

3rd Annual ESG Summit

AGENDA

April 6, 7 & 8, 2021 | 11:30AM - 1:00PM ET

April 6 WEBCAST 1

11:30 AM WELCOME & INTRODUCTION

- **Julie Dellinger, CFA**, CFA Society Washington, DC Board Chairman

11:35 AM KEYNOTE SPEAKER

- **Jeremy Grantham**, Co-Founder, Grantham, Mayo and van Otterloo (GMO) **in conversation with Gillian Tett**, Chair of the Editorial Board and Editor-at-Large, US, Financial Times

12:00 PM PANEL: THE FUTURE OF ESG

Speakers:

- **Stephanie Cohn Rupp**, Principal & CEO, Veris Wealth Partners
- **Lauren Smart**, Chief Commercial Officer, ESG, S&P Global
- **Kevin Walsh**, Principal, Groom Law Group

Moderator: **Sonja Gibbs, CFA**, Managing Director and Head of Sustainable Finance, Global Policy Initiatives, Institute of International Finance

April 7 WEBCAST 2

11:30 AM WELCOME

11:32 AM KEYNOTE SPEAKER

- **Mary-Catherine Lader**, Head of Aladdin Sustainability, BlackRock **in conversation with Matthew Malone, CFA**, Managing Director, Real Estate, FS Investments

12:00 PM PANEL: ESG INVESTMENT STRATEGIES & ASSET SELECTION

Speakers:

- **Nathalie Wallace**, Head of ESG Strategy and Development, Mirova US LLC
- **Jonathan Bailey**, Managing Director, Head of ESG Investing, Neuberger Berman
- **Hannah Skeates**, Co-head of Sustainable Investing, Wells Fargo Asset Management

Moderator: **Libby Bernick**, CEO, Impact Cubed

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AGENDA

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April 8	WEBCAST 3
11:30 AM	WELCOME
11:32 AM	KEYNOTE SPEAKER: <ul style="list-style-type: none">• Audrey Choi, Chief Marketing Officer and Chief Sustainability Officer, Morgan Stanley in conversation with Gillian Tett, Chair of the Editorial Board and Editor-at-Large, US, Financial Times
12:00 PM	CLOSING REMARKS <ul style="list-style-type: none">• Bill Scott, CAE, CEO, CFA Society Washington, DC
12:02 PM	BREAK
12:10 PM	ROUNDTABLE SESSIONS Developing on ESG Disclosure <ul style="list-style-type: none">• Facilitated by John Streur, Calvert & Katie Schmitz Eulitt, SASB ESG Certificate, Skills and Knowledge <ul style="list-style-type: none">• Facilitated by Will Goodhart, CFA UK ESG in the US: 2025 <ul style="list-style-type: none">• Facilitated by Gabriel Thoumi, CFA, Planet Tracker