



EYES ON THE FUTURE

AGENDA



NAVIGATING POLARIZED ENVIRONMENT

In an increasingly polarized world and unstable market environment can pose significant challenges for investors seeking to uphold principles of equity and fairness. This subtheme explores strategies for navigating polarization and its implications for long-term investment decision-making.



COLLABORATIVE STEWARDSHIP IN AN ERA OF COMPLEXITY

As the pace of global changes accelerates, traditional models of stewardship are being tested. The challenges we face are interconnected and system-wide, from climate risk and social fragmentation to technological disruption. In this context, siloed strategies and short-term metrics can no longer suffice.



REDEFINING FIDUCIARY DUTY

We explore how fiduciary duty is being reinterpreted in a time of transition and what does it mean to act in the "best interests" of beneficiaries in a world shaped by systemic risks? We discuss on going topics on how do legal frameworks, investor expectations, and real-world outcomes intersect.



SCENARIO ANALYSIS AS A STRATEGIC COMPASS

How can forward-looking, scenario-based analysis move from a compliance tool to a strategic driver? We'll explore methodologies and how they can inform real-world decision-making across sectors.

Impact Summit America is a highly curated, invitation-only institutional investor and asset owner conference that annually brings together thought leaders and practitioners in the impact investing space. As a satellite conference to esteemed flagships Impact Summit Europe and Impact Summit Asia, Impact Summit America provides a trusted platform for investors from North America to catalyse institutional capital to support the most ambitious environmental & societal goals, promoting meaningful investments that go hand-in-hand with financial returns.

The programme will offer practical instruments for investors to increase their impact allocation, contributing to scaling their positive impact on people and the planet. It also provides the necessary content and tools to start investing for impact and returns.

We look forward to connecting leading North American institutional investors & asset owners for a meaningful dialogue at the 6th Impact Summit America in New York City.

ADVISING COMMITTEE

This agenda was shaped with input from industry experts:

- **Bhavika Vyas Vincent**, Managing Director, StepStone Group
- **Kavita Vijayan**, Senior Director, Head of Marketing, ImpactAssets
- **Keren Raz**, Senior RI Manager, APG Asset Management
- **Laura Weeks**, Senior Responsible Investment Manager, Principles for Responsible Investment
- **Mike McCreless**, Executive Director, Impact Frontiers
- **Ryan Malloy**, Research Analyst, Sustainable Investing, Fiduciary Trust

Hosted by:



PRELIMINARY AGENDA

Chair of the day:

Time	Session Description	
09:00 – 09:30	Registration for the Investors' breakfast workshop	
09:30 – 10:20	Investors' breakfast workshop <i>Developed by Impact Frontiers & Principles for Responsible Investment</i>	Asset Owner - only session
09:30 – 10:30	Registration & Welcome coffee (general attendance)	
10:30 – 10:40	Opening remarks Impact data deep dive by Phenix Capital Group Market Intelligence <i>In this session, Phenix Capital Group welcomes the delegates and will share the most current data in the impact industry globally and specifically in the North America region.</i>	Plenary
10:40 – 10:50	Keynote speech A call for collective action <i>This keynote explores how enduring climate progress requires a bold alliance across technology, business, community activism, and culture; each offering a unique path to change. In a time of political volatility and rising division, it calls for solutions that transcend election cycles and touch every part of society. By honouring innovation, justice, and imagination, the keynote underscores that we fight for the planet not only out of urgency, but because of the possibility we believe the future holds</i>	Plenary
10:50 – 12:00	Investor panel Investing in climate adaptation and resilience investments: is it just good business? <i>Investing in climate adaptation is no longer just a moral imperative, it's one of the most financially sound development strategies available. This session covers why adaptation is underfunded despite proven economic and social value and will highlight investable opportunities that deliver outsized impact even in the absence of climate disasters.</i>	Plenary
12:00 – 13:00	Lunch	

13:00 – 14:20 Breakout session A1 | InvestorConnect session Breakout A1

This dynamic session, consisting of 15-minute speed meetings, is designed to give asset owners an efficient way to learn about a selected group of impact strategies of institutional quality. This is an opportunity to enquire for more details, whilst making connections with other asset owners along the way.

13:00 – 13:35 Breakout session B1 | Re-thinking impact exclusions amid complexity Breakout B1

In this session, we address how exclusion lists are evolving (nuclear, fossil fuels, defence), and the ethical, financial, and geopolitical pressures that are reshaping decision-making. We also discuss the complexities of dual-use technologies and whether ethical frameworks can keep pace with innovation.

13:35 – 14:10 Breakout session B2 | Redefining the language of impact

As backlash grows, storytelling is becoming a critical strategic tool. How do we describe what we're doing, why it matters, and who it's for? This session looks at the role of language, transparency, and reframing.

14:10 – 14:30 Networking coffee break

14:30 – 15:20 Breakout session B3 Plenary

Interactive discussion | Myth busting LP-GP reporting standards

As impact investing matures, LPs are demanding clearer, more consistent reporting to assess whether funds are truly delivering on their stated impact goals. In session we cover certain myths from surveyed LPs & GPs around reporting challenges to unpack the root causes of these discrepancies. We'll explore how both sides can align expectations, improve data transparency, and co-create more effective, decision-useful impact reporting.

14:30 – 15:20 Breakout session B4
Panel discussion | Shareholder engagement in a new era of private wealth

We are entering a new era of investor influence where rising legal scrutiny intersects with rising generational values. As governance norms shift and ESG pushback grows louder, shareholder engagement is under the microscope. At the same time, a

historic wealth transfer is underway, with younger generations and underrepresented communities are bringing a deeper commitment to social equity, climate justice, and long-term stewardship.

This panel will focus on the rise of shareholder activism among next-gen and values-driven investors and how are private wealth holders use their capital and their voice to push for accountability? What happens when values-driven advocacy.

15:20 – 15:40 Networking coffee break

Plenary

15:40 – 16:40 Panel discussion | Public-Private collaboration in impact investing: navigating challenges and opportunities

In this panel, we explore how governments, private investors, and non-profit organizations can work together to enhance the effectiveness of social & environmental investment initiatives in the Americas. The discussion focuses on innovative financing mechanisms, policy frameworks, and strategies for overcoming coordination barriers at local, regional, and national levels.

16:40 – 17:00 Case Study | Infrastructure & the future of Power

Plenary

No matter the energy source: solar, wind, nuclear, or gas, everything flows through an outdated grid. How do investors, innovators, and policymakers collaborate to modernize infrastructure in the face of local resistance, regulation, and rising demand?

17:00 – 17:20 Keynote | The Future of Stewardship: from influence to accountability

Plenary

With growing scrutiny and fragmented political landscapes, the role of stewardship is shifting. What does credible, future-fit stewardship look like and who defines it?

17:20 – 18:30 Closing reception drinks

WHO SHOULD ATTEND:

INSTITUTIONAL INVESTORS & ASSET OWNERS

This invitation-only programme is catered for C-Suite, Board Members, Portfolio Managers, ESG/Impact Investing officers, and respective teams of:

- Public and Corporate Pension Funds and their Fiduciary Managers,
- Insurance Companies,
- Family Offices,
- Sovereign Wealth Funds & Development Finance Institutions,
- Foundations and Endowments,
- Wealth Managers/Private Banks,
- Faith-based Organisations

- *Asset owners may apply for a Complimentary ticket. [Please request an invitation >>](#)*
- *Other ecosystem players are welcome to find [participation options here>>](#)*

[WEBSITE PAGE >>](#)

[REGISTRATION PAGE >>](#)

