

Building momentum for a Just Transition in Canada

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

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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**

Stephanie Chow-Ashton, Managing Director, Transition Finance, **GFANZ**

Julie Segal, Senior Program Manager Climate Finance, **Environmental Defence**

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 interim chair Bruce Marchand 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.

Bruce Marchand, Interim Chair, **Canadian Sustainability Standards Board (CSSB)**

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

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

- 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?

Moderator: **Catherine McCall**, CEO, **Canadian Coalition for Good Governance**

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

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

Jo-Anne Matear, Head of Sustainable Finance, **Ontario Securities Commission**

Alyson Slater, Head of Sustainable Investment Canada, Public Markets, **Manulife Investment Management**

10:55 Networking break

11:25 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**

Alanna Boyd, Chief Sustainability Officer, **Sun Life**

11:55 Plenary 3: 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?

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

Joy Williams, Executive Director, **GFANZ**

James Snider, VP, Science, Knowledge and Innovation, **WWF Canada**

Lovey Sidhu, Sustainable Investment Specialist, **Mercer**

12:40 Plenary 4: Driving the next phase of the energy transition

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

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

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

Sandra Odendahl, Senior Vice President & Head of Sustainability, Diversity & Social Impact, **BDC**

Maryam Golnaraghi, Director, Climate Change & Environment, **The Geneva Association**

Lindsey Walton, Director of Americas, **PRI**

Kimberly Randle, CEO and Founder, **FairSupply**

13:30 Lunch

Stream A	Stream B
<p>14:20 – 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? • What role do private credit markets play in ESG investing and sustainable finance? 	<p>14:20 – 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>Moderator: Siddharth Samarth, Managing Director & Head, Sustainable Finance, CIBC Capital Markets</p> <p>Paula Luff, Director of Sustainability Research and Engagement, DSC Meridian Capital</p> <p>Olaf Weber, Professor, CIBC Chair in Sustainable Finance, Schulich School of Business</p> <p>Daniel Simunac, Co-CEO, Stonebridge Financial</p>	<p>Moderator: Bob Dannhauser, Senior Advisor, Shift</p> <p>Andrea Nemtin, Chief Executive Officer, SI Canada</p> <p>Lila Han, Director, Sustainable Investing, OMERS</p> <p>Ryan Clancy, Head of Impact Management, Rally Assets</p> <p>Manon Salomez, ESG Analyst, Mirova</p>
<p>15:05 Networking break</p>	
<p>15:20 – A2: Greenwashing vs greenhushing: Assessing the impact of Bill C-59</p> <ul style="list-style-type: none"> • How does Bill C-59 fit into Canada’s anti-greenwashing regulatory landscape? • What are the implications of the bill for Canadian corporates and investors? • Is there a risk that Canadian corporates will embrace greenhushing? • Are Canadian policymakers doing enough to combat greenwashing in the financial sector? <p>Moderator: Alison Joutsu, Principal, ESG Global Advisors</p> <p>Tyson Dyck, Partner, Torys LLP</p> <p>Emily Partington, Managing Director, Quinn+Partners</p> <p>Meghan Harris-Ngae, Partner, PwC Canada</p>	<p>15:20– 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? • 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>Moderator: Gina Gambetta, Senior Reporter, Responsible Investor</p> <p>Maya Saryyeva, Interim Executive Director, ISF</p>

	<p>Paige Olmsted, Conservation Finance Specialist, Nature Investment Hub</p> <p>Geneviève Grenon, Responsible Investment Senior Advisor, Biodiversity Expert, Desjardins Global Asset Management</p> <p>Jeff Briggs, Managing Director, North America, New Forests</p>
<p>16:05 Short turnaround break</p>	
<p>16:15 – A3: ESG Data: Enhancing the investment strategy</p> <ul style="list-style-type: none"> • How is ESG data incorporated into responsible investment decisions? How does this differ in private vs public markets? • Quantity vs quality: what steps are being used to improve data verification and assurance processes? • How has ESG data in private markets evolved with the emergence of the ESG Data Convergence Initiative? • How are investors needs changing on ESG data? • Global ESG reporting and disclosure and what this means for data users and providers <p>Moderator: Audrie Chad, Director of Research, Global Risk Institute</p> <p>Will Relle, Director, ESG, Harbourvest</p> <p>Olaf Weber, Professor, CIBC Chair in Sustainable Finance, Schulich School of Business</p> <p>Mandira Reddy, Director, Capricorn Investment Group</p>	<p>16:15 – 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> <p>Valérie Cecchini, Managing Partner, BOREALIS Global Asset Management</p> <p>Ajit Singh, Senior Associate - ESG & Proxy Voting, BMO Global Asset Management</p>

17:00 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. Mitigating risk through methane management

Sean Hackett, Senior Manager, Energy Transition, **EDF**

3. Transition Today: Climate-related decisions in asset allocation and investment

Wanfeng Zhou, Sr Sustainable Investment Consultant, **Mercer**

4. The cow in the room: addressing industrial animal agriculture is a necessity for climate mitigation

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

5. Neurodiversity as a Competitive Advantage in Sustainable Finance

Audrie Chad, Director of Research, **Global Risk Institute**

6. Proxy fights: Decoding the risks and rewards for investors

Thomas Estinès, Co-CEO, **Groupe Investissement Responsable**

09:30 Short networking break

Stream A	Stream B
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<p>09:40 – 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>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>Dana Krechowicz, Director, Sustainable Finance, Global Risk Institute</p> <p>Andreas Ross, Head of New Product Research and Development, ZAIS Group</p>	<p>09:40 – 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>Moderator: Gina Gambetta, Senior Reporter, Responsible Investor</p> <p>Colin Saravanamuttoo, Executive Director and Canada Country Director, World Animal Protection Canada</p> <p>Alison Blay-Palmer, Professor in Geography and Environmental Studies, Wilfrid Laurier University</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? 	<p>10:45 – B5: Benefits of Indigenous investments</p> <ul style="list-style-type: none"> • Understanding landscape of opportunities

<ul style="list-style-type: none"> • How should investors approach asset valuation and risk assessment differently to protect their investments? • Physical risk vs transition risk <p>Moderator: Bruce Simpson, GP, Agetech Capital</p> <p>Alison Schneider, Canadian Representative, CERES and Principal Encompass ESG Corp.</p> <p>Ryan Ness, Director, Adaptation, Canadian Institute for Climate Choices</p> <p>George Fan, VP, National Nat Cat & Climate Risk Lead, Marsh Advisory, Marsh Canada</p>	<ul style="list-style-type: none"> • 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>Moderated by Karen Restoule, Vice President, Crestview Strategy</p> <p>Karen Bird, Chief Capital Officer, Indigenous Impact Investment Circle</p> <p>Fred Di Blasio, CEO and Managing Partner, Longhouse Capital Partners</p> <p>Jody Anderson, Strategy & Partnerships Advisor, First Nation Finance Authority</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 sustainable bonds that invest in nuclear power? • How is the Canadian market addressing the risk of 'greenwashing' in bond issuances, and what mechanisms are in place to ensure authenticity? • Social bonds and a just transition: How are Indigenous communities 	<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 companies improve their data collection and analysis practices? <p>Moderator: Bob Dannhauser, Senior Advisor, Shift</p>

<p>and projects being integrated into the sustainable bond market in Canada?</p> <p>Moderator: Susan McGeachie, Co-Founder & Managing Partner, Global Climate Finance Accelerator</p> <p>Melissa Menzies, Director, Sustainable Finance, Scotiabank</p> <p>Magali Gable, Sustainable Finance, BMO Financial Group</p> <p>Ian Howard, Director of Climate Services, Climate Bonds Initiative</p> <p>Guillaume Bellavance, Assistant Portfolio Manager, Fixed Income, Fiera Capital</p>	<p>Juana Lee, Associate Director, Corporate Engagement, SHARE</p> <p>Michelle Albanese, Director, ESG and Responsible Supply Chain, Upswing Solutions</p> <p>Kimberly Randle, CEO and Founder, FairSupply</p>
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12:20 Lunch

13:05 Keynote: Globally comparable sustainability information

The ISSB standards are designed to provide a global baseline that covers the information that is material to investors globally. With IOSCO's endorsement and more than 20 jurisdictions progressing towards the adoption or other use of ISSB Standards, more than ever, the global investors are at the closest to comparable, consistent and reliable sustainability-related information.

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

Jingdong Hua, ISSB Vice-Chair, **IFRS Foundation**

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?

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

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

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

Pratima Divgi, Head of Capital Markets, North America, **CDP**

Delaney Greig, Director, Investor Stewardship, **University Pension Plan Ontario**

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?

Moderator: **Adam Scott**, Executive Director, **Shift: Action for Pension Wealth and Planet Health**

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

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

Bonnie Foley-Wong, Sustainable Investment Leader, **Mercer**

15:00 End of conference