

**IMPACT  
SUMMIT  
AMERICA**

IMPACT INVESTING  
CONFERENCE FOR  
INSTITUTIONAL  
INVESTORS

30 October  
**2024**  
NEW YORK CITY



# **UPHOLDING AGAINST HEADWINDS**

INVESTORS CONTINUE BUILDING  
AN EQUITABLE SYSTEM

## **AGENDA**

#ImpactSummitAmerica

 **PHENIX**  
CAPITAL



# UPHOLDING AGAINST HEADWINDS

INVESTORS CONTINUE BUILDING  
AN EQUITABLE SYSTEM

## WHAT'S ON THE AGENDA 2024

This is no longer about a call to action, it is about embodying the values organisations champion and continuing the flow of capital towards solutions with even bolder ambition. This demands a shift from performative gestures to genuine, sustained engagement. This new era requires investors who are not only visionaries but also stewards of the principles they uphold, creating environments where these values flourish and have a measurable impact on the world.



### Navigating Polarization

In an increasingly polarized world, political dynamics 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. Discussions may cover geopolitical risks, regulatory uncertainties, and the impact of ideological divides on market dynamics.



### Standardizing Impact Metrics

Definitions are set, the industry is now coming together to define norms, standards, and benchmarks for all the market players involved. Impact Summit America will share with the audience latest best practices, the role of industry collaborations in setting standards, and the high level of professionalism that has increased greatly in the recent years.



### Addressing Social Equity

Social issues such as inequality, discrimination, and access to basic services profoundly impact economic opportunities and investment outcomes. The conference will explore the intersection of finance and social equity, highlighting the role of investors in addressing systemic barriers and promoting inclusive prosperity. Through case studies and panel discussions, participants will explore innovative approaches to tackling social challenges while generating positive financial returns and societal impact.

# AGENDA



Chair of the day:  
LAURA WEEKS,  
Senior Responsible Investment Manager, U.S.,  
Principles for Responsible Investment (PRI)

09:00 – 09:30 Registration for the Investors - only breakfast workshop

18th floor

09:30 – 10:20

Saybrook Room, 18th floor

## Investors' breakfast workshop | Phenix Impact Investing Academy: Navigating Ethical Dilemmas in Impact Investing

Asset-owners only

*Designed specifically for executives and senior decision-makers in the impact investing industry, this workshop goes beyond the conventional focus on values-aligned portfolios to delve into the ethical complexities and strategic quandaries of adverse impacts faced by impact investors.*

*Through engaging, interactive scenario-based "what would you do" discussions, we will challenge participants to reconcile points of contention between values alignment and logic models for change while striving to optimize financial returns. We also dive into a case study to further understand the broader implications for individuals and communities, testing the delicate balance between profit maximization and ethical responsibility. This workshop is crafted to stimulate deep discussion, inspire innovative solutions, and enhance strategic decision-making in the impact investing sector.*



CAROL TARR

Head of Impact Programs &  
Collaborations  
Phenix Capital Group



KATE WALSH

Director, Training  
& Accreditation  
The GIIN



MARIE-CELINE DAMNON

Investment Associate,  
Capricorn Investment Group

09:30 – 10:30 Registration & Welcome coffee (general attendance)

18th floor

10:30 – 10:40

Plenary | Ballroom, 20th floor

## Opening remarks | Upholding against headwinds



CHANTAL HERMANS

COO  
Phenix Capital Group

10:40 – 10:50

Plenary | Ballroom, 20th floor

## Keynote speech | Diversity, Equity, and Inclusion (DEI): Commitments vs. Reality

*Frank Altman, a Forbes best-selling author, social entrepreneur, and pioneer in transforming the community development finance system, is the Founder and former CEO of Community Reinvestment Fund. In this keynote, he will examine the trajectory of Diversity, Equity, and Inclusion (DEI) commitments within the finance industry, highlighting the disparity between ambitious pledges and their actual implementation. The discussion will focus on the practical necessity of robust DEI policies for the next generation entering the job market, emphasizing the tangible benefits these policies bring to organizations. He will explore the real-world challenges and opportunities in making DEI commitments more than just a box-ticking exercise, but a driving force for meaningful change.*



FRANK ALTMAN

Forbes Author; Former President and CEO,  
Community Reinvestment Fund, USA

10:50 – 11:50

Plenary | Ballroom, 20th floor

## Investor panel I How different asset classes and investor types show resilience in their long-term investment strategy?

*In this panel discussion, the panelists discuss resilience in long-term investment strategies across asset classes and investor types, examining diversification, risk management, and adaptability in navigating market fluctuations. This discussion takes a holistic and practical approach, on how to solve such large scale issues on a systemic level.*



CYNTHIA MULLER

Director Mission Driven Investment,  
W.K. Kellogg Foundation



KUNAL DOSHI

Chief Investment Officer,  
Accelerate Investment Group



MARK HAYS

Director of Sustainable & Impact  
Investing,  
Glenmede  
*Moderator*



PEDRO HENRIQUES DA SILVA

Director  
Shifting Trillions, The Sierra  
Club Foundation



RAJITH SEBASTIAN

Head of ESG and Sustainable  
Investing,  
New York State Insurance Fund

11:50 – 12:00

Plenary | Ballroom, 20th floor

## Keynote speech | Impact Investing and the Macro-context

*A long-term horizon provides investors a powerful opportunity to incorporate an impact lens in their decision-making. What responsibilities do these investors have amid severe systemic risks such as climate change, natural resource depletion and biodiversity loss?*



PEDRO ANTONIO GUAZO ALONSO

Representative of the Secretary General for Investments and Assets  
United Nations Joint Staff Pension Fund (UNJSPF)



12:00 – 13:00 Lunch

Trumbull Room, 18th floor

13:00 – 14:00

### Breakout session A1 | InvestorConnect session #1

Breakout A1 | Ballroom, 20th floor

*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.*

### Breakout session B1 | Scaling capital for climate equity: aligning investment with Racial, Gender, and Environmental Justice

Breakout B1 | Saybrook room, 18th floor

*This breakout session will bring together expert voices to discuss strategies for achieving the Paris climate goals through the lens of equity, exploring investments, tools, and resources that support both environmental and social justice.*



**ENITH WILLIAMS**

Executive Director,  
Reparations Finance Lab



**JYOTI AGGARWALA**

Principal  
Private Capital Raise



**RICHARD ZIMMERMAN**

Partner  
WE Family Offices  
*Moderator*



**TARA ROTH**

President,  
Goldhirsh Foundation



**KAREN SUNDERAM**

Investment Strategist  
ImpactAssets Capital Partners

14:00 – 14:20 Networking Coffee Break

Trumbull Room, 18th floor

*continue on the next page >>*

14:20 – 15:20

## Breakout session A2 | InvestorConnect session #2

Breakout A2 | Ballroom, 20th floor

*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.*

## Breakout session B2 | Biodiversity: life on land and underwater

Breakout B1 Saybrook room, 18th floor

*A panel of expert will highlight their approach to biodiversity, real assets, decarbonization, and its impact on biodiversity. They will discuss the unintended consequences of the green transition, nature-based solutions, and innovative market products for investments in biodiversity.*



AMANTIA MUHEDINI

Executive Director, Sustainable & Impact Investing Strategist,  
UBS Wealth Management Chief Investment Office



PANOS SMYRNIOTIS

Foreign Affairs Specialist (IBSS contract)  
NOAA: National Oceanic & Atmospheric Administration



SUNIT SHAH

Vice President, Private Equity Partnerships,  
Blue Earth Capital



JOSH TORRES

Manager, Sustainable Finance,  
Environmental Defense Fund  
*Moderator*

15:20 – 15:40 Networking Coffee Break

Trumbull Room, 18th floor

15:40 – 16:40

Plenary | Ballroom, 20th floor

## Panel discussion | What are the right questions to ask your managers? Focus on listed equities

*Building an impact portfolio in the listed space can be more challenging when it comes to impact investing. Publicly available data is certainly an advantage but a proper investor contribution can only be attributed to proper engagement. As an asset owners, what are the questions you should be asking your manager to ensure that they are voting and engaging to the extent of your expectations?*



ALLIE BARY

Vice President,  
J.P. Morgan Development  
Finance Institution



ANDREW BEHAR

CEO,  
As You Sow



DAVID ROWLETT

Portfolio Manager U.S.  
Impact Equity,  
T. Rowe Price



EVALINDE EELENS,  
MBA, MSC, FRM, CAIA,

Professional Board Member  
Pension Funds



BETH COLLINS

Managing Director, Impact Investing,  
Catholic Relief Services  
*Moderator*

16:40 – 17:00

Plenary | Ballroom, 20th floor

## Case study | Endowments Impact Benchmarks

*The Endowment Impact Benchmark (EIB) is an assessment and ratings framework that enables endowments to earn recognition for their commitment to sustainable and impact investing*



**GEORGES DYER**

Co-founder and Executive Director,  
Intentional Endowments Network & the Crane  
Institute of Sustainability



**PEDRO HENRIQUES DA SILVA**

Director  
Shifting Trillions, The Sierra Club Foundation

17:00 – 17:20

Plenary | Ballroom, 20th floor

## Case study | Conducting thorough due diligence throughout the manager selection process

*What is the selection process of an external manager? The case study will go over the extensive due diligence done on the impact capabilities of the shortlisted candidates, and go over the impact selection criteria used. The presentation will also showcase the specific arrangements made in terms of impact measurement and reporting with specific examples of loans provided to companies/projects and the instruments used to make an impact (KPI's, covenants, engagement, and more). The case study will be followed by a Q&A with the audience*



**ANDER IRURETAGOYENA**

Vice President- Funds & Co-Investments  
The Impact Engine

17:20 – 18:30 Closing reception drinks

Ballroom, 20th floor

### THIS AGENDA WAS CREATED WITH THE INPUT FROM:

- Mike McCreless, Executive Director, Impact Frontiers
- Pedro Henriques da Silva, Director, Shifting Trillions, Sierra Club Foundation
- Ryan Malloy, Research Analyst, Sustainable Investing, Fiduciary Trust
- Tom Achoki, M.D., Ph.D., FACHE, Senior Director of Strategy and Impact, AB INBEV FOUNDATION
- Tyler Blickhan, CFA, CAIA, Associate Director of Investments, Ascension Investment Management



## ABOUT IMPACT SUMMIT AMERICA

Impact Summit America is a highly curated institutional investor conference that annually brings together thought leaders and practitioners in the impact investing space. The conference aims to catalyse institutional capital to support the most ambitious environmental goals promoting sustainable investing that goes hand-in-hand with market-competitive financial returns. This conference will share 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 for a meaningful dialogue at the 5th Impact Summit America in New York City

## WHO WILL ATTEND

This event is catered to C-Suite, Board Members, Senior Portfolio Managers, ESG/Impact Investing officers, Allocators, and Fund Selectors of:

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

## REGISTER



## ASSET OWNERS MAY APPLY FOR COMPLIMENTARY TICKETS

Have additional questions? Please contact our institutional investor relationship manager:

**Tom Alker** [tomalker@phenixcapitalgroup.com](mailto:tomalker@phenixcapitalgroup.com).

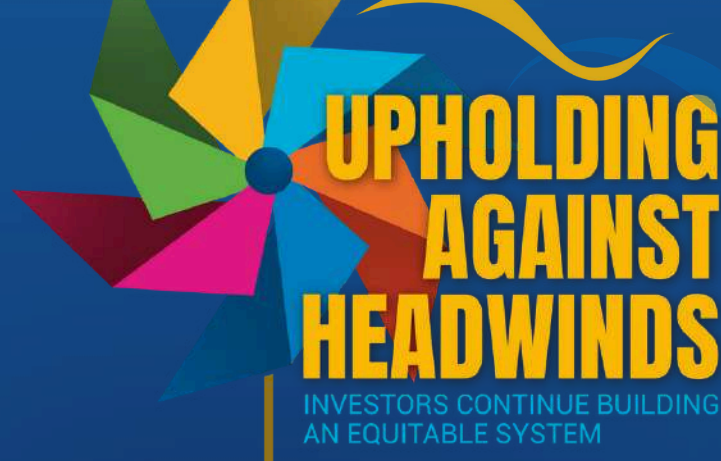




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