

Responsible Investing Symposium - April 8, 2014

Time	Session	Speakers
7:45 AM - 8:15 AM	Breakfast	
8:15 AM - 9:00 AM	<p>Introductory Remarks: Northern Trust Corporate Social Responsibility Strategy Corporate social responsibility, or CSR, is a growing area that continues to evolve from a novel idea to an imperative for global success. It spans environmental, social and governance issues and impacts business strategy, clients, employees, and shareholders globally. Bridging and balancing the social contract and economic impact are at the heart of a successful CSR strategy. <i>Topics to be covered:</i> industry trends, defining success and Northern Trust's approach to CSR</p>	Connie Lindsey, Northern Trust
	<p>Introductory Remarks: Northern Trust Asset Management and Responsible Investing Responsible investing is an important and growing area within the asset management industry that is defined as dually emphasizing social and economic benefits. As global asset management firms continue to articulate and seek an appropriate balance of risk and return, intellectual capital, integrity, and innovation will define those who are able to best advise clients in achieving their objectives. <i>Topics to be covered:</i> Northern Trust's commitment to responsible investing</p>	Alan Robertson, Northern Trust
9:00 AM - 10:15 AM	<p>What is Responsible Investing: Past, Present and Future? The session will feature a detailed discussion around the growing market of Responsible Investing. The panelists will cover themes and trends in asset growth, asset class demand, and various investor preferences related responsible investing. Also, the event will preview the different methodologies to defining, measuring, and monitoring responsible investing objectives & risks. <i>Topics to be covered :</i> defining responsible investing, global asset distribution and trends, current themes, and what's ahead</p>	Randy O'Neil, Executive Director MSCI ESG, Inc. Lisa Woll, CEO, US SIF and US SIF Foundation Mamadou-abou Sarr, Northern Trust
10:15 AM - 10:30 AM	Break	

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10:30 AM - 11:45 AM	<p>Aligning Investments with Social Impact Impact Investing has emerged as a growing trend and is considered by many experts and practitioners as one of the most promising approaches to unlocking significant sums of private investment capital to complement public resources and philanthropy. This session will explore the component parts and market potential of impact investing and opportunities to participate in this burgeoning field. <i>Topics to be covered:</i> program-related investments, social impact bonds, social enterprises and hybrid charities, mission-driven investments</p>	Nima Krodel, Nonprofit Finance Fund Scott Kleiman, Staff Lead, Social Impact Bonds Initiative, Governor’s Office of Management and Budget Dan Nielsen, Director, Socially Responsible Investing, Christian Brothers Investment Services
11:45 AM - 1:00 PM	<p>Lunch Session Northern Trust Global Market Update & Outlook</p>	
1:00 PM - 1:15 PM	<p>Break</p>	
1:15 PM - 2:30 PM	<p>Marrying Investment Objectives & Strategy with Responsible Investing</p>	
2:30 PM - 3:15 PM	<p>Legal & Practical Considerations of Investing Responsibly Among the important responsibilities of managers of family offices, directors and trustees of foundations, endowments and public charities is deciding how and where to invest their organization’s assets. This session will explore challenges and options available for investors who seek to implement investment policies that will achieve the greatest impact by pursuing both maximum financial returns and social and environmental benefits. <i>Topics to be covered:</i> fiduciary responsibilities and ESG issues, creating investment policy statements that incorporate responsible investing and evaluating adherence to SRI/ESG investment policies.</p>	Linda-Eling Lee, MSCI ESG Research Suzanne Shier, Northern Trust Sally Giegerich, Northern Trust Brian Axelrad, Horwood Marcus & Berk
3:15 PM - 3:30 PM	<p>Break</p>	
3:30 PM - 4:15 PM	<p>Defining the Desired Outcome & Achieving Success Critical to developing an investment policy or implementing an investment program is defining the desired outcome and identifying key metrics of success. Responsible investing and investor preferences tend to vary across multiple issues and factors. Understanding the desired outcome can help to ensure an appropriate path, manage expectations and achieve success. <i>Topics to be covered:</i> articulating expectations, monitoring progress, and lessons learned</p>	Natalie Trunow, CIO Equities, Calvert Funds
4:15 PM - 4:30 PM	<p>Closing Remarks</p>	
4:30 PM - 5:30 PM	<p>Cocktail Reception</p>	