

# Agenda

## 0900-0930 – REGISTRATION

inc. refreshments

## 0930-0940 – Welcome and introduction

**Speaker:** Gavin Francis | *Founder and Director, Worthstone*

## 0940-1000 – Keynote

**Speaker:** Katherine Brown | *Head of Sustainable and Impact Investing Initiatives, World Economic Forum*

## 1000-1015 – Alternative keynote

**1015-1030 – Bringing ‘impact’ to life**  
Prioritising impact as a key outcome from a portfolio sounds laudable, but how do we measure whether or not goals have been and are being achieved, and, of equal importance, how do we then report outcomes to investors. **In this session we will be introduced to the methodology employed by one of the early adopters of impact measurement and reporting,** thereby helping us to appreciate the perspective of a fund manager when they are engaging with companies to hold them to account for their impact “claims.”

**Speaker:** George Latham | *Managing Partner, Listed Equity, WHEB*

## 1030-1040 – Adviser resources

**Speaker:** Gavin Francis | *Founder and Director, Worthstone*

## 1040-1110 – Sharing best practice - Impact Awards

Awards will be presented along with the independent judging panel presenting their findings and highlighting exemplars of best practice. The Impact Awards celebrate best practice in the retail impact investment sector by recognising those who are leading the market in aligning retail investment strategies to achieve positive social and financial outcomes.

**Awards presented by** Elizabeth Corley, CBE | *Chair, PM-endorsed Implementation Taskforce for Social Impact Investment*

## 1110-1140 – MID MORNING COFFEE

## 1140-1155 – Sharing adviser firm best practice

**This session is presented by the Impact Award recipient for Financial Advisory Firm and focuses on sharing the best practice which they have developed in social impact products and/or integrating an impact investment client offering into their policies and procedures.**

**Speaker:** *Financial Advisory Firm recipient from Impact Awards 2018*

## 1155-1240 – What’s in a name? – Panel discussion and audience Q&A

Impact, ESG, SRI, Sustainability, Ethical: aren’t these just different ways of saying the same thing? If not, how do they differ, and, more importantly, how does each approach measure up for the client who wants their wealth to generate positive social outcomes as well as financial returns? **The aim of this panel session is to enable us to better evaluate the relative effectiveness of each investment style by exploring the nuances and comparing and contrasting the various approaches.**

### Speakers:

Henry Boucher | *Deputy Chief Investment Officer, Sarasin and Partners*

Ben Constable-Maxwell | *Director of Corporate Finance and Stewardship, M&G Investments*

Ed Heaven | *Responsible Investments, Montanaro*

Abigail Rotheroe | *Head of Impact, Project Snowball LLP*

## 1240-1300 – Carving out a new path – adviser case study

A Certified Financial Planner who wanted to find a pathway for willing clients to allocate some of their wealth to social impact investment that aligned with his overall philosophy on evidence-based investment. This is his story so far...

**Speakers:** David Crozier | *Navigator Financial Planning with Carl, Graduate of Bristol Together*



Networking will be held in The Conduit's cellar space - The Speakeasy.

All speaker-led content will take place on the 1st floor.

## 1300-1400 – LUNCH

## 1400-1415 – Can investors have their cake and eat it too?

Some might say that to generate financial returns in addition to generating impact from the public markets is to dream the impossible dream. Others might even dare to suggest that “Impact” is the future of investing. **This presentation examines the rigorous academic evidence which demonstrates the significant long-term outperformance of emerging sustainable organisations and highlights the fundamental innovations needed for an organisation to be regarded as “sustainable”.** Also we consider the links between corporate sustainability and capital markets as they pertain to investment analyst recommendations, and more broadly, as they relate to the realisation of value in public equity markets through a commitment to sustainability.

**Speaker:** Ioannis Ioannou | *Associate Professor of Strategy and Entrepreneurship, London Business School*

## BREAKOUTS – 1420-1555

Delegates will be divided into four groups which rotate through each workshop below.

## Breakout 1 – Value and values investing – Adviser led session

Can you construct risk adjusted asset class portfolios, which also generate impact returns? And if so, can highly focused impact solutions be integrated into an existing “evidence based” investment process, which uses diversified passive strategies to deliver reliable financial outcomes; or is a completely new philosophy and process needed? **In this session one Accredited Financial Planning Firm shares their exploration of these questions, their challenges, where they are on their journey, and solution they are offering their clients.**

**Speakers:** Nick Millar, Dasha Orlova & Heather Rickaby | *Ashburn Wealth Management*

## Breakout 2 – UN Sustainable Development Goals – what are they and why do they matter to investors?

The UN Sustainable Development Goals (SDGs) have become increasingly important for companies and investors alike. They are seen as a long-term roadmap for solving many of the pressing social and environmental problems the global community are facing.

- Why are the SDGs so important and how do we build them into our investment framework?
- How can they enhance shareholder returns? And what are the risks?

**In this session we will explore the UN SDGs and understand why they are so important for the adviser community.**

**Speaker:** David Harrison | *Fund Manager, Rathbones*

## Breakout 3 – Learning from experience

Does impact investment *really* make a difference? What are the on-the-ground challenges and questions an adviser faces in explaining, monitoring and reporting on impact and how might these be overcome? This session will allow an asset manager to explain their approach to product design. **It will also encourage dialogue with and between advisers, so that we can learn from each other about how best to deal with clients who wish to explore options for impact investment.**

**Speaker:** Ryan Smith | *Head of ESG Research, Kames*

## Breakout 4 – Sharing adviser best practice

This session is presented by the Impact Award recipient for Individual Financial Adviser and focuses on how they have embraced social impact within their client offering. **It will examine strategies for developing the conversation with the client by exploring how an adviser can best prepare to open up the subject of impact.**

**Speaker:** *Individual Financial Adviser recipient from Impact Awards 2018*

## 1600-1800 – NETWORKING DRINKS

inc. **Closing statement** from Gavin Francis