

## Thriving in the rapidly evolving US sustainable finance landscape

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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

**Tuesday 3 December**

**08:55 Opening remarks**

**Lucy Fitzgeorge-Parker**, Editor, **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**

**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: **Lucy Fitzgeorge-Parker**, Editor, **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: **Lucy Fitzgeorge-Parker**, Editor, **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**

13:00 Lunch

Stream A	Stream B
<p><b>13:50 – A1: Corporate transition plans: Next steps</b></p> <ul style="list-style-type: none"> <li>• What does a credible transition plan look like?</li> <li>• Are US companies embracing the concept of transition plans?</li> </ul>	<p><b>13:50 – B1: The future of collaborative engagement in the US</b></p> <ul style="list-style-type: none"> <li>• What exactly are the rules around collaborative engagement in the US?</li> <li>• All noise and no heat: do legal threats around antitrust carry any weight? If</li> </ul>

<ul style="list-style-type: none"> <li>• What guidance do companies and investors need? Prescriptive vs high-level</li> <li>• To what extent should climate lobbying activities be disclosed in transition plans?</li> </ul> <p><b>Andreas Ross</b>, Head of New Product Research and Development, <b>ZAIS Group</b>  <b>Joel Paque</b>, Head of Partnerships, US, <b>Climate Arc</b>  <b>Jacob Hupart</b>, Co-Chair of ESG Practice, <b>Mintz</b></p>	<p>so, where are the lines which shouldn't be crossed?</p> <ul style="list-style-type: none"> <li>• How much has the politicization of ESG stunted collective engagement in the US?</li> <li>• How can investors defend themselves against accusations? What is best practice?</li> </ul> <p><b>Marcela Pinilla</b>, Director of Sustainable Investing, <b>Zevin</b>  <b>Claudia Martinez</b>, Director of Research, <b>Access to Medicine Foundation</b></p>
<p>14:30 Short turnaround break</p>	
<p><b>14:35 – A2: ESG Data: The next frontier</b></p> <ul style="list-style-type: none"> <li>• Do companies have the data they need for mandatory climate reporting?</li> <li>• Supporting scope 3 data requirements</li> <li>• How is technology helping to meet the nature data challenge?</li> <li>• What are the biggest gaps in supply chain data?</li> </ul> <p><b>Samantha McCafferty</b>, Associate Director - Sustainable Investing, <b>Harvard Management Company</b>  <b>Paul Vozzella</b>, Director, Americas, <b>Asset Impact</b>  <b>Greer Howard-Tabah</b>, Vice President, ESG, <b>Oaktree Capital Management</b></p>	<p><b>14:35 – B2: Agriculture: Sustainability and food security</b></p> <ul style="list-style-type: none"> <li>• How are US investors thinking about agriculture and sustainability?</li> <li>• Is supporting food security compatible with financial institutions' net zero commitments?</li> <li>• How is technology changing the agricultural sustainability landscape?</li> <li>• Is regenerative agriculture a scalable solution?</li> </ul> <p><b>Chris Janiec</b>, Americas Editor, <b>Agri Investor</b>  <b>Sofia De La Parra</b>, Investor Outreach Manager, <b>FAIRR</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> </ul>	<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> </ul>



<ul style="list-style-type: none"> <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><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>	<ul style="list-style-type: none"> <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>
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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 – Scope 3</b></p>	<p><b>Workshop B – Climate adaptation</b></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</li> </ul>
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		<p>theories, demographic shifts, space exploration, and increased longevity for investing?</p> <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>
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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 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><b>Patrick O’Connell</b>, Director of Responsible Investing Research, <b>AllianceBernstein</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> <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><b>Matt Moscardi</b>, Head of Board Moneyball, <b>Free Float Analytics</b> (moderator)</p> <p><b>Marcel Bucsescu</b>, Vice President, Strategic Engagement, <b>NACD</b></p>	<p><b>09:45 – B5: Real estate and climate risk</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>

10:25 Networking break

**10:55 Plenary 5: Investing for sustainable outcomes**

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

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

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

12:15 Lunch

### 13:05 Keynote

### 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?

**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**

15:00 End of conference