



9th Annual Responsible Investment Forum: New York

4-5 March, 2025

Convene, 117 West 46th Street, New York

Generating Alpha through Sustainability

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CONFIRMED SPEAKERS

Avantika Saisekar, Managing Director of Sustainable Investing, **Wafra Inc**

Eimear Palmer, Partner, Global Head of Sustainability, **Pantheon**

Marc Lino, Senior Partner, Global ESG Leader for Private Equity, **Bain & Company**

Christina Anzel, Director, Client Team, **Generation Investment Management**

Roraj Pradhananga, Co-Chief Investment Officer, **Veris Wealth Partners**

Will Relle, Director, ESG, **HarbourVest**

Michael Dymond, Senior Portfolio Manager, Private Equity, **APG Asset Management**

Michael Kashani, Managing Director, **Apollo Global Management**

Brittany Agostino, Principal, ESG - US Credit Lead, **Ares Management**

Jovana Stopic, ESG Director, **IK Partners**

Lexi Wachter, Vice President, Sustainability, **General Atlantic**

Deike Diers, Partner, Sustainability for Private Equity and Financial Investors, **Bain & Company**

Marianne Voss, Managing Director & Chief ESG Officer, **Webster Equity Partners**

Chris Brannan, Assistant General Counsel & ESG Officer, **Pritzker Private Capital**



Day One: 4 March

07:45

LP/GP Networking Breakfast hosted PRI

08:30

Introduction from PEI

8:40

Keynote Interview: the future of sustainability in a rapidly changing political and economic environment in North America and globally

9:10

How sustainability professionals and their teams evolving and growing their influence within funds?

- Considering different team structures: where and how can sustainability heads be most effective?
- Dealing with the increased demands from regulators and LPs around sustainability: How can mid-market managers keep up?
- What new roles are being created within sustainability teams and where are external experts being brought in?
- Successful stories of those with influence throughout the deal cycle

Avantika Saisekar, Managing Director of Sustainable Investing, **Wafra Inc**

Eimear Palmer, Partner, Global Head of Sustainability, **Pantheon**

9:45

iCI: How managers and investors are approaching decarbonization and net-zero

- Implementing best practices in portfolio decarbonization: to what extent can decarbonization be part of wider value creation plans?
- Balancing short-term returns with long-term net-zero goals
- Industry approaches to decarbonization and how do they compare
- LP perspective – what do LPs want, how some are requiring a net-zero plan from GPs (and is this cross-portfolio at or at the fund)

Moderator: **Marc Lino**, Senior Partner, Global ESG Leader for Private Equity, **Bain & Company**

Michael Dymond, Senior Portfolio Manager, Private Equity, **APG Asset Management**



10:20

EDCI Update: what's next and how is the initiative evolving?

- Outlining some of the new metrics to the EDI, specifically the “Net Zero Commitment” metric
- How incorporating EDCI is streamlining compliance efforts
- Three years in: how are GPs and LPs making use of the data collected to help in value creation?
- What would managers and investors like to see next?

11:00

Coffee & networking

11:30

The next frontier: to what extent can addressing nature and biodiversity drive returns?

- How to assess risks and opportunities in the diligence process
- What metrics are emerging to capture the true value of natural capital?
- The interaction between climate and nature: to what extent can biodiversity be used to reduce climate risk?
- Examples from funds who are using biodiversity and nature to drive value

Moderator: **Ramboll**

Jovana Stopic, ESG Director, **IK Partners**

Will Relle, Director, ESG, **HarbourVest**

12:10

Why do so many US GPs overlook sustainability as a strategic value driver?

- The value of sustainability: why and how does it drive returns
- Spotting value creation opportunities during due diligence
- The importance of adding sustainability to a value creation playbook
- Case studies from those who have increased returns for their funds

Senior representative, **ERM**



12:45

Portfolio company perspectives on how sustainability can help grow their business

- How are portfolio companies measuring the ROI of sustainability efforts and translating these metrics into tangible business outcomes?
- How do portcos navigate potential trade-offs between short-term financial performance and long-term sustainable growth?
- Success stories and case studies where sustainability has directly contributed to business expansion and market penetration
- What can GPs do to support their portfolio companies in their sustainability journey?

13:15

Lunch

<p align="center">Track A <u>IMPACT & TRANSITION</u></p>	<p align="center">Track B <u>VALUE CREATION</u></p>	<p align="center">Track C <u>REGULATION & FRAMEWORKS</u></p>	<p align="center">Track D <u>CIRCULAR ECONOMY/PRIVATE DEBT/GOVERNANCE</u></p>
<p><u>14:15</u> The state of the impact & transition market in North America</p> <ul style="list-style-type: none"> - Is there a trade-off between delivering impact and returns? - How significant has the ESG backlash been on the impact market? - How are corporates' net-zero efforts driving opportunities in the impact market in terms of exits and allocations? 	<p><u>14:15</u> Driving and demonstrating returns from sustainable value creation in investments</p> <ul style="list-style-type: none"> - To what extent are we at a stage where funds can tell a story of value added? - Emphasizing the importance of engaging investment teams in sustainability throughout the investment - Ensuring sustainability initiatives are well-resourced and supported at a senior level within portfolio companies 	<p><u>14:15</u> SEC and local regulations in the U.S.</p> <ul style="list-style-type: none"> - Is there a value creation opportunity in latest SEC regulation? - Who is responsible for implementation? How much are ESG teams working with compliance professionals? - Looking specifically at new laws in California and elsewhere 	<p><u>14:15</u> Navigating voluntary carbon markets</p> <ul style="list-style-type: none"> - Outlining the potential of voluntary carbon markets - Best practices for GPs who are offsetting emissions through offsets - What is needed to attract more investors into this growing and important space



	<p>Moderator: Deike Diers, Partner, Sustainability for Private Equity and Financial Investors, Bain & Company</p>		
<p>14:55 LP panel: asset owner perspectives on allocating to impact funds</p> <ul style="list-style-type: none"> - Is the collective pool of impact-orientated capital likely to grow in the coming 5 years in North America? - What investment themes resonate most with asset owners? - How has the sentiment for investments in climate-oriented strategies evolved? <p>Roraj Pradhananga, Co-Chief Investment Officer, Veris Wealth Partners</p>	<p>14:55 Sustainability during exits in a tough environment</p> <ul style="list-style-type: none"> - To what extent are sustainability teams involved in exit preparation? - Preparing for exit: how can sustainability teams make a company more attractive to a future buyer? - ESG considerations when exiting via IPO vs. a sale to another PE buyer <p>Senior representative, ERM Lexi Wachter, Vice President, Sustainability, General Atlantic Jeannie Cho, Director, Sustainable Investing, KKR</p>	<p>14:55 SFDR and U.S. managers: tips for global funds (off-record)</p> <ul style="list-style-type: none"> - To what extent are EU investors making demands of U.S. funds due to SFDR? - Outlining some of the possible costs and challenges associated with this increased compliance burden - Is there an opportunity to gain a competitive edge by meeting requirements? <p>Christina Bortz, Deputy General Counsel, ESG, TPG Angelo Gordon</p>	<p>14:55 Navigating voluntary carbon markets</p> <ul style="list-style-type: none"> - Outlining the potential of voluntary carbon markets - Best practices for GPs who are offsetting emissions through offsets - What is needed to attract more investors into this growing and important space
<p>15:35 Impact, climate & transition investing: fundraising in a competitive space</p> <ul style="list-style-type: none"> - Standing out in a crowded market: strategies to differentiate your fund amidst an influx of new entrants 	<p>15:35 Why human capital management is now the number one lever in value creation</p> <ul style="list-style-type: none"> - Defining company culture and aligning it with sustainability and value creation plans - To what extent should sustainability heads work with in-house human capital operating partners 	<p>15:35 Interoperability of different sustainability initiatives and frameworks</p> <ul style="list-style-type: none"> - To what extent are fragmented reporting standards impacting sustainability professionals? - Challenges and opportunities in scaling ESG Initiatives across global portfolios 	<p>15:35 How sustainability is continuing to evolve in private debt</p> <ul style="list-style-type: none"> - To what extent are lenders and sponsors engaging on sustainability efforts? - What tools can private credit investors use to understand where their portfolio stands in terms of



<ul style="list-style-type: none"> - Demonstrating tangible value creation: effectively showcasing the real-world impact and financial returns of portfolio companies to investors. - Strategic Focus: Weighing the benefits and trade-offs of adopting a single-focus versus a broader impact strategy <p>Christina Anzel, Director, Client Team, Generation Investment Management</p>	<ul style="list-style-type: none"> - How are funds changing their approach to DEI in a politicised environment? <p>Marianne Voss, Managing Director & Chief ESG Officer, Webster Equity Partners</p>	<ul style="list-style-type: none"> - Leveraging technology to bridge gaps in sustainability reporting <p>Chris Brannan, Assistant General Counsel & ESG Officer, Pritzker Private Capital</p>	<ul style="list-style-type: none"> - decarbonisation status and climate risk? - Sustainability linked loans: The importance of setting borrowers useful and sector-specific KPIs <p>Brittany Agostino, Principal, ESG - US Credit Lead, Ares Management</p>
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16:15 Coffee & networking

16:45 Working Group Series A

This working session will be open to all - interactive roundtable discussion with designated facilitators. Service providers should not join sessions led by their direct competitors but can join other sessions.

<p><u>Working Group A</u> Biodiversity</p>	<p><u>Working Group B</u> Value Creation Masterclass</p>	<p><u>Working Group C</u> Turning regulation into a value creation opportunity</p>	<p><u>Working Group D</u> Making use of ESG Data</p>	<p><u>Working Group E</u> Working with portfolio companies</p>	<p><u>Working Group F</u> Decarbonization</p>
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17:45

Close of conference followed by cocktails



Day Two: 5 March

08:00 Invitation only LP and GP Breakfast briefings

09:05 Opening remarks

09:05 Opening remarks

<p>09:10 Challenges and opportunities from AI for sustainability</p> <ul style="list-style-type: none"> - The extent to which the energy demanded by AI will make reaching net-zero targets more challenging - How AI can be used to identify investment opportunities - Could AI-driven insights improve risk management, and help in supporting long-term sustainability goals by easing the burden on sustainability teams 	<p>09:10 Why human rights risks in the supply chain is rising up the agenda of US PE funds</p> <ul style="list-style-type: none"> - Identifying and mitigating human rights risks in portfolio companies' supply chains - Navigating challenges in companies with global supply chains - Learn from experienced funds on conducting effective human rights assessments of their portfolios
<p>09:50 How AI is being practically used by sustainability professionals in private markets</p> <ul style="list-style-type: none"> - Cutting through the froth: what is happening now? - Examples from leading funds who are making use of AI in their day-to-day sustainability work - What's next and what does it mean for the sustainability function? 	<p>09:50 Defining governance for private markets</p> <ul style="list-style-type: none"> - What does good governance look like, and how can diversified funds standardize across varied company sizes and types? - Where should governance responsibilities sit—under legal/compliance or sustainability? - Examples of funds leading the way in governance best practices

10:30 Coffee & networking

11:00

Fireside Chat: how and why Apollo is leveraging sustainability to drive value creation across its portfolio

Michael Kashani, Managing Director, Apollo Global Management



11:30

Global LP perspectives on sustainable investing in North America

- To what extent are allocations being impacted by sustainability?
- What impact is SFDR having on relationships between European investors and U.S. based managers?
- Which U.S. sustainable investment strategies are most attractive to LPs?
- What are some best practices for U.S. funds seeking to attract investment from European and Asian LPs?

12:15

ESG Controversies: A Comparative Study of Public vs Private Sectors

12:10

ESG Value Creation Case Study Sessions

3 short presentations on how ESG initiatives or technologies can be used to drive returns within PE investments within different areas of sustainability. The audience will have the chance to quiz the presenters after their presentations. During the lunchbreak presenters will be available for further questions over informal roundtables

13:15

Lunch

14:00

Working Group Series B

15:00

Close of conference