

CharityFinance 
RESPONSIBLE
INVESTMENT CONFERENCE
ESG & IMPACT INVESTING

17 September 2020
America Square, London

Topics include:

- Aligning investments with your charity's mission
- Creating a robust ESG investment policy
- Setting benchmarks and improving transparency
- When to engage and when to divest

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I am pleased to launch our first Charity Finance Responsible Investment Conference. There is a growing expectation, and desire, for charities to hold investments that align with their cause, and do not unintentionally cause damage to other areas of society. However, it can be a difficult marketplace to navigate. This event will equip you with the tools to better understand how to adopt a responsible investment strategy and the available range of offerings and approaches.

Tristan Blythe, editor, *Charity Finance*

Programme

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| 08:45 | Registration, refreshments, networking and time to visit exhibition | |
| 09:15 | Welcome from Tristan Blythe , editor, <i>Charity Finance</i> | |
| 09:20 | Keynote Address: Aligning investments with a charity's mission | |
| | Guy's and St Thomas' Charity applies its resources, including £900m endowment assets, to support urban health projects in South London and beyond. The charity manages its assets to generate competitive financial returns whilst following a responsible investing policy. More recently, the charity has been using capital from its endowment to make impact investments. By taking a bold step into this space, the charity also hopes to encourage others to embrace ESG and impact considerations in their investment approach. In seeking health impact funds, the charity considers a broad array of sectors which include not only life sciences and healthcare delivery but also the social determinants of health such as housing, education, employment and environmental health. | |
| | During her keynote address, Anita will discuss: | |
| | <ul style="list-style-type: none"> • Developing an active and engaged approach to ESG and impact investing • Putting ESG at the heart of the investment process • Adopting a sustainable approach without compromising returns • Engaging with companies to improve their ESG and impact performance • Pushing for corporate reform and engaging actively for change | |
| | Anita Bhatia , investment director, endowment team, Guy's and St Thomas' Charity | |
| 10:00 | Panel Discussion: Creating a robust ESG investment policy | |
| | <ul style="list-style-type: none"> • Demonstrating that you're meeting governance responsibilities • Providing a framework for investment decisions • Clarifying investment aims to reflect the charity's values • Choosing between negative screening and engagement • Working effectively with trustees and stakeholders | |
| | Alma Adade , financial controller, Merton College | |
| | Charlie Willans , investment officer, Esmée Fairbairn Foundation | |
| | Dr Xi Li , associate professor of accounting, London School of Economics, research fellow, Centre for Endowment Asset Management, Cambridge Judge Business School | |
| | Soji Otudeko , head of financial accounting, The Salvation Army UK | |
| 10:40 | Refreshment break and networking | |
| 11:15 | 1A. Using shareholder power to influence change and push for progress | 1B. 50 Shades of Green: Assessing the real impact of ESG policy |
| | This session will highlight some of the ways your charity can go further than sustainability, and how your organisation can invest with impact. As sustainable | This session aims to explain what ESG actually means, how this is both financially and socially relevant in the context of charity investments, the different shades of responsible |

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| 11:15 cont. | investment continues to evolve Cazenove is helping an increasing number of charities maximise the impact of their investments, Kate will discuss: <ul style="list-style-type: none"> • Examining how large charities can make a positive societal impact with their investments • Making the most of your charity's assets • Collaborating with other investors to raise the market standard on ESG issues • Increasing transparency to encourage companies to improve their ESG scores | investment available and importantly, how to assess the real impact of ESG policy. Of course, it is not all about the environment. The presentation will tackle: <ul style="list-style-type: none"> • Identifying ESG assessment tools available to investment managers • Ensuring that your voice is heard when it comes to the key issues of our time • Creating framework to consider ESG risks for a charity • Assessing your investment managers to ensure they are doing the most on your behalf |
| | Kate Rogers , co-head of charities, Cazenove Capital | Nancy Kilpatrick , head of charities, Legal & General Investment Management |
| 12:00 | 2A. Environmental change is one of the great issues of our time, but how will it affect the investment world? | 2B. What is a charity's responsibility to be responsible? |
| | This presentation explores how climate change is helping to fundamentally reshape global political economy, as well as highlighting some of the challenges and opportunities investors face in the coming decades. | In addressing this question, Neville will consider both the regulatory landscape and requirements expected of charities, but also how the adoption of a holistic approach can ensure a charity's aims are being fulfilled, not only through grants and projects, but directly through a well-aligned investment portfolio. |
| | Edward Donati , investment manager, Ruffer | Neville White , head of responsible investment, EdenTree Investment Management |
| 12:40 | Lunch, networking and time to visit the exhibition | |
| 13:50 | Setting benchmarks and improving transparency | |
| | Identifying the hallmarks of sustainable development. How will climate change risk impact financial returns? | |
| | James Brooke Turner , investment director, The Nuffield Foundation | |
| 14:30 | Refreshment break and networking | |
| 15:00 | Case Study: Impact Investing | |
| | How Access, The Foundation for Social Change has implemented Impact Investing | |
| | Chris Coghlan , director of finance and operations, Access, The Foundation for Social Investment | |
| 15:40 | Closing Keynote: Examining when to engage and when to divest | |
| | <ul style="list-style-type: none"> • Ethical, responsible and sustainable investment to enhance returns • Keeping investment consistent with the trust/charity's purpose • Divesting from activities which undermine objectives • Investment strategy to promote benefit to society • Knowing what to ask your investment manager | |
| | Sian Ferguson , trust executive, Ashden Trust, JJ Charitable Trust and Mark Leonard Trust | |
| 16:20 | Chair's closing remarks | |
| 16:30 | Networking drinks reception | |

QUICK REGISTRATION

| | Early-release tickets (before 17 July) | General release tickets (before 14 August) | Final release tickets (after 14 August) |
|--|---|---|--|
| Charity delegate | £99 (exc VAT) | £169 (exc VAT) | £249 (exc VAT) |
| Charity Team ticket (up to 4 team members) | £249 (exc VAT) | £460 (exc VAT) | £649 (exc VAT) |

| Delegate name (inc title) | Position | Email | Your sessions (write letter A-B) in box provided |
|---------------------------|----------|-------|--|
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