



ESG INTEGRATION FORUM – US

Develop an integrated response to ESG expectations

Thursday, December 1, 2022 – Friday, December 2, 2022

In-person event: etc.venues 360 Madison Avenue, New York

AGENDA DAY ONE – DECEMBER 1

8.30 am **Registration and networking**

9.00 am **Welcome to the ESG Integration Forum – US**

Laurence Taylor, senior conference producer, *IR Magazine* and Corporate Secretary

9.10 am **Keynote panel: High-level ESG priorities for 2023**

- Reflecting on the key ESG priorities for investors as we approach 2023
- Turning ESG goals into strategies and policies into practice
- Understanding the impact of the current regulatory and market environment on ESG priorities across the US

Moderator: Laurence Taylor, senior conference producer, *IR Magazine* and Corporate Secretary
Sarah Hughes, head of ESG and sustainable investing, American Century Investments

10.00 am **Navigating new domestic and international regulations: What should you be doing now?**

- An update on the status of the SEC climate proposals and the impact they are likely to have on IR, governance and sustainability teams
- Learn how to prepare from companies leading the way in transparent climate reporting
- Preparing for future regulations: what are the SEC's priorities for 2023, and how can companies think strategically for the year ahead?
- How will changing regulations abroad (CSRD, EU Taxonomy and more) impact US companies?

Moderator: Ben Maiden, editor-at-large, Corporate Secretary
Chris Fenwick, head of ESG center of excellence, OneTrust
John Miller, director of ESG and sustainability policy, Cowen
Curtis Ravenel, founding member, FSB TCFD Secretariat

10.45 am **Morning break**

11.15 am **Is the ESG backlash a significant challenge for public companies?**

As the ESG movement gains momentum, so does its counter-movement. In this session, our speakers will discuss the impact this trend is likely to have on IR and governance teams at public companies.

Moderator: Steve Wade, head of event content, *IR Magazine* and Corporate Secretary
Chad Reed, VP of strategic initiatives and ESG, Hannon Armstrong



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Benjamin Martin, vice president of ESG, Solebury Strategic Communications

11.45 am **Defining, redefining and measuring material ESG issues**

- Identifying which ESG issues are most material to your business and how the current market environment impacts these
- Continuously assessing the materiality of ESG issues as stakeholder demands evolve
- Collecting and assessing robust and reliable data on these issues and implementing processes to help streamline data collection

Moderator: Laurence Taylor, senior conference producer, *IR Magazine & Corporate Secretary*

Frank Kelley, director of ESG, DFIN Solutions

Zach Rothberg, head of investor relations sales, AlphaSense

12.30 pm **Lunch**

1.30 pm **Sending the right message: trends in ESG communicating and reporting**

- An update on the latest requirements for ESG-related disclosures in the short, medium and long term
- Ensuring ESG information is reported in a transparent, standardized and machine-ready way
- Avoiding accusations of greenwashing and ensuring your statements stand up to third-party scrutiny
- Ensuring your ESG messaging is consistent across your organization

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*

Wesley Gee, chief sustainability officer, Works Design

John Nunziati, investor relations partner, Q4

Aaron Chew, VP of investor relations, Proterra

2.15 pm **Taking a top-down approach to ESG: Getting senior management and the board on board**

- Discussing the best government structures and sub-committees to ensure effective ESG leadership
- Securing team commitment to ESG goals and promoting cross-departmental working
- Learn what investors are asking for when it comes to board composition

Moderator: Ben Maiden, editor-at-large, *Corporate Secretary*

Colin Etnire, head of ESG, Navex

Matthew Abenante, director of investor relations, Lightbridge

Jeffrey M. Taylor, VP, chief SEC counsel and secretary, American Water Works Company

3.00 pm **Afternoon break**



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3.15 pm Champagne roundtables: Exchange ideas with your peers in sector-specific discussions

How the roundtables work:

- Choose any of the following topics – the power is in your hands!
- Join the relevant roundtable and discuss with your peers
- When the bell rings, move on to your following table and repeat!
- Enjoy a glass of champagne or a non-alcoholic beverage
- At the end of the session, hear a roundup of lessons learned so you can apply these when you return to the office

Roundtable topics to be confirmed

4.15 pm Closing remarks and networking drinks

Ben Maiden, editor-at-large, Corporate Secretary

AGENDA DAY TWO – DECEMBER 2

8.30 am Registration and networking

9.00 am Welcome to day two

Ben Maiden, editor-at-large, Corporate Secretary

9.10 am Focusing on G: Taking a stand on sensitive political issues

- Talking politics in 2023 and balancing different stakeholder perspectives
- Assessing the risks associated with taking a political stance
- Other emerging governance threats for investors in 2023: cyber-security, executive pay and geopolitical risk

Moderator: Ben Maiden, editor-at-large, Corporate Secretary

Joshua Black, editor-in-chief, Insightia, a Diligent brand

Alexandra Higgins, managing director, Okapi Partners

10.00 am Taking a holistic approach to environmental issues: Climate, biodiversity and supply chain impacts

- Bringing the conversation up to date on climate change: new targets and measuring progress
- Advancing the discussion around biodiversity issues and integrating nature into your decision making



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- Understanding the relationship between climate and nature and what it means for public companies

Moderator: Laurence Taylor, senior conference producer, *IR Magazine* and Corporate Secretary
Raechelle Munna, assistant corporate secretary, Entergy

10.45 am Morning break

11.15 am Spotlight on ‘S’: Tackling and reporting social issues effectively

- Learn which social issues are front of mind for investors as we approach 2023
- Hear how other companies are improving employee engagement in the context of rising living costs and remote working
- Assessing the benefits of racial equity and civil rights audits to drive progress on social issues

Moderator: Ben Maiden, editor-at-large, Corporate Secretary
Leahruth Jemilo, VP and head of ESG practice, Corbin advisors
Sofia Dolores Martos, partner, ESG & Impact, Kirkland and Ellis
Scott Powell, VP of investor relations, VolitionRx, and CFO, Volition America

12.30 pm The evolving role of ESG ratings agencies and how to improve your ESG score

- Understand how ESG ratings agencies are changing and how to give yourself the best chance of achieving better scores in 2023
- Responding to and prioritizing surveys given limited time and resources
- How do investors integrate ESG ratings into their investment decisions?

Moderator: Laurence Taylor, senior conference producer, *IR Magazine* and Corporate Secretary
Emmanuelle Palikuca, managing director and head of sustainability advisory, Alliance Advisors
Alexandra Rodrigues, lead ESG advisor and senior specialist, Nasdaq

12.45 pm Lunch

2.00 pm Investor Q&A: How are shareholder needs changing concerning ESG?

- Preparing for shareholder meetings in 2023: what ESG topics are investors focussing on?
- Evaluating the benefits of ESG roadshows and how to execute them well
- Understanding how shareholders integrate ESG ratings into their investment decisions
- Engagement vs divestment: investor approaches to ESG in a bearish market

2.45 pm Closing keynote perspective: Making ESG a strategic priority

Moderator: Steve Wade, head of event content, *IR Magazine* & Corporate Secretary
Jennifer Motles, chief sustainability officer, PMI



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3.15 pm **End of conference**