

ESTABLISHING THE ASSET MANAGER VOICE IN ESG

MARCH 12 • WASHINGTON DC

10:00-10:30 AM	Registration & Networking
10:30-11:30 AM	Mission & Structure Bonnie Saynay, Founder — Global ESG Advisors
11:30 AM-12:30 PM	Lunch
12:30-1:15 PM	ESG Asset Manager Challenges Regulation S-K on Climate related disclosure, EU Taxonomy and implications for multi-national asset management firms, Shareholder Rights Directive (SRD), TCFD and PRI reporting frameworks, SASB and materiality positions, disclosure policies, active ownership impact, investment stewardship reporting platforms, ESG research and third party ratings, Policy positions with ICI/SEC, Uniform standards for ESG definitions and applicability to product development and governance.
1:15-2:00 PM	Target Actions & Next Steps Uniform voice on controversial ESG topics to industry and media. Discussion of RRT (Rapid response team) framework to address negative and misinformation in marketplace. Robust approach to ESG education and the ability to drive policy discussions within the ICI and SEC. Serve as a conduit to further enhance asset manager positions in ESG.
2:00-2:15 PM	Break
2:15-3:00 PM	Partner Organizations Define engagement protocol with partner organizations in go-forward structure, policy and planning.
3:00 PM	Adjourn