

New
Private Markets

Impact & Transition Investor Summit North America 2024

12-13 November | The Westin Times Square, New York

The leading event series for impact investing in private markets

Event website: www.peievents.com/en/event/impact-investor-summit-north-america

Draft agenda

Day one - Tuesday 12th November 2024

8.00 *Networking breakfast and registration*

9.00 *Chair's opening remarks*

Jennifer Kenning, CEO & Co-Founder, **Align Impact**

9.05 **Plenary #1: The state of the impact market**

Moderated by Marieke Spence, Executive Director, **Impact Capital Managers**

- Jed Emerson, Chief Impact Officer, **ALTi Tiedemann Global**
- Bill Orum, Partner, **Capricorn Investment Group**
- Anna Snider, Head of Investment Selection, Chief Investment Office, Global Wealth and Investment Management, **Bank of America**

9.50 **Plenary #2: Policy, regulations, and politics: the US election result and the implications for impact investing**

Moderated by Laurie Lane-Zucker, Founder and CEO, **Impact Entrepreneur**

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- Fran Seegull, President, **U.S. Impact Investing Alliance**
- Jack Moriarty, Executive Director, **Lafayette Square Institute**
- Gayle Miller, Senior Advisor, Global Client Group, **Brookfield**

10.30 *Break*

11.00 **Morning keynote: Are investors building portfolios for the right future?**

Traditional methods of asset allocation are backwards looking, but externalities like climate change and biodiversity loss mean that the future will certainly not look like the past. Benchmarking a more realistic future will clarify risks to current holdings, identify regions and sectors where institutional investors can have the greatest impact, and improve returns through new investment. In this keynote session we'll explore:

- Will portfolios aligned with legacy benchmarks be unprepared for the future?
- How will benchmarking a more realistic future improve risk adjusted returns?
- Who's pioneering new approaches to benchmarking?
- In practice, do institutional investors, such as pensions and SWF's, have the capacity to adjust their benchmarking practices?

*Scott Kalb, CEO, **KLTI Advisors**; Director, Responsible Asset Allocator Initiative, **Fletcher School at Tufts**; former CIO and Deputy CEO of the **Korea Investment Corporation (KIC)***

11.20 **Plenary #3: Allocator outlook: what is driving investment to impact funds for different types of LPs?**

Moderated by Alexandra Farmer, Partner, ESG & Impact, **Kirkland & Ellis**

- Andrew Siwo, Director of Sustainable Investments and Climate Solutions, **New York State Common Retirement Fund**
- Mark Berryman, Managing Director, **Caprock**
- Jessica Pan, Senior Portfolio Manager, Private Equity, **APG**
- Sakib Rashid, Director, Impact, **Rede Partners**

12.00 **Day one keynote: Scaling nature and climate transition investments: What's needed to build a better future?**

Nature and climate transition investments has grown significantly. Between 2019 and 2022, private equity climate investments grew 2.5 times from \$75 billion to \$196 billion, with 50 percent deployed into energy. Private finance for nature-based solutions has grown from \$9.4 billion to more than \$100 billion over the last four years. In this keynote address, Manulife IM's chief sustainability officer will explore:

- What is driving this surge in nature and climate investing?
- How should we think about the intersection of finance, nature, and climate transition solutions?
- What will be required to scale private sector action in this rapidly changing environment?
- Where's the alpha in nature-related investing?

Brian Kernohan, Chief Sustainability Officer, **Manulife Investment Management**

12.20 **Plenary #4: Deep dive into transition investing: scalability, returns prospects and impact**

Moderated by Daniel Pianko, Managing Director, **Achieve Partners**

- Chavon Sutton, Senior Investment Director, Sustainable & Impact Investing Research, **Cambridge Associates**
- Jennifer Pryce, President and CEO, **Calvert Impact**
- Preeti Bhattacharji, Head of Sustainable Investing, US Private Bank, **JPMorgan Chase & Co.**
- Kunal Doshi, Chief Investment Officer, **Accelerate Investment Group**

13.00 Lunch

After lunch the conference splits into three streams, the streamed sessions are designed for you to hear from best-in-theme managers and get detailed insights on the innovations, trends and investment opportunities on the horizon.

	Social impact	Transition investing	Nature & environment
14.00-14.45	<p>Addressing growing inequality and social justice: what models have scale potential?</p> <p>Moderated by Joohee Rand, Head of Secretariat, Director, Impact Principles, GIIN</p> <ul style="list-style-type: none"> Jessie Duncan, Program Director, Tipping Point Fund on Impact Investing Iraz Soyalp, Director, Social Impact, Private Markets, Manulife Investment Management Liz Roberts, Head of Impact Investing, MassMutual Jacob Haar, Managing Partner and Chief Investment Officer, Community Investment Management Sheena Strawter-Anthony, Director of Impact Investment Strategy, William Caspar Graustein Memorial Fund 	<p>Climate and energy transition in the US: understanding the investment opportunities in light of the IRA</p> <p>Moderated by Garrett Jaso, Senior Manager, Communications & Policy, Impact Capital Managers</p> <ul style="list-style-type: none"> Jonathan Hirschtritt, Managing Director, Sustainability, GCM Grosvenor Holland Davis, Principal, HarbourVest Katherine Fackler, Associate Portfolio Manager, CalSTRs Mike Reynolds, Partner, Ultra Capital 	<p>Nature impact investing: how to make money off carbon and nature?</p> <p>Moderated by Chris Janiec, Americas Editor - Agri Investor, PEI</p> <ul style="list-style-type: none"> Pooja Yadav, Principal, Azarine Nick Dilks, Managing Partner, Ecosystem Investment Partners Mark Canavan, <i>former</i> Head of Real Assets, New Mexico Educational Retirement Board Ghita Benabderrazik, Director, Innovative Finance, Rockefeller Foundation
14.45-14.50	Changeover break		
	<p>Deep dive into the future of work, education and skills</p> <p>Moderated by Amy Nelson, Managing Partner, Rethink Education</p> <ul style="list-style-type: none"> Tong Gu, Founding Partner, Pact 	<p>How to invest in industrial decarbonisation</p> <p>Moderated by Susan McGeachie, Co-Founder & Managing Partner, Global Climate Finance Accelerator</p> <ul style="list-style-type: none"> Melissa Cheong, Managing Partner, Blackhorn Ventures 	<p>Climate resilience & adaptation: going beyond mitigation</p> <p>Moderated by Toby Mitchenall, Editor, New Private Markets</p>

14.50-15.35	<ul style="list-style-type: none"> Ashley Bittner, Managing Partner, Kalos Ventures Josh Tanenbaum, Founder & Managing Partner, Rebalance Capital Sabari Raja, Managing Partner, JFFVentures 	<ul style="list-style-type: none"> Thomas Mastrobuoni, Chief Investment Officer, Big Idea Ventures Jeff Sheridan, Managing Partner & Chief Revenue Officer, Overlay Capital Rahul Advani, CEO and Managing Partner, SER Capital Partners 	<ul style="list-style-type: none"> Avantika Saisekar, Managing Director of Sustainable Investing, Wafra Mike Fang, Senior Portfolio Manager, Maryland State Retirement and Pension System Sharo Atmeh, Co-Founder & COO, Montauk Climate Holdings
15.35-16.00	Networking break		
16.00-16.45	<p>DE&I: what does the future of DE&I investing hold?</p> <p>Moderated by Angelica Nikolausson, Managing Director, Impact Investments, Global Endowment Management</p> <ul style="list-style-type: none"> Kenneth Saffold, Co-Founder and Managing Partner, o15 Capital Partners Nicolle Richards, Senior Manager, Investments, Gary Community Ventures Daryn Dodson, Managing Director, Illumen Capital Regina Kline, Founder and Managing Partner, Enable Ventures 	<p>Artificial intelligence deep dive: how to approach this seismic investment opportunity (and risk)?</p> <p>Moderated by Kelsey Jarrett, Director of Impact, SJF Ventures</p> <ul style="list-style-type: none"> Lyne Landry, Partner, Agetech Capital Josh Cohen, Partner, City Light Capital Mike Kubzansky, CEO, Omidyar Network 	<p>Ocean health and blue economy: a growing asset class</p> <p>Moderated by Diane Damskey, Director of Strategic Development, Ocean us</p> <ul style="list-style-type: none"> Chris Gorell Barnes, Founding Partner, Ocean14 Capital Rodrigo Prudencio, Managing Partner, Propeller VC Ted Janulis, Founder & Principal, Investable Oceans
16.45-16.50	Changeover break		
16.50-17.35	<p>Ownership economy: impact investing to address wealth inequality</p> <p>Moderated by Lauren Sercu, Co-Founder & Managing Partner, Sorenson Impact Advisory</p> <ul style="list-style-type: none"> David Williams, Director, Lafayette Square 	<p>Climate justice: what's the investment case?</p> <p>Moderated by Claire Smith, CIO, Beyond Impact</p> <ul style="list-style-type: none"> Roraj Pradhananga, Co-Chief Investment Officer, Veris Wealth Partners 	<p>Blended finance: a new dawn for an old idea</p> <p>Moderated by Laurie Lane-Zucker, Founder and CEO, Impact Entrepreneur</p> <ul style="list-style-type: none"> Daniel Firger, Advisor, Sustainable Finance, Bezos Earth Fund

- Chris Herrmann, EVP, Chief Investment Officer & Fund Manager, Real Estate Equity, **Enterprise Community Investment**
- Smitha Das, Senior Director, Investments, **World Education Services (WES)**
- Todd Leverette, Founding Partner, **Apis & Heritage Capital Partners**

- Omar Blayton, Chief Financial Officer, **Sunwealth**
- Tracy Gray, Founder and Managing Partner, **The 22 Fund**
- Sandra Kartt, Deputy Chief Investment Officer, **ImpactAssets Capital Partners**

- Abhisheik Dhawan, Sustainable Finance and Partnerships Specialist, **United Nations Capital Development Fund**
- Caroline Flammer, A. Barton Hepburn Professor of Economics, **Columbia University**
- Avra Van der Zee, COO, **Elemental Impact**

17.35 Evening networking reception

Day two - Wednesday 13th November 2024

7.00 Networking breakfast and registration

Day two morning workshops

8.00-9.00 am - LP workshop: Impact allocator working group

Chaired by Jennifer Kenning, CEO & Co-Founder, **Align Impact**

- Keren Raz, Senior RI Manager - Global Private Equity, **APG**
- Lauren Sercu, Co-Founder & Managing Partner, **Sorenson Impact Advisory**
- Bhavika Vyas, Managing Director, **StepStone Group**

8.00-9.00 am - Developing an impact contract toolkit

Jennie Morawetz, ESG & Impact Partner, **Kirkland & Ellis**

Mackenzie Drutowski, ESG & Impact Partner, **Kirkland & Ellis**

Day two agenda begins at 9.45 am

	Stream A	Stream B
9.45-10.30	<p>The measurement & metrics of impact performance</p> <p>Moderated by Daniel Firger, Advisor, Sustainable Finance, Bezos Earth Fund</p> <ul style="list-style-type: none"> • Mike McCreless, Founder and Executive Director, Impact Frontiers • Kelly Gauthier, President, Rally Assets • Michele Demers, Founder & CEO, Boundless Impact Research & Analytics 	<p>Buyout, secondaries, GP-stakes and beyond: which impact strategies and products are gaining traction?</p> <p>Moderated by Marieke Spence, Executive Director, Impact Capital Managers</p> <ul style="list-style-type: none"> • Priya Parrish, Partner and Chief Investment Officer, Impact Engine • Marie-Celine Damnon, Investment Associate, Capricorn Investment Group • Hailey Salito, Vice President, Ascend Partners

10.30-11.00	Networking break	
11.00-11.45	<p>Elevator pitches: The best up-and-coming managers across impact investment themes</p> <ol style="list-style-type: none"> 1. Donna Sims Wilson, Chief Operating Officer, Kah Capital Management 2. Lyne Landry, Partner, Agetech Capital 3. Regina Kline, Founder and Managing Partner, Enable Ventures 	<p>Differentiating an impact fund in a crowd: what's the secret sauce to impact fundraising success?</p> <p>Moderated by Jyoti Aggarwala, Senior ESG Consultant & Private Markets Business Development Professional, Private Capital Raise</p> <ul style="list-style-type: none"> • Christina Anzel, Director, Generation Investment Management • Etienne Ekpo-Utip, Head of Climate & Impact, Rede Partners • Jessamine Fitzpatrick, Co-Founder & Managing Director, Alder Point Capital Management
11.45-12.30	<p>Going all in: Operationalising a 100% impact portfolio commitment</p> <p>Moderated by Lauren Cochran, Founder and Managing Partner, Azarine</p> <ul style="list-style-type: none"> • Dana Lanza, CEO, Confluence Philanthropy • Mark Hays, Managing Director, Director of Sustainable and Impact Investing, Glenmede • Amanda Feldman, Managing Director & Head of Impact Engagement, Sonen Capital • Kate Huntington, Head of Advisory Solutions Group and Managing Director, Fiduciary Trust International 	<p>The rise of impact credit strategies</p> <p>Moderated by Manju Seal, Investment Advisor, Global Climate Finance Accelerator</p> <ul style="list-style-type: none"> • Beata Kirr, Chief Impact Officer, The Copia Group • Amy Wang, Managing Director (Head of Private Credit), Blue Earth Capital • Adriana Becerra Cid, Sustainable Investing Lead for Private Markets, Lombard Odier Asset Management • Brian Wayne, Managing Partner, CurvePoint Capital

12.30 Lunch

13:30 **Day two keynote: Going mainstream - The evolution of private equity and the investor-led climate 'uprising'**

In this keynote address we hear from one of the leading voices in global private equity, Virginie Morgon, Founder and Managing Partner of the newly launched Ardabelle Capital. Virginie also led Eurazeo, one of Europe's biggest PE houses, as CEO from 2018 – 2023. In this session we'll hear:

- How have the winning strategies in private equity evolved and who will be the winners of the next era?
- What are the novel metrics and new lens investors can use to spot value in the market that traditional players miss?
- How can investors decode the multi-trillion-dollar opportunity in reshaping and shifting global systems?
- What strategies capitalize on climate trends and how can private equity firms lead the fight against climate change?

Virginie Morgon, Managing Partner, **Ardabelle Capital**

13:45 **Plenary #5: Debate: 'Impact Investing', as a term, is no longer fit-for-purpose**

This is an Oxford-style debate in which we'll have two speakers for the proposition and two speakers against, with audience voting on their views at the start and at the end of the session. This session will be an off-the-record discussion.

The substance of the debate is whether 'impact investing' as a collective phrase has run its course, and the market needs a new term and a new sense of identity to match the reality of today's investment environment. In this session we'll look to bring more clarity to the above addressing such questions as: is the term 'impact' too broad to be meaningful any longer? Does the impact label put certain LP investors off? What does impact investing mean to LPs in terms of the benefit to their portfolio? and how are funds labelling themselves to be as relevant as possible to today's asset owners?

Chaired by Mark Berryman, Managing Director, **Caprock**

Jennifer Kenning, CEO & Co-Founder, **Align Impact**
Patience Ball, Impact Chair, **Apollo Global Management**

Daniel Pianko, Managing Director, **Achieve Partners**
Carl Forster, Director, Investment Advisory & Partner, **Aspiriant**

14:45 Short afternoon break

15.00 **Keynote #3: The Waste Free World - the proof and the potential of transitioning to a circular economy**

- What is the financial opportunity of the transition to a circular economy?
- What are the key tailwinds propelling the biggest global corporations to shift their value chains to circularity?
- How does circularity drive decarbonization and achieve net zero objectives?
- How do material science, technical innovation and upstream solutions contribute to systemic change?

Ron Gonen, Founder and CEO, **Closed Loop Partners**

15:15 **Closing plenary #6: Deep tech, AI and more: what technologies give us a shot at a sustainable world?**

Moderated by Susan McGeachie, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**

- Danielle Joseph, Managing Director, **Closed Loop Partners**
- Milo Werner, General Partner, **DCVC**
- Sasha Brown, Partner, **Ecosystem Integrity Fund**

16.00 Closing remarks

16.10 End of conference