

Private Equity  
International

# Responsible Investment Forum: West

Palo Alto 2024

4-5 September | Palo Alto

**Fusing responsible investing  
with innovation**

**PEI**

The Responsible Investment Forum: West is where innovation meets sustainability at the forefront of investment strategy. Join 200+ professionals in an all-new venue and location for a unique opportunity to discuss developing sustainable investment strategies that can enhance returns.



*"Great mix of GPs and LPs! The panels were interesting and covered pertinent topics."*  
Norgay Partners

**200+**  
attendees

**50+**  
investors

**70+**  
speakers

# Find out who you could meet

Connect with institutional investors, fund managers, expert advisors, and highly recognized thought leaders. Past attending companies include:

- » Alpine Investors
- » Altamont Capital Partners
- » American Student Assistance
- » Ares
- » British Columbia Investment
- » Builders Vision
- » California Public Employees' Retirement System
- » CalSTRS
- » Cambridge Associates
- » Canadian Union of Public Employees
- » EcoVadis
- » EQT Partners
- » Equilibrium Capital Group
- » G2 Venture Partners
- » GIC
- » Hamilton Lane
- » HarbourVest Partners
- » Healthcare of Ontario Pension Plan
- » Hellman & Friedman
- » Investindustrial
- » IPC
- » Jasper Ridge Partners
- » Keller Enterprises
- » KKR
- » Lombard Odier Asset Management
- » Norgay Partners
- » North Sky Capital
- » Oaktree Capital Management
- » Office Of The Comptroller Of The City Of New York
- » PSP Investments
- » QIC
- » Ramboll
- » San Francisco Employees' Retirement System
- » Silver Lake
- » Sonen Capital
- » United Church Funds
- » University of California
- » World Bank Group
- » And many more

[View past attendee list ↗](#)

# Session highlights

Set the direction for your responsible investment strategies



## The evolution of US private funds in addressing sustainability within their portfolios

- » Feast or famine - does impact / sustainability intentionality drive or constrain investible opportunity set?
- » How do large investors view the sustainable investing across asset classes?
- » Has the ESG 'backlash' had any impact on private funds' approach to sustainability?
- » How do current policies such as the IRA enhance or constrain technology risk appetite within sustainability-focused portfolios?

## The integration of ESG into value creation plans

- » How tech-driven solutions can drive value creation
- » Balancing the long-term positive impact from sustainability initiatives when the benefits may be realised by subsequent owners
- » Employing data-driven methodologies to move beyond anecdotal evidence effectively demonstrating value and measuring outcomes of ESG initiatives
- » Exploring the collaboration between the sustainability function fund stakeholders and portfolio companies

## Scope 3 & California State - Strategies for reduction and compliance

- » Exploring the current policies and regulations and how they drive positive change towards a more sustainable future
- » How portcos are effectively measuring managing and reducing their Scope 3 emissions
- » Exploring methods to implement transparency and accountability in disclosing Scope 3 emissions
- » What the Scope 3 Emissions California Law means for the rest of the US

[View full agenda ↻](#)

# Hear from responsible investment leaders



**Christina Anzel**  
Director  
**Generation Investment  
Management**



**Lara Banks**  
Managing Director and  
Co-Head of Private Equity  
**Makena Capital**



**Andy Caine**  
COO & Partner  
**Frazier Healthcare  
Partners**



**Jessica Clavette**  
ESG Manager  
**Equistone Partners  
Europe**



**Kunal Doshi**  
Chief Investment Officer  
**Accelerate Investment  
Group**



**Peter Dunbar**  
Principal, Responsible  
Investment  
**StepStone Group**



**Katie Fackler**  
Associate Portfolio Manager  
**CalSTRS**



**Jennifer Flood**  
Sustainability, Head of  
North America  
**Investindustrial**



**Amy Francetic**  
Managing General Partner,  
Co-Founder  
**Buoyant Ventures**



**Lindsay Gibson**  
ESG Lead, North America  
**Permira**

# Hear from responsible investment leaders



**Mark Green**  
Senior Responsible  
Investment Manager  
**UNPRI**



**Bruce Hao**  
Managing Director,  
Builders Asset Management  
**Builders Vision**



**Jessica Huang**  
Private Equity, ESG Lead  
**Ares**



**Matt Kaczmarek**  
Managing Director  
**Blackrock**



**Rhys Marsh**  
Portfolio Manager  
**Lombard Odier Asset  
Management**



**Melanie Nakagawa**  
Chief Sustainability Officer  
**Microsoft**



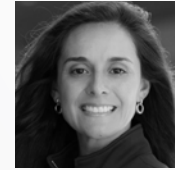
**Ashim Paun**  
Head of Sustainable  
Investing  
**Triton Partners**



**Mohammad Rasouli**  
Research Scholar  
**Stanford University  
Graduate School**



**Danielle Reed**  
Managing Director,  
Builders Initiative  
**Builders Vision**



**Isela Rosales**  
Managing Director,  
Head of ESG and  
Sustainability  
**Bridge Investment  
Group**

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For more information on sponsorship opportunities still available contact  
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As part of our commitment to sustainable and responsible business practices PEI Group has embedded the Ten Principles of the United Nations Global Compact into strategies and operations and committed to respecting human and labour rights safeguarding the environment and working against corruption in all its forms.