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Impact Investing 2012

Investments for profit, people and the planet

London, 4 October



- Discover how to penetrate this market, where the highest returns are to be found and how to manage the major risks
- Benefit from the first-hand experiences of investors already active in the main areas of interest
- Join in a varied interactive programme of panel discussions and case studies
- Meet, share knowledge and do business with other participants

Keynote Speaker:

- **Lord Fink, CEO, ISAM**
(formerly *Deputy Chairman, Man Group*)

Top-level speakers include:

- **Penny Shepherd MBE, Chief Executive, UK Sustainable Investment and Finance Association (UKSIF)**
- **Michele Giddens, Executive Director, Bridges Ventures**
- **Ed Siegel, Director of Investments, Big Issue Invest**
- **Vinay Nair, Business Development - Europe, Acumen Fund**
- **Jonathan Hammond, Partner, International Head of Financial Markets, Simmons & Simmons**
- **Christoph Dreher, Founding Partner, Center for Social and Sustainable Products**
- **James Vaccaro, Head of Market and Corporate Development, Triodos Bank NV**
- **Matt Robinson, Director of Strategy and Market Development, Big Society Capital**
- **Abyd Karmali, MD, Global Head of Carbon Markets, Bank of America Merrill Lynch**
- **Vivina Berla, Senior Partner & MD Europe, Sarona Asset Management**

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and host:

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Debate the most effective ways to generate environmental, social and financial returns

www.environmental-finance.com/events

About our sponsors:

Green sponsor and host:

Simmons & Simmons

Simmons & Simmons is a world-class law firm with a market-leading Cleantech and Environmental Finance practice. Simmons & Simmons understands the significance of sustainability issues for its business clients and the investor community and has a deep knowledge of the legal and practical aspects of investing in emerging market jurisdictions. Simmons & Simmons is trusted with its clients' toughest challenges to deliver practical and innovative solutions, advising on carbon reduction and renewable energy projects, emissions trading, climate litigation and creative financial structures, funds and bonds. Law Firm of the Year 2011 and award winning developers of CleantechCurve.com, Simmons & Simmons strives to innovate in this space, winning a "stand out" ranking in the FT Innovation Award 2010 for carbonleapfrog.org. www.simmons-simmons.com

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The Center for Social and Sustainable Products (CSSP) is an independent consultancy that specialises in strategy and sustainability questions in the area of sustainable and responsible investments as well as corporate social responsibility. CSSP places considerable emphasis on sustainable investments that are increasingly growing beyond the pure aspects of assets – impact investments. The focus is on new business models for family offices and charitable foundations, web-based platforms for distributing information and analysis of impact investments. CSSP considers itself to be a navigator in a diversified market with a wide range of different SRI products and services. www.cssp-ag.com

Silver sponsor:

Triodos Bank

Triodos Investment Management, a 100% subsidiary of Triodos Bank which is one of the world's leading sustainable banks, is a globally recognised leader in impact investment, managing direct investments ranging from sustainable energy infrastructure to microfinance institutions. It currently manages 20 funds (totalling €2.1 billion) investing in both Europe and emerging markets with a range of risk-return profiles and financial instruments. Individuals and institutions can invest in Triodos funds selected from themes including climate and energy, microfinance, sustainable trade, organic food and agriculture, arts and culture, sustainable real estate and listed companies with above-average ESG performance. www.triodos.com

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ClimateCare is an independent 'profit for purpose' organisation committed to tackling global climate change, poverty and development issues. Its rigorously monitored climate and development projects create substantial emissions reductions, while quantifying and delivering poverty alleviation and public health outcomes, improving millions of lives worldwide. ClimateCare manages some of the world's largest corporate carbon offsetting programmes. It also originates and sources compliance and voluntary carbon credits on behalf of large corporates, NGOs and nation states. ClimateCare develops and consults on emission reduction projects in sub-Saharan Africa and throughout the world's least-developed countries. Using carbon finance, ClimateCare multiplies positive impacts, delivering results at scale. www.climatecare.org

"I thought Impact Investing 2011 was extremely stimulating worthwhile and useful. I emerged much better informed than I had been beforehand"

Sarah Eastabrook, Power and Environmental Policy, Alstom

About the conference:

With some experts predicting a ten-fold increase in impact investments to \$500 billion by 2014 (1% of all managed assets), this forward-looking conference will analyse and debate the most effective ways for investors to generate environmental, social and financial returns.

Attend to:

- Hear the Keynote Address by **Lord Fink, CEO, ISAM**, (formerly Deputy Chairman, Man Group)
- Debate what impact investing is and what it's not, the market infrastructure, its size and growth potential
- Compare & contrast impact investing with SRI
- Discover how to penetrate this market, where the highest returns are to be found and what the risks and returns might be
- Understand the merits of alternative routes to market – private equity / venture capital vs listed equity & bonds – and which impact areas are reaching scale to ensure you are minimising risk
- Learn how to gauge what your targets should be, and how to measure and report performance
- Take advantage of the first-hand experiences of investors already active in the main areas of interest: Microfinance, Healthcare, Education, Environment, Clean energy, Social housing
- Benefit from superb networking opportunities including the drinks reception at the end of the day – meet, share knowledge and do business with other participants

Who you will meet:

- Institutional Investors
- SRI investors
- Asset/Wealth managers
- Fund managers
- Family Offices
- Private investors
- Project development specialists
- Charitable/Philanthropic foundations
- Microfinance professionals
- Social entrepreneurs
- Legal advisors
- Consultants

How to register:

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Impact Investing 2012

London, 4 October

Programme:

8.00 Registration & networking breakfast

8.45 Opening of conference & chairman's welcome address

Jonathan Hammond, *Partner, International Head of Financial Markets, Simmons & Simmons*

9.00 PRESENTATION:

Impact investing: where are we now?

- Clarification of terminology
- Key differences with SRI
- Is it a new asset class?
- Market size, returns and growth potential
- Global solutions to local problems: microfinance, job creation, education, environment, clean energy, social housing and healthcare

Penny Shepherd MBE, *Chief Executive, UK Sustainable Investment and Finance Association (UKSIF)*

9.40 PANEL DISCUSSION:

The business case for impact investing

- Value creation: a way to mitigate operational, regulatory and reputation risks
- Do social and environmental benefits generate alpha and optimise investment portfolios?
- Innovative financing for domestic social and environmental ventures
- Risks and returns compared to conventional private equity, venture capital and debt investments
- When is impact investing simply good investing?

Michele Giddens, *Executive Director, Bridges Ventures*

John Fleetwood, *Head of Research & Development, MAD Investing*

Ed Siegel, *Director of Investments, Big Issue Invest*

10.30 Morning break & networking

11.00 PANEL DISCUSSION:

Collaborations and partnerships

- Who are the investors? Who benefits from the investments?
- Examples of successful partnerships
- How to engage private equity funds, banks, pension funds, family offices, foundations, charities and philanthropists
- Three-way collaborations between private, public and non-governmental organisations
- Pros and cons of partnership strategies

Moderator: Kurt Hoffman,

Chief Executive, Institute for Philanthropy

Susannah Nicklin, *European Liaison,*

Global Impact Investing Network (GIIN)

James Vaccaro, *Head of Market and Corporate Development, Triodos Bank NV*

Ben Good, *CEO, GVEP International*

Innes Meek, *Independent Consultant;*

former Director, CDC

11.50 KEYNOTE:

An interview with Lord Fink, CEO, ISAM

(formerly Deputy Chairman, Man Group)

12.30 Lunch & networking

14.00 PANEL DISCUSSION:

Managing impact investments

- Assessing and overcoming market challenges – confusion of terminology, high transaction costs, political and legal risks in developing countries
- How to select suitable performance targets
- Deal structuring and new fund creation
- Role of the rating agencies, investment consultants, trading platforms and exchanges
- Understanding how consultancies advise clients and select investment managers
- Measuring and reporting

Vinay Nair, *Business Development -*

Europe, Acumen Fund

Christoph Dreher, *Founding Partner,*

Center for Social and

Sustainable Products

David Bonbright,

Founder & Chief Executive,

Keystone Accountability

14.55 CASE STUDY:

UK's Big Society Capital

Matt Robinson, *Director of*

Strategy and Market Development,

Big Society Capital

15.30 Afternoon break & networking

16.00 CASE STUDY:

Investing in developing countries –

CleanStar Mozambique

Abyd Karmali, *Managing Director, Global*

Head of Carbon Markets, Bank of

America Merrill Lynch

16.30 PANEL DISCUSSION:

The global outlook for impact investing

- Domestic focus particularly on job creation ventures to alleviate poverty
- Finding new and unique ways to finance social and environmental ventures
- Social Impact Bonds
- What new structures are needed to allow more capital to flow?
- Getting profit, non-profit and hybrid business to embrace the concept

Vivina Berla, *Senior Partner & MD*

Europe, Sarona Asset Management

Toby Eccles, *Development Director,*

Social Finance

17.20 Closing remarks and Networking Drinks Reception

Speakers include:



Lord Fink, *CEO, ISAM*
(formerly Deputy Chairman, Man Group)



Penny Shepherd MBE, *Chief Executive, UK Sustainable Investment and Finance Association (UKSIF)*



Ed Siegel, *Director of Investments, Big Issue Invest*



Michele Giddens, *Executive Director, Bridges Ventures*



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Ben Good, *CEO, GVEP International*



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REGISTRATION FORM

Rates per delegate

Package	Rates
1-2 delegates	<input type="checkbox"/> £495 each
3rd delegate	FREE
Academics/not-for-profits /organisations based in developing countries	<input type="checkbox"/> £247.50 50% discount!

The conference fee includes attendance at all conference sessions, conference documentation, lunch, refreshments and the Networking Drinks Reception

Only one discount per conference delegate may be claimed.

All prices are subject to VAT.

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Please note that payment should be received at least one week prior to the conference to ensure your place and admission (VAT no. 744 1138 52).

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Documentation

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