



## **HIGH WATER WOMEN INVESTING FOR IMPACT SYMPOSIUM 2017**

**Action Now - Catalyzing Investments  
Energy, Momentum, and Community  
November 30, 2017 New York City**

### **Agenda**

#### **Morning Plenary Sessions**

##### **Symposium**

**8:45- 9:00** Introductory Remarks

**9:00 – 9:40** Keynote

**Change Maker: Visible Leaders**

**9:40 – 10:20** Fireside Chat

**Taking Action: Removing obstacles to change**

Looking at commonly cited challenges to adoption and scale/impact and case studies for overcoming: hurdles - advisors and client dynamics, data quality and measurement, difficulty in creating a total portfolio across different impact themes, customization, new investments/structures, absence of a robust secondary market/ exit mechanism, boards, gatekeepers, intermediaries, policy makers.

**10:20 – 11:00** Morning Plenary

**Fighting for A Better World: Women in Impact Investing**

Women who lead impact investing, managing money, women investors driving impact. What is the role of women in impact, investing in and empowering women, model for diversity in investing – from microfinance forward.

**11:00 – 11:30** - Coffee Break

**11:30 – 12:30- Morning Workshops/Breakout Sessions** (Attendees will select one of four)

Impact can be deployed across the portfolio in different asset classes. Each workshop to include a discussion of portfolio construction with real life examples of action and investing.

#### ***A. Urban Development***

How do we invest in, and build, living cities? What resources are needed, and in which ways. What infrastructure commitments can best help. What is the role of social justice in insuring equality and prosperity for all, and where does for-profit capital play a part? What is the role of responsible banking institutions in economic development? How investors can work with not-for-profit partners. Building up neglected communities. The case for urban manufacturing, stories from Newark and New York. Opportunities in municipal bonds. Examples of execution in different asset classes.

#### ***B. Rural Development***

Developing our rural infrastructure. Helping Women and Girls in rural communities. What are the economic, environmental and social needs of rural communities, both in developed and developing markets? How are these needs met and who is currently focusing on them? Are there insights and learnings from the global microfinance experiences that can be applied to rural economies in developed markets? Are there other interventions that are working cross borders? What are some of the investment failures? What are some of the roadblocks?

#### ***C. Environment and Climate***

Making the difference – integrating the environment opportunity and climate risk into investment portfolios. Recognizing the risks of stranded assets and carbon lock in. Dealing with large corporations, and municipalities, to recognize their climate risk. The global green opportunity in infrastructure and project finance. Green bonds. The investment opportunity in water. Meeting the UN Sustainable Development Goals.

#### ***D. Removing obstacles to change- a deeper dive***

What it takes to get investors to sign on for impact. Dealing with board and family dynamics. Engaging registered investment advisers in the impact conversation. Matching the right approach to an investors profile and finding good investment opportunities. Balancing impact with return needs, expectations. Getting to yes.

### **12:30 – 1:45 - Networking Lunch:**

**The Marketplace: Building your own Investment Portfolio:** A competition and networking marketplace, build an impact portfolio over lunch. With results to be revealed at the end of the conference.

### **1:45 – 2:45 - Afternoon Workshops/Breakout Sessions** (Attendees will select one of four)

#### **A. Housing**

Developments, trends in impact and housing. How best to invest for impact? Measuring returns and results. Is housing the impact entry point for institutional asset owners? Housing in developing market economics. Education and other non-real estate related components of building sustainable communities. Innovations in housing design.

#### **B. Agriculture**

The production and consumption of agriculture. Transforming from Big Ag to sustainable solutions for global problems. Thinking about agriculture in investment portfolios – are big investors part of the problem? Systems that work, investing in developing market agriculture. Offering incentives to farmers for better practices. Immigration reform and what it means for food systems. The move toward sustainable eating and food access for all. Food and the environment.

#### **C. Diversity**

Diving deeper into diversity issues. How to achieve true diversity across strategies and asset classes. Working with managers to insure they address diversity both in their investment approach and at their own institutions. Effective examples of promoting diversity, with a special focus on women. Diversity at corporations, does change come from the top? Women and minorities and the power of the investment dollar. The fight for institutional change. The financial returns due to diversity.

#### **D. Measuring Impact Challenges**

How to best measure impact. What impact measurement tools are out there and what ways are the most effective? The most effective sources of impact – and alpha. Engaging with corporations and impact measurement in the public markets. Follies and pitfalls of impact measurement – asking the right questions. Impact measurement in the era of big data. Measuring impact across portfolios. Impact as a source of alpha. Outcomes verses inputs.

**2:45 – 3:15 - Coffee Break**

### **Afternoon Plenary Sessions**

**3:15 – 3:30 - The Impact Portfolio Wrap-up:** Meet the investment portfolio of the future. With comments and insights developed from today's program.

#### **3:30 – 4:00 - Fireside chat with Governor Deval Patrick**

Interviewed by Imogen Rose-Smith, Investment Fellow, University of California

#### **4:00 – 4:40 - Panel Discussion: IMPACT! Impact investing in the new age of social activism.**

The place of impact investing in social and environmental activism. The intersection between consumer activism and impact. The role of impact investing and the media. Confronting today's challenges from the treatment of women in society to immigration reform and confronting climate change – where impact can play a part, and where other actions are needed. The relationship between impact investing and government.

#### **4:40 - 5:20 - Panel Discussion: Go Big or Go Home: the bold ideas driving impact investing today.**

What is the future of impact investing? The best bold new ideas driving impact investing today.

**5:30 - 7:00 - Join us for a cocktail reception**