’ rights proposals and their impact • Key takeaways from 2024 proxy season <p>Moderator: Thomas Estinès, Co-CEO, GIR</p> <p>Sarah Couturier-Tanoh, Director of Shareholder Advocacy, SHARE</p>

16:35 Networking drinks

18:00 End of day one

Day two

Thursday 12 September

8:00 Registration and refreshments

8:30 Interactive roundtable discussions

1. Investment opportunities in industrial decarbonization - **Susan McGeachie**, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**
2. Deforestation
3. Scope 3
4. Carbon markets
5. Water
6. Methane
7. Climate adaptation
8. Climate scenario analysis
9. ESG fixed income
10. Critical minerals

Stream A	Stream B
<p>9:40 – A4: What makes a credible transition plan?</p> <ul style="list-style-type: none"> • Transition funds: What are the challenges and opportunities in financing transition plans? • Assessing transition plans and tracking progress • The role of carbon pricing and offsets in transition plans • Integrating nature into net-zero transition plans • How can cross-sector collaboration enhance the effectiveness of transition plans? • What makes a credible plan in the current politicized environment? 	<p>9:40 – B4: Sustainable agriculture and food systems</p> <ul style="list-style-type: none"> • Exploring the investment potential and impact strategies • In what ways can agricultural practices contribute to the energy transition beyond just adopting renewable energy sources? • Emissions Disclosure - How can we further reduce emissions in food supply chains? • Addressing the material risks of intensive animal agriculture en route to net-zero <p>Colin Saravanamuttoo, Executive Director and Canada Country Director, World Animal Protection Canada</p>

<p>Moderator: Katherine Short, Associate Director, Sustainable Investing, OMERS</p> <p>Youssef Aroub, Senior Principal, Sustainable Investing, IMCO</p> <p>Jonathan Laski, Director, Sustainable Finance, PWC</p>	
<p>10:25 Networking break</p>	
<p>10:45 – A5: Navigating climate risk and materiality in Canada</p> <ul style="list-style-type: none"> • What are the best strategies to assess and manage climate risks in the portfolio? • How should investors approach asset valuation and risk assessment differently to protect their investments? • Physical risk vs transition risk <p>Alison Schneider, Canadian Representative, CERES</p>	<p>10:45 – B5: Benefits of Indigenous investments</p> <ul style="list-style-type: none"> • Understanding landscape of opportunities • What are the associated risks? And how can we mitigate these? • Engaging with First Nations companies – How can investors build a better relationship? • Indigenous Investments = social impact <p>Karen Bird, Chief Capital Officer, Indigenous Impact Investment Circle</p>
<p>11:30 Short turnaround break</p>	
<p>11:35 – A6: ESG bonds: Diversifying beyond green</p> <ul style="list-style-type: none"> • Green Bond Framework - Are green bonds supporting the transition? How can Canada optimize the use of green bonds and loans to fund its transition to a sustainable economy? • What are the potential risks and rewards associated with investing in nuclear bonds? • How is the Canadian market addressing the risk of 'greenwashing'? 	<p>11:35 – B6: Human rights and the supply chain</p> <ul style="list-style-type: none"> • Managing supply chain risk: the challenges for investors • Bill S-211: what are the biggest challenges in achieving compliance? • How can companies go beyond mere compliance to actively promote human rights? • What role does data play in managing human rights risks in supply chains, and how can investors and

<p>in bond issuances, and what mechanisms are in place to ensure authenticity?</p> <ul style="list-style-type: none"> • Social bonds and a just transition: How are Indigenous communities and projects being integrated into the sustainable bond market in Canada? 	<p>companies improve their data collection and analysis practices?</p> <p>Laurence Vigneau, Senior Advisor, Stewardship Investing, CDPQ</p>
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12:20 Lunch

13:00 Keynote

13:20 Plenary 5: Effective engagement strategies for sustainable investing in Canada

- Active ownership vs passive ownership
- How do you achieve impact in engagement and measure success?
- Brown stripping vs engagement: How are Canadian investors engaging with the oil and gas sector?
- How has the landscape of Canadian engagement evolved in recent years?

Polina Sims, Managing Director, Head of Investment Strategy, Sustainability, and Asset Management, **IMCO**

Matt Price, Executive Director, **Investors for Paris Compliance**

14:10 Plenary 6: Investing in zero: Finances and strategies of climate change

- Scale of investment necessary to reach 1.5C: What are the challenges and opportunities for investors?
- How are asset owners approaching provincial decarbonization efforts in their portfolios?
- What is keeping investment senior leadership up at night in 2024?
- How are asset owners and asset managers coping with growing geopolitical uncertainties? What challenges are they facing?

Alex Side, Senior Principal, **IMCO Infrastructure**

Katharine Preston, Vice President, Sustainable Investing, **OMERS**

Samantha Hill, Managing Director, Sustainable Investing, **CPP Investments**

15:00 End of conference