



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**

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

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

9.30 am **Fire-side chat: 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 Bratton 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, ESG policy analyst, Cowen
Curtis Ravenel, founding member, FSB TCFD Secretariat*

10.45 am **Morning break**



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

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
[Benjamin Martin](#), vice president of ESG, Solebury Strategic Communications
[Chad Reed](#), VP of strategic initiatives and ESG, Hannon Armstrong

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
[Zach Rothberg](#), head of investor relations sales, AlphaSense
[Alison Sternberg](#), senior vice president investor relations, fuboTV

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*
[Aaron Chew](#), vice president of investor relations, Proterra
[Wesley Gee](#), chief sustainability officer, Works Design
[John Nunziati](#), investor relations partner, Q4

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

- Discussing the best governance 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



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

Moderator: Ben Maiden, editor-at-large, Corporate Secretary
Matthew Abenante, director of investor relations, Lightbridge Corporation
Colin Etnire, head of ESG, BC Partners
Jeffrey Taylor, VP, chief SEC counsel and secretary, American Water

3.00 pm **Afternoon break**

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:

- Managing the energy transition and measuring progress effectively
- Getting started with your ESG journey
- Progressing ESG across the industrial supply chain: navigating geopolitical and commodity price impacts
- Human capital management in 2023: remote working, wage inflation and the great resignation
- Protecting customer privacy and mitigating against data security risks

Ben Maiden, editor-at-large, Corporate Secretary
Karen Shulman, senior manager, sustainability, Albermarle
Laurence Taylor, senior conference producer, *IR Magazine* & Corporate Secretary
Steve Wade, head of event content, *IR Magazine* & Corporate Secretary

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



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

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 governance**

- 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
- 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
Jeffrey Taylor, VP, chief SEC counsel and secretary, American Water

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 Martos, partner, ESG & Impact, Kirkland and Ellis
Scott Powell, VP of investor relations, VolitionRx, and CFO, Volition America

12.00 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?



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

Moderator: Laurence Taylor, senior conference producer, *IR Magazine* and Corporate Secretary
Keri Mattox, chief communications and administration officer, Zimmer Biomet
Emmanuelle Palikuca, managing director and head of sustainability advisory, Alliance Advisors
Ally 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

Moderator: Steve Wade, head of event content, *IR Magazine* & Corporate Secretary
Laura Kane, head of ESG research, Voya Investment Management
Fionna Ross, sustainability investment specialist & head of the sustainability institute, Americas, abrdn

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

3.15 pm **Closing remarks and end of conference**

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