



ESG Roundtable

Sep 14 | Philadelphia | 

Agenda

- 8:30 am Registration & Continental Breakfast
- 9:00 am Opening Remarks & Introductions
- 9:30 am **Quantitative and Qualitative ESG Factors—A Balancing Act**
How do we standardize the ESG conversation in our industry while still differentiating ourselves? What are the opportunities and challenges around client and intermediary marketing and reporting? This discussion will look at both the objective and subjective components of ESG while providing insights on what has and hasn't worked for firms.

Moderator: **Pamela Meenan**, Senior Marketing Manager, Institutional | abrdrn
Benjie Elston, Director, Head of Sustainability | White Marble Consulting
Chris Fidler, Senior Director, Global Industry Standards | CFA Institute
- 10:30 am Break
- 10:45 am **Is the Geopolitical & Economic Environment Hurting the Cause?**
Industry leaders will share perspectives on the impact economic and political factors may have on ESG as well as the short- and long-term potential effects on positioning.

Moderator: **Barry Gladstein**, Head of Sustainable Investing | Macquarie
Stephen Byrd, Managing Director, Head of Global Sustainability Research | Morgan Stanley
Matt Apkarian, Associate Director, Product Development | Cerulli Associates
- 11:45 am Lunch
- 12:45 pm **ESG Regulatory Outlook**
This conversation will take a broad, global view on current regulatory issues with a heavy emphasis on Europe (SFDR) and the United States (SEC Proposed Regulations, SEC Enforcement Actions, DOL Landscapes, etc.).

Moderator: **Jeff Vorwerk**, Strategic Projects, Portfolio Director | Principal
Christine Lombardo, Partner | Morgan, Lewis & Bockius LLP
- 1:45 pm Break
- 2:00 pm **Executive Roundtable**
This intimate and interactive format enables participants to candidly discuss topics ranging from the day's agenda to other critical business management issues.
- 3:00 pm Adjourn