

## Agenda for the 2018 SASB Symposium Tuesday, December 4, 2018

Fordham University, New York City, NY



### **7:45 – 8:45 (concurrent): Attendee Breakfast and Networking**

### **7:45 – 8:45 (concurrent): Sponsor and Speaker Breakfast and Networking (Invite-only)**

### **8:45 – 8:50: Welcome from the Host**

- Barbara Porco, Professor of Accounting, Fordham University

### **8:50 – 8:55: Opening Remarks**

- Matthew Welch, President, The SASB Foundation

### **8:55 – 9:30: Sustainable Value Creation: The Board Perspective**

- Jeff Ubben, Founder and CEO, ValueAct Capital; Director, The AES Corporation
- Elisse Walter, Director, Occidental Petroleum Corporation
- *Moderator: Bob Steel, Partner and CEO, Perella Weinberg Partners; Chair of the Board, The SASB Foundation*

### **9:30 – 9:45: By the Market, For the Market**

- Jeff Hales, Chair, SASB Standards Board

### **9:45 – 10:40: ESG Issues Don't Stay Within Borders, Neither Does Investors' Use of SASB**

- Marjo Koivisto, Co-Head, Responsible Investment, Nordea Asset Management
- Egon Vavrek, Investment Fund Manager, Global Emerging Markets, APG
- Barbara Zvan, Chief Risk & Strategy Officer, Ontario Teachers' Pension Plan
- *Moderator: Katie Schmitz Eulitt, Strategic Advisor, Stakeholder Outreach SASB*

### **10:40 – 11:15: Break & Networking**

### **11:15 – 11:30: Research Spotlight: Applying a Financial Materiality Lens to the SDGs**

- Dr. Costanza Consolandi, Associate Professor of Corporate Finance, University of Siena
- Dr. Bob Eccles, Visiting Professor of Management Practice, University of Oxford, Saïd Business School

### **11:30 – 12:30: Charting a Path Forward in a Sea of Reporting Frameworks**

11:30 – 11:35: Joint statement of complementarity by SASB and GRI

- Eric Hespenheide, Chairman, Global Reporting Initiative's (GRI) Board of Directors
- Matthew Welch, President, The SASB Foundation

11:35 – 12:30: Corporate perspectives on Navigating the Reporting Frameworks

- Natali Archibee, Sustainability Manager, The Mosaic Company
- Sharon Basel, Senior Manager, Sustainability, General Motors Company
- Ginny Cassidy, Director, Enterprise Sustainability Program, Medtronic
- Bruno Sarda, VP of Sustainability, NRG Energy
- *Moderator: Curtis Ravenel, Global Head, Sustainable Business and Finance, Bloomberg LP*

**12:30 – 1:45: Lunch**

**1:45 – 2:00: Research Spotlight: Applying SASB's Materiality Framework to ESG Data**

- Emily Steinbarth, Quantitative Research Analyst, Russell Investments

**2:00 – 2:55: It's Not About Product: Integrating ESG into Investment Processes and Culture**

- Jonathan Bailey, Head of ESG Investing, Neuberger Berman
- Rakhi Kumar, Senior Managing Director and Head of ESG Investments and Asset Stewardship, SSGA
- Julie Moret, Head of ESG, Franklin Templeton Investments
- Mike Perry, Head of Global Product, Nuveen – A TIAA Company
- *Moderator: Janine Guillot, Director of Capital Markets Policy & Outreach, SASB*

**2:55 – 3:10: Research Spotlight: Applying SASB's Materiality Framework to Quantitative Analysis**

- Joshua Livnat, Managing Director and Head of Research, QMA

**3:10 – 3:45: Break & Networking**

**3:45 – 4:40: The Future of Financial Reporting: Integrating ESG into Processes and Culture**

- Alan Beller, Senior Counsel, Cleary Gottlieb Steen & Hamilton
- Rob Lin, Head of Investor Relations, Alibaba Group
- Jeff Thomson, President and CEO, IMA
- Deborah Wilson, Financial Reporting Manager, Trex Company
- *Moderator: Kristen Sullivan, Partner, Deloitte & Touche LLP; Chair, AICPA Sustainability Task Force*

**4:40 – 4:50: Research Spotlight: Measuring and Reporting Climate Risk**

- David Parham, Deputy Director of Research, SASB

**4:50 – 5:30: Sustainable Value Creation: The Role of Investors and of Corporate Disclosure**

- Chris Ailman, CIO, CalSTRS
- Hans Op 't Veld, Head of Responsible Investment, PGGM
- *Moderator: Anne Sheehan, Chairman, SEC Investor Advisory Committee*

**5:30 – 6:30: Cocktail Reception**