18th July 2018 | LONDON

adviser home

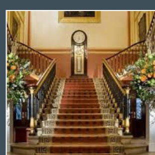
SUSTAINABLE INVESTING

An adviser event with presentations from leading investment experts

City of London Club

08:30 - 14:30 Inc. buffet lunch

Register now



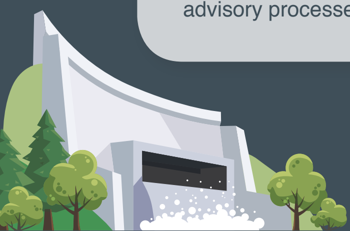
Sustainable Investing Event

1. This event is for financial advisers and planners with an interest in sustainable investments and ESG.
2. Expert presentations from 6 major providers in this sector.
3. The subject is of genuine concern to many clients and advisers need to reflect this concern in their client portfolios.
4. Hear how some fund managers apply it to all funds, others have specialist vehicles. You'll also hear from experts on how to build these considerations into your client portfolios.
5. And you will have the opportunity to discuss and air your views on global and UK trends with panel discussions and networking throughout.
6. Whether sustainable investing is already core part of your advisory process, or a service you offer on request, this event will have something for you and your practice.

European Commission proposals (May 2018) on financing sustainable growth:

"Ensure that asset managers, institutional investors, insurance distributors and investment advisers include economic, social and governance (ESG) factors in their investment decisions and advisory processes "

"Ensure that investment firms and insurance distributors integrate sustainability preferences into their **suitability tests** when offering advice to investors and that the products offered meet their clients' needs."



PROGRAMME 18th July 2018

Register here

08:30 Coffee on arrival

09:00 Chairman's remarks -  **John Lappin** Bio

09:10  **Simon Howard** Bio
CEO of UKSIF (UK Sustainable Investment and Finance Association)
An overview of new or upcoming policy changes affecting advisers on responsible and ESG investment

09:30  **Mike Fox** Bio
Head of UK Sustainable Investments, RLAM
The Sustainable way to meet your Fiduciary Responsibilities

10:00  **Belinda Gan** Bio
Product Manager, Global Sustainability, Schroders
Consumer perspectives: is this a millennial thing? Global and UK consumer attitudes

10:30  **Dr Marc-Olivier Buffle** Bio
Senior Product Specialist Environmental Strategies, Pictet Asset Management
Global Environmental Opportunities: transforming sustainable investment

11:00 Break

11:15  **Ben Constable Maxwell**
Director of Corporate Finance and Stewardship, M&G Bio
Impact investing - in companies, projects or organisations that intentionally seek a measurable social or environmental benefit alongside a financial return

11:45  **Alice Evans** Bio
Director and Co-Head of the Governance and Sustainable Investment (GSI) Team, BMO Global Asset Management
Performance with Principles - a philosophy of invest; avoid; improve - targeting sustainable solutions- driving social and financial performance

12:15  **Jim Wood-Smith** Bio
CIO Private Clients & Head of Research, Hawksmoor
A sustainable World. How sustainable client needs are revolutionising discretionary management

12:45 **Panel Discussion**
chaired by John Lappin

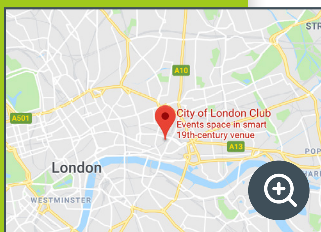
13:15 Lunch

14:30 Depart

Where is it?

City of London Club
19 Old Broad St London
EC2N 1ER

(nearest underground - Bank)



To secure your place

Register here

Please note - this is an adviser only event and places are limited.

Speaker's biographies

John Lappin
Event Chair

Event Chair John Lappin is a freelance financial journalist with two decades experience writing for financial advisers and investors. He is the former editor of Money Marketing and Mindful Money and, among other things, currently contributes to Trust Net, Corporate Adviser and, of course, Adviser Home. He is author of the Adviser Home Guide to Sustainable Investing.

Simon Howard
UKSIF Chief Executive

Simon is a former Chief Investment Officer who has over twenty years of investment management experience.

During a City career that started in 1990, he has been Group Chief Investment Officer at Liverpool Victoria, Head of Investments at Friends Provident and Managing Director at 3i Asset Management. Prior to joining UKSIF, Simon was Head of Sustainable Financial Markets at the charity Forum for the Future.

Mike Fox
Head of UK Sustainable Investments, RLAM

Mike is Head of Sustainable Investments and Fund Manager of the Sustainable Leaders, World and Diversified Trusts. He has managed the Sustainable Leaders since November 2003. Prior to this, Mike worked as a Deputy Fund manager at the Co-operative employee pension fund for two years and an investment analyst covering the utility, support services and media sectors. Mike originally trained and qualified as a Chartered Accountant with Ernst & Young in Manchester. The Sustainable Leaders Trust holds a Bronze Morningstar rating as at June 2017 and Mike has won two Fund Manager of the Year awards, in 2015 and 2017. Mike has spent the majority of his career assessing environmental, social and governance issues and how they influence investment decisions. He is a specialist in sustainable investing and one of the few fund managers in this area with such long tenure.

Speaker's biographies

Belinda Gan
Associate Product Manager, Global Sustainability at Schroders

Focused on ESG and sustainable investing, Belinda leads on client communications and reporting and co-ordinates new product development across our investment teams. She also authors papers on practical aspects of ESG implementation. She joined Schroders in 2010 and is based in London.

Belinda was an Account Executive at Threadneedle Asset Management from 2009 to 2010, which involved working on strategic partnerships in the Global Financial Institutions team within Distribution.

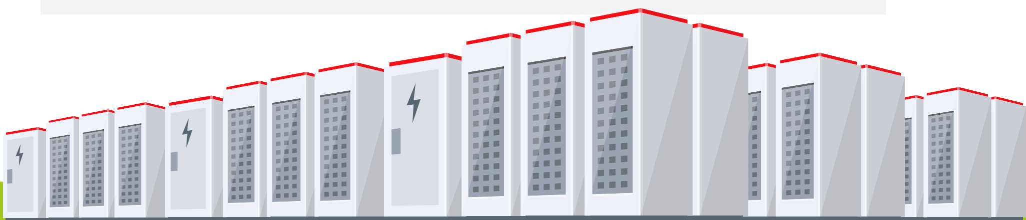
Prior to this she was an Associate, Product Development at Goldman Sachs Asset Management, which involved developing and bringing new funds to market. She also worked in the Consultant Relations team and as an Analyst in the Australian Equities team.

Belinda commenced her career at Goldman Sachs Asset Management in 2004. Belinda holds: Bachelor of Commerce (Finance), Monash University, Bachelor of Business Systems, Monash University, and is a CFA Charterholder.

Jim Wood-Smith
CIO Hawksmoor Investment Management (Discretionary Business)

Jim is one of the most experienced Heads of Research in Discretionary Management. He began his investment career in 1986 with Barclays Trust Company, where he trained as a fund manager and an analyst. He subsequently worked in and managed the research departments of Gerrard Vivian Gray, Greig Middleton, Gerrard and Williams de Broë. He started splitting his time between the City and the West Country in 2005 and now works there full time.

Jim has gained a reputation as a leading commentator on investment issues and is recognised as one of the industry's leading presenters. He was awarded the Daily Telegraph Investment Analyst of the Year in 2010. Jim joined Hawksmoor Investment Management in 2014, where he is currently Chief Investment Officer of the discretionary business. In 2016 he launched Hawksmoor's innovative Ethical Portfolio Management Service and has driven the launch of the Sustainable World Model Portfolio Service



Speaker's biographies

Alice Evans

Director and Co-Head of the Governance and Sustainable Investment BMO Global Asset Management (GSI) Team

Alice returned to BMO Global Asset Management in 2018 having previously worked here as a fund manager from 2010 to 2016, most recently as Co-Lead Manager of the Responsible Global Equity Fund. Prior to BMO, Alice gained ten years of investment experience initially at JP Morgan Asset Management then at Henderson Global Investors, as a fund manager on the Sustainable & Responsible Investment funds, and as a healthcare sector specialist. Alice has a successful track record as a portfolio manager in responsible investment and brings the GSI team first-hand experience of integrating ESG issues into investment research and decision making. Outside BMO, Alice holds a pro bono role as a panel member for the funding programme of the National Institute of Health Research. Alice holds an MSc in Physics from the University of Bristol and is a CFA Charterholder.

Marc-Olivier Buffle

Senior Product Specialist Environmental Strategies, Pictet Asset Management

Marc-Olivier Buffle joined Pictet Asset Management in 2014 as a Senior Product Specialist in the Thematic Equities team.

Before joining Pictet, Marc was at RobecoSAM where he was senior analyst, then head of industrials and finally head of SI research. Prior to that he was responsible for business development at the Danaher Corporation. Marc started his career at Trojan Technologies in London Canada, where he lead an R&D team focusing on water treatment technologies.

Marc holds an MSc in engineering from the ETH in Zurich, and a PhD from EAWAG in Environmental Chemistry and is the author of patents, scientific articles, technical and financial publications.

Ben Constable-Maxwell

Director of Corporate Finance and Stewardship, M&G

Ben Constable-Maxwell joined M&G in 2003 as an investment specialist in the Global Equities team. Ben is a founding member of M&G's Responsible Investment Advisory Forum and has been central to the development of ESG at M&G. Ben leads on sustainability issues for M&G and supports the development of ESG client solutions. He graduated from Newcastle University with an honours degree in Classics.

Sustainable Investing Providers

BMO Global Asset Management

PICTET Asset Management

HAWKSMOOR INVESTMENT MANAGEMENT

ROYAL LONDON ASSET MANAGEMENT

M&G INVESTMENTS

Schroders

Our SI campaign showcases content from 6 major providers and our Sustainable Investing Adviser Guide has proved enormously popular with advisers so we are holding this event to reinforce our initiative to support this important and growing investment trend.

Visit website

Download SI Guide

Contact

john@adviserhome.com

adviser home
www.adviserhome.com