

ESG in Manager Selection 2016

Investment mandates and
long-term value creation

12th October 2016, Grange St Paul's Hotel, London

Agenda

Wednesday, 12th October

8.30 – 9.00	Registration and Refreshments
9.00 – 9.05	RI Welcome Banu Tuyakbayeva, Events Leader, Responsible Investor
9.05 – 10.00	<p>Plenary 1: Client servicing</p> <p>With mounting pressure on fees, new reporting requirements, demands for increasingly complex portfolio-level information and requests for direct access to investment professionals, client servicing is becoming a key factor during manager selection. How can asset managers fulfill client expectations and deliver value for money? What does best practice look like?</p> <p>Moderator: Hugh Wheelan, Managing Editor, Responsible Investor Speakers: Richard Butcher, Managing Director, PTL Christopher Sier, Professor of Practice, Newcastle University Business School</p>
10.00 – 11.10	<p>Plenary 2: Out of many, eight.</p> <p>What LGPS asset pooling means for manager selection, and how investment houses will be judged on costs, transparency and sustainability.</p> <p>ESG policy development at the 8x £13-33bn UK regional wealth funds that are merging local authority pension assets.</p> <p>Moderator: Dawn Turner, Chief Pensions Officer, Environment Agency Pension Fund Speakers: Jill Davys, Assistant Director, Client Management, London CIV Jane Firth, Principal Investment Manager, South Yorkshire Pension Fund Richard Savage, Investment Manager, Global Equities, Local</p>



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	<p>Pensions Partnership Owen Thorne, Investment Officer, Merseyside Pension Fund Faith Ward, Chief Responsible Investment and Risk Officer, Environment Agency Pension Fund</p>
11.10 – 11.40	Morning Refreshment Break
11.40 – 12.30	<p>Plenary 3: Let's hear from the hirers! Fiduciary managers talk about how they select asset managers</p> <p>Case studies on integrating ESG into funds platforms</p> <p>Moderator: Hugh Wheelan, Managing Editor, Responsible Investor Speakers: Adam Smears, Head of Fixed Income Manager Research, Russell Investments Theo Nijssen, Head of Multi-Management Team, Kempen Capital Management</p>
12.30 – 13.40	Networking Lunch
13.40 – 14.35	<p>Plenary 4: A family affair: the family office ESG fund manager selection process</p> <p>Do family/HNW offices hire managers differently, and how? How important are ESG factors when selecting managers and why? How does the above translate into selection criteria and subsequent long-term business relationships?</p> <p>Moderator: Howard Pearce, Executive Director, HowESG Speakers: Ahmet Feridun, Senior Associate, Stonehage Fleming Investment Management Ivo Knoepfel, Founder and Managing Director, onValues Bonny Landers, Head of Sustainable, Responsible and Impact Investment, Sandaire Investment Office</p>
14.35 – 15.25	<p>Plenary 5: Selecting the selectors Investment committees rely heavily on advice from consultants and fiduciary managers when selecting asset managers but “quis custodiet ipsos custodes”?</p>

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	<p>There is increasing regulatory and client-driven demand for greater transparency in manager selection. Is the process of hiring asset managers and fiduciary managers sufficiently transparent and are there conflicts of interest when an advisor offers both investment consulting and fiduciary management? How can asset owners measure their advisors' performance and objectivity?</p> <p>Moderator: Daniel Brooksbank, Editor, Responsible Investor Speakers: Tim Giles, Senior Partner, Aon Hewitt Bill Trythall, Committee member, AMNT and Pensioner Director, USS</p>
15.25 – 15.45	Networking break
15.45 – 16.05	<p>Responsible Investing - firing the revolution. What are the actions?</p> <p>Daniel Godfrey, Independent Director, Big Issue Invest</p>
16.05 – 17.00	<p>Plenary 6: A new dawn for RFPs?</p> <p>Long-term value creation via extended term sustainable investment mandates.</p> <p>Moderator: Rob Lake, Principal, Rob Lake Advisors Speakers: Howard Sherman, Executive Director, MSCI ESG Research Jens-Christian Stougaard, Director, PensionDanmark Lars Meuller, Senior Portfolio Manager, Investment Partnerships, Canada Pension Plan Investment Board</p>
17.00 – 19.00	Drinks reception on upper level