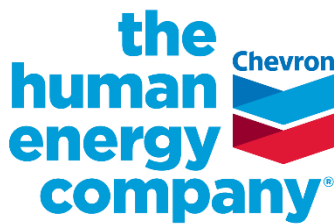


## Thriving in the rapidly evolving US sustainable finance landscape

Lead sponsors



Sponsors



Associate sponsors



**BNP PARIBAS**  
ASSET MANAGEMENT

The sustainable investor for a changing world



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

For program information:  
**Finlay Eglinton**  
[finlay.eglinton@pei.group](mailto:finlay.eglinton@pei.group)

For sponsorship opportunities:  
**William Powell**  
[william.p@pei.group](mailto:william.p@pei.group)

For registration queries:  
**Customer Services**  
[customerservices@pei.group](mailto:customerservices@pei.group)

Day one

**Tuesday 3 December**

**08:55 Opening remarks**

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

**09:00 Plenary 1: Transition finance in the US: Driving change through investment**

- How are US investors approaching high-emitting sectors and corporates?
- Will transition finance be the main source of alpha in the US energy transition?
- Do US investors want dedicated transition finance regulation and/or instruments?
- Is there a tension between financing the transition and meeting net zero targets?

Moderator: **Andrew Howell**, Senior Director, Sustainable Finance, **Environmental Defense Fund (EDF)**

**Curtis D. Ravenel**, Senior Advisor to the Co-Chair & Vice Chair, **GFANZ**

**Candice Coppere**, Head of Climate and Nature Solutions, Product, **ISS STOXX**

**Tara Mei Smith**, ESG Integration Officer, **NYC Office of the Comptroller**

**Andrew Siwo**, Head of Sustainable Investments and Climate Solutions, **New York State Common Retirement Fund**

**Thomas Englerth**, Associate Director, Sustainable Finance, **S&P Global Ratings**

**09:50 Plenary 2: Manager selection in the US**

- How has the politicisation of ESG impacted manager selection?
- Is stewardship being priced into manager selection or neglected in search of lower fees?
- Is manager selection being utilised enough to drive asset owner priorities through managers?
- Are consultants doing enough to drive asset owner priorities through manager selection?
- Given the US context, will climate-focused/net zero investors drift to European-headquartered managers?

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**

**Matthew Illian**, Director, **United Church Funds**

**Rajith Sebastian**, Head of ESG and Sustainable Investing, **New York State Insurance Fund (NYSIF)**

**Sarika Goel**, Global Head Sustainable Investment Research, **Mercer**

10:40 Networking break

**11:10 Keynote - Eye of the storm: former SEC policy director reflects on three years at US regulator**

**Heather Slavkin Corzo**, Principal, **Mindset**

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

**11:30 Plenary 3: ESG regulation: The US, EU and beyond**

- How are US investors navigating the SFDR and what do they want out of the regulatory reform?
- US anti-greenwashing efforts: what's next for SEC climate-related disclosures and name rules?
- Expectations on financial institutions from CSRD and SEC climate rule
- Compliance vs action – how are investors balancing mandatory and voluntary disclosure needs with investment/stewardship activities?

Moderator: **Steven Rothstein**, Managing Director, Accelerator, **Ceres**

**Sandra Silea**, Director, ESG & Stewardship, **AustralianSuper**

**Elizabeth Seeger**, Board Member, ISSB, **IFRS Foundation**

**Sireen Hajj**, Director, Investor Outreach, **US SIF**

**12:15 Plenary 4: Nature investment in North America: Risks and opportunities**

- Nature as a systemic risk: how are investors approaching the challenge?
- Measuring biodiversity and nature risk across portfolios: methodologies, tools and barriers
- Public vs private markets: where are the nature investment opportunities?
- Are US corporates doing enough, and disclosing enough, on nature?

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

**Lauren Compere**, Managing Director, Head of Stewardship & Engagement, **Boston Common Asset Management**

**Felipe Carazo**, Head of Alliance Management, Tropical Forest Alliance, **World Economic Forum**

**Daan Van Acker**, Director, **InfluenceMap**

**Megan Reilly Cayten**, Head of Carbon Nature Fund, **Climate Asset Management**

13:00 Lunch

Stream A	Stream B
13:50 – A1: Corporate transition plans: Next steps	13:50 – B1: The future of collaborative engagement in the US

- What does a credible transition plan look like?
- Are US companies embracing the concept of transition plans?
- What guidance do companies and investors need? Prescriptive vs high-level
- To what extent should climate lobbying activities be disclosed in transition plans?

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**  
**Andreas Ross**, Head of New Product Research and Development, **ZAIS Group**  
**Joel Paque**, Head of Partnerships, US, **Climate Arc**  
**Jacob Hupart**, Co-Chair of ESG Practice, **Mintz**  
**Radhika Mehrotra**, Associate Director Capital Markets, **CDP**

- What exactly are the rules around collaborative engagement in the US?
- All noise and no heat: do legal threats around antitrust carry any weight? If so, where are the lines which shouldn't be crossed?
- How much has the politicization of ESG stunted collective engagement in the US?
- How can investors defend themselves against accusations? What is best practice?

Moderator: **Gina Gambetta**, Senior Reporter, **Responsible Investor**  
**Marcela Pinilla**, Director of Sustainable Investing, **Zevin**  
**Claudia Martinez**, Director of Research, **Access to Medicine Foundation**  
**Bethany Davis Noll**, Executive Director, **The State Energy & Environmental Impact Centre at NYU School of Law**

## 14:30 Short turnaround break

### 14:35 – A2: ESG Data: The next frontier

- Do companies have the data they need for mandatory climate reporting?
- Supporting scope 3 data requirements
- How is technology helping to meet the nature data challenge?
- What are the biggest gaps in supply chain data?

Moderator: **Manju Seal**, Former Head of Sustainable Finance and Capital Markets ESG Lead, **Bank of Montreal**

### 14:35 – B2: Agriculture: Sustainability and food security

- How are US investors thinking about agriculture and sustainability?
- Is supporting food security compatible with financial institutions' net zero commitments?
- How is technology changing the agricultural sustainability landscape?
- Is regenerative agriculture a scalable solution?

Moderator: **Chris Janiec**, Americas Editor, **Agri Investor**  
**Sofia De La Parra**, Investor Outreach Manager, **FAIRR**

<p><b>Samantha McCafferty</b>, Associate Director - Sustainable Investing, <b>Harvard Management Company</b></p> <p><b>Paul Vozzella</b>, Director, Americas, <b>Asset Impact</b></p> <p><b>Greer Howard-Tabah</b>, Vice President, ESG, <b>Oaktree Capital Management</b></p>	<p><b>Lara Fornabaio</b>, Senior Legal Researcher, <b>Colombia Center on Sustainable Investment</b></p> <p><b>Matthew Corbett</b>, Partner – Agriculture, <b>Fiera Comox</b></p> <p><b>Björn Aarts</b>, ESG Director, <b>Rabo Investments</b></p>
<p>15:15 Short turnaround break</p>	
<p><b>15:20 – A3: Water risk: An investors’ guide</b></p> <ul style="list-style-type: none"> <li>• Where are US companies most exposed to water risk?</li> <li>• How should investors engage corporates on water?</li> <li>• What tools and data are available to investors to assess water risk?</li> <li>• How can the private sector help to address water shortages?</li> </ul> <p>Moderator: <b>Chris Janiec</b>, Americas Editor, <b>Agri Investor</b></p> <p><b>Karen Sack</b>, Executive Director, <b>Ocean Risk and Resilience Action Alliance</b></p> <p><b>Saumya Mehrotra</b>, Product Management Team, <b>ISS STOXX</b></p> <p><b>Tom Ferguson</b>, Managing Partner, <b>Burnt Island Ventures</b></p> <p><b>Matthew Diserio</b>, Co-Founder &amp; President, <b>Water Asset Management (WAM)</b></p>	<p><b>15:20 – B3: Bond markets vs private credit: Financing the energy transition</b></p> <ul style="list-style-type: none"> <li>• Are bond markets fit-for-purpose for financing the energy transition?</li> <li>• SLBs and transition bonds: do they have a role in the US?</li> <li>• Where can private credit fill the gaps in debt financing for the transition?</li> <li>• How is the policy landscape impacting sustainability linked bond issuance in the US?</li> </ul> <p>Moderator: <b>Dominic Webb</b>, Senior Reporter, <b>Responsible Investor</b></p> <p><b>Jamison Friedland</b>, Senior Sustainability Analyst, <b>AXA IM</b></p> <p><b>Jamie Franco</b>, MD and Global Head of Sustainable Investment, <b>TCW Group</b></p> <p><b>Peter Munro</b>, Head of Investor Relations &amp; Sustainable Finance, <b>European Investment Bank (EIB)</b></p>

16:00 Networking break

16:10 Workshops

*This session allows participants to learn from both experts and each other, providing interactive small group discussions guided by designated facilitators.*

<p><b>Workshop A - Attracting investor capital to U.S. housing</b></p> <ul style="list-style-type: none"> <li>• What role do securitized products play in supporting U.S. housing?</li> <li>• How can issuers use the capital markets to allocate capital towards affordable housing?</li> <li>• What disclosure considerations are at play?</li> <li>• How do investors use these products to meet their clients' demands?</li> </ul> <p><b>Nick Sapirie</b>, Vice President, Single-Family Capital Markets, <b>Fannie Mae</b></p> <p><b>Jamie Franco</b>, MD and Global Head of Sustainable Investment, <b>TCW Group</b></p> <p><b>Jim Egan</b>, Co-Head of Securitized Products Research, <b>Morgan Stanley</b></p>	<p><b>Workshop B - Nature Investment</b></p> <p><b>Megan Reilly Cayten</b>, Head of Carbon Nature Fund, <b>Climate Asset Management</b></p> <p><b>George Kelly</b>, CEO, <b>Earth Recovery Partners</b> (Hold)</p>	<p><b>Workshop C - Investing in 2050</b></p> <p><i>Investing has changed. Is changing. Will change. And the pace of change is accelerating exponentially.</i></p> <ul style="list-style-type: none"> <li>• How are fundamental assumptions around investing, including methodology, metrics, technology, regulation, and community formation, changing?</li> <li>• How is the pace of change in investing accelerating?</li> <li>• How can we discuss the future of investing through thought-experiments and examine the issues shaping the next 25 years?</li> <li>• What are the implications of technology, new investing theories, demographic shifts, space exploration, and increased longevity for investing?</li> </ul> <p>Co-facilitator: <b>Doug Scott</b>, CEO &amp; Co-founder, <b>Ethic</b></p> <p>Co-facilitator: <b>Georgia Stewart</b>, CEO, <b>Tumelo</b></p> <p>Co-facilitator: <b>Adam Kanzer</b>, Head of Stewardship, Americas, <b>BNP Paribas</b></p>
--	--	--

17:00 Networking drinks

18:00 End of day one

Day two

**Wednesday 4 December**

**8:00 Networking breakfast**

Stream A	Stream B
<p><b>9:00 – A4: Understanding supply chain sustainability risk: An investors’ guide</b></p> <ul style="list-style-type: none"> <li>• How are investors engaging with corporates on supply chain risk?</li> <li>• Where are the biggest gaps in corporate supply chain data?</li> <li>• How is regulation affecting corporate supply chain reporting?</li> <li>• Which supply chain issues are most material for investors?</li> </ul> <p>Moderator: <b>Gina Gambetta</b>, Senior Reporter, <b>Responsible Investor</b></p> <p><b>Patrick O’Connell</b>, Director of Responsible Investing Research, <b>AllianceBernstein</b></p> <p><b>Adam Kanzer</b>, Head of Stewardship, Americas, <b>BNP Paribas</b></p> <p><b>Serena Shi</b>, Vice President, <b>The Lightsmith Group</b></p> <p><b>Gwen Le Berre</b>, Head of Responsible Investment, <b>Parametric Portfolio Associates</b></p>	<p><b>9:00 – B4: Greenwashing vs greenhushing</b></p> <ul style="list-style-type: none"> <li>• How are US corporates and investors navigating political and public scrutiny of sustainability?</li> <li>• What are the implications of corporate greenhushing for investors?</li> <li>• How have investors responded to the SEC’s greenwashing crackdown?</li> </ul> <p>Moderator: <b>Dominic Webb</b>, Senior Reporter, <b>Responsible Investor</b></p> <p><b>Ekaterina Grigoryeva</b>, Environment and Social Development Specialist (Global Lead, Financial Sector), <b>The World Bank</b></p> <p><b>Ashley McNamee</b>, Managing Director, ESG, <b>Revelstoke Capital Partners</b></p> <p><b>Andrew Lee</b>, Managing Director, Managing Director – Global Head of Sustainable and Impact Investing, <b>UBS Global Wealth Management</b></p> <p><b>Lance Dial</b>, Partner, <b>K&amp;L Gates</b></p>
<p>09:40 Short turnaround break</p>	
<p><b>09:45 – A5: Governance risk: Board competence and capabilities</b></p>	<p><b>09:45 – B5: Real estate and climate risk</b></p>

<ul style="list-style-type: none"> <li>• How are investors approaching governance risk?</li> <li>• How do governance failures impact investor confidence and company valuation?</li> <li>• What are the emerging standards for governance transparency and reporting?</li> <li>• How can companies improve their disclosure practices to build trust with investors?</li> <li>• AI board competence</li> </ul> <p>Moderator: <b>Matt Moscardi</b>, Head of Board Moneyball, <b>Free Float Analytics</b></p> <p><b>Marcel Bucscu</b>, Vice President, Strategic Engagement, <b>NACD</b></p>	<ul style="list-style-type: none"> <li>• Decarbonising real estate – a missed low-hanging fruit opportunity for investors?</li> <li>• Real estate climate engagement</li> <li>• Uninsurable assets: what does this mean for real estate investors?</li> <li>• How are US real estate developers approaching the net zero challenge?</li> </ul> <p><b>Marina Severinovsky</b>, Head of Sustainability North America, <b>Schroders</b></p> <p><b>Brenden McEneaney</b>, Senior Vice President, <b>JLL</b></p> <p><b>Tom Idzal</b>, Head of Americas, <b>GRESB</b></p> <p><b>Daren Moss</b>, Principal, ESG - Real Estate Lead, <b>Ares Management</b></p>
--	---

10:25 Networking break

## 10:55 Plenary 5: Investing for sustainable outcomes in 2025

- Defining a ‘sustainable outcome’ or proving real-world sustainability impact in 2024: what methods and frameworks are investors using?
- Net-zero commitments and interim climate investing goals: are investors on track to meet them?
- The US renewable energy market is continuing to boom – the IRA has been referred to as the US green taxonomy: to what extent is this translating to opportunities for sustainability focussed investors in public markets?

Moderator: **Steven Rothstein**, Managing Director, Accelerator, **Ceres**

**Sarah Bernstein**, Head of Sustainability, **Meketa Investment Group**

**Wendy Cromwell**, Head of Sustainable Investment, **Wellington Management**

**Lila Preston**, Head of Growth Equity, **Generation Investment Management**

## 11:35 Plenary 6: The state of corporate reporting in the US

- How are US corporates currently approaching sustainability reporting?
- Does corporate reporting in the US meet the needs of investors?
- Will ISSB become the de facto standard for corporate sustainability reporting in the US?
- What assurance are investors asking for on non-financial corporate disclosures?



**Neil Stewart**, Director of Corporate Outreach, **ISSB/IFRS Foundation**

**Meagen Stack**, Manager, ESG Reporting, **Chevron**

**Aeisha Magstani**, Senior Portfolio Manager, Sustainable Investment & Stewardship Strategies, **CALSTRS**

**Caitlin McSherry**, Head of Investment Stewardship, **Neuberger Berman**

12:15 Lunch

**13:05 Keynote**

**Aeisha Magstani**, Senior Portfolio Manager, Sustainable Investment & Stewardship Strategies, **CALSTRS**

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**

**13:25 Plenary 7: After Exxon: The future of shareholder proposals**

- What are the implications for shareholder rights in the US of the Exxon lawsuit?
- Will the file-first mentality of shareholders shift towards a more engagement/dialogue-focused approach?
- Will other companies follow Exxon's lead?
- How can shareholder proposals be used most effectively in a sustainability context?

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

**Sanford Lewis**, Director, **Shareholder Rights Group**

**Danielle Fugere**, President & Chief Counsel, **As You Sow**

**Heidi Welsh**, Executive Director, **Sustainable Investments Institute (Si2)**

**14:10 Plenary 8: Fiduciary duty in 2024: Operating effectively within a polarized environment**

- Beyond the politics: What does fiduciary duty look like for a universal owner in 2024?
- Which issues are necessary for a fiduciary to consider? Are some like AMR being overlooked?
- How can a universal owner mitigate systemic risks to portfolios?
- To what extent can sustainability preferences – and outcomes – be factored into fiduciary duty?

Moderator: **Dominic Webb**, Senior Reporter, **Responsible Investor**

**Fran Seegull**, President, **U.S. Impact Investing Alliance**

**Colin Melvin**, Founder & Managing Director, **Arkadiko Partners**

**Deborah Ng**, Head of ESG and Sustainability, **GMO (Hold)**

15:00 End of conference

