

CANADA | 18 June 2025 | Montreal

IMPACT SEMINAR SERIES

IMPACT INVESTING EVENT FOR
INSTITUTIONAL INVESTORS &
ASSET OWNERS



The Impact Seminar Series – Canada is tailored to institutional investors and asset owners based in Canada. Impact Seminar Series focuses on the opportunities to move beyond ESG to invest with impact while ensuring market-competitive financial returns.

A one-day programme aims to empower investors to move from the theory to the practice of impact investing through in-depth panel discussions by experienced impact investors and impact practitioners. During the thematic roundtable session, investors can explore a select group of impact themes to participate in in-depth discussions on the most prevalent impact themes.

THE AGENDA WAS CREATED WITH INPUT FROM:

- **Aysha Dawood**, Coordinator, Canada Forum for Impact Investment and Development (CAFIID)
- **Claire Bisson**, Vice-President and Chief Investment Officer, Fondation
- **Graham Singh**, Chief Executive Officer, Relèven
- **Karolina Iaydjieva**, Portfolio Manager, Rally Assets
- **Lilya Mincheva**, Interim Co-Head, North America RI Ecosystems, Principles for Responsible Investment
- **Lindsay Wallace**, Senior Vice President, MEDA (Mennonite Economic Development Associates)
- **Mari Brossard**, Principal Sustainability, Sagard
- **Rosalie Vendette**, Director, Quinn+Partners
- **Temple Fennell**, Principal, Keller Family Office
- **Yashel Oliva**, Senior Associate, Public Policy & Partnerships, FinDev Canada

AND WITH THE SUPPORT FROM



HOSTED BY:



AGENDA

Heure / Time	Description des sessions / Session description
8:30-9:00	Inscription / Registration
9:00-10:00	<p>Breakfast workshop Employee Ownership: Investing in Shared Prosperity</p> <p><i>With trillions in business assets expected to change hands in the coming decade, employee ownership offers a timely opportunity for investors to drive long-term value while strengthening communities. This workshop explores how emerging models - like Canada's new Employee Ownership Trusts (EOTs) - can preserve local businesses, deliver competitive returns, and create more inclusive economies. Learn how forward-thinking investors are financing ownership transitions and why this growing movement is gaining bipartisan support as a practical solution to wealth inequality, business continuity, and economic sovereignty.</i></p> <p><u>Speakers:</u></p>
10:00-10:40	<p>Round table IMM for social impact, stakeholder buy-in, and standardization</p> <p><i>What does meaningful impact measurement look like in real-world investment decisions? This panel explores emerging methodologies, stakeholder engagement, and the path toward standardizing IMM practices in Canada. Stakeholder buy-in starts with shared language. This session explores the tension between measurement rigor and community relevance in developing IMM systems that work for everyone.</i></p> <p><u>Speakers:</u></p>
10:40-10:55	Pause café / Coffee Break
10:55-12:00	<p>Thematic Roundtable Discussions</p> <p><i>Following a brief introduction by the Phenix Capital Group team, participants will engage in a series of facilitated roundtable discussions. Each table will be led by two subject-matter experts and will focus on one of the thematic areas outlined below. Each discussion will last for 30 minutes, with participants rotating through three different themes during the session. This format is designed to foster in-depth dialogue and the exchange of diverse perspectives.</i></p> <p><i>Discussion themes:</i></p> <p>here</p> <ul style="list-style-type: none">• Agriculture & land• Blended finance• Energy transition

12:00-13:00 **Dîner / Lunch**

13:00-13:20 **Interactive session | Investing with integrity: indigenous due diligence in practice**

Investing in Indigenous communities means rethinking how we assess risk, value, and readiness. This topic breaks down the steps investors can take to engage Indigenous communities effectively—from legal considerations to community consultation. This session provides a candid look at what works and what doesn't when investing in Indigenous-led projects. Gain insight into governance, trust-building, and how to align capital with community priorities.

[Speakers:](#)

13:20-14:10 **Investor Panel | Geopolitics, resilience & the power of private markets**

Amid trade disruptions, shifting regulations, and political volatility, impact investors must future-proof their portfolios and partnerships. This session tackles how global shape capital flows and risk perception. We'll also examine the rising role of private markets in maintaining impact integrity and building long-term resilience in deals, especially within infrastructure, climate, and gender-lens investing. Learn how Canadian institutions can stay agile, relevant, and resilient

[Speakers:](#)

[Moderator](#)

14:10-14:25 **Pause café / Coffee Break**

14:25-15:00 **Fireside Chat | De-risking emerging markets**

For decades, perceived high risk has constrained private capital flows to emerging markets. This discussion will challenge conventional wisdom, highlighting how outdated assumptions can inflate perceived risks and create missed opportunities. It will explore how institutional investors can leverage data-driven insights to redefine risk and unlock emerging market potential

[Speakers:](#)

[here](#)

15:00-16:00

Clôture et réseautage / Closing & Networking

FOR WHOM

This event is catered for C-Suite, Board Members, Portfolio Managers, ESG/Impact Investing officers & their teams 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.

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COMPLIMENTARY tickets for institutional investors & asset owners

