

6th edition

IMPACT SUMMIT AMERICA

IMPACT INVESTING CONFERENCE
FOR INSTITUTIONAL INVESTORS
& ASSET OWNERS

16 October
2025
NEW YORK

AGENDA



EYES ON THE FUTURE



We support the SDGs





EYES ON THE FUTURE

In a world marked by complexity and rapid change, resilience and adaptability aren't optional, it's essential. Under this year's theme Eye on the Future we invite institutional investors and asset owners to explore how we adapt, lead, and invest with long-term purpose in mind. This new era requires investors who are not only visionaries but also stewards of the principles they uphold, creating environments where these values flourish and have a measurable impact on the world to fully serve their fiduciary duty. Some of the key themes on the agenda:

NAVIGATING POLARIZED ENVIRONMENT



In an increasingly polarized world and unstable market environment can pose significant challenges for investors seeking to uphold principles of equity and fairness. This subtheme explores strategies for navigating polarization and its implications for long-term investment decision-making.

COLLABORATIVE STEWARDSHIP IN AN ERA OF COMPLEXITY



As the pace of global changes accelerates, traditional models of stewardship are being tested. The challenges we face are interconnected and system-wide, from climate risk and social fragmentation to technological disruption. In this context, siloed strategies and short-term metrics can no longer suffice.

REDEFINING FIDUCIARY DUTY



We explore how fiduciary duty is being reinterpreted in a time of transition and what does it mean to act in the "best interests" of beneficiaries in a world shaped by systemic risks? We discuss on going topics on how do legal frameworks, investor expectations, and real-world outcomes intersect.

SCENARIO ANALYSIS AS A STRATEGIC COMPASS



How can forward-looking, scenario-based analysis move from a compliance tool to a strategic driver? We'll explore methodologies and how they can inform real-world decision-making across sectors.



9:00 – 9:30 | Asset owner registration for the Investors' breakfast workshop

Lobby

9:30 – 10:20 **Investors Breakfast Workshop | Myth busting LP reporting standards**

Asset owners only - Blue Room

As impact investing matures, LPs are demanding clearer, more consistent reporting to assess whether funds are truly delivering on their stated impact goals. In session we cover certain myths from surveyed LPs & GPs around reporting challenges to unpack the root causes of these discrepancies. We'll explore how both sides can align expectations, improve data transparency, and co-create more effective, decision-useful impact reporting.

Speakers:



Mike McCreless
Executive Director
Impact Frontiers



Marieke Spence
Executive Director
Impact Capital Managers

9:30 – 10:30 | Registration & welcome coffee (all attendees)

10:30 – 10:40 **Opening remarks/Host of the day | Welcome by Phenix Capital Group**

Plenary room

The host organisation, Phenix Capital Group, will welcome delegates, highlight key aspects of the Summit, and present an overview of current impact investing trends drawn from Phenix's proprietary database.



Yana Kaloshina
Director
Phenix Capital Group - Impact Intelligence

10:40 – 10:55 **Keynote speech | A call for collective action**

Plenary room

This keynote explores how enduring climate progress requires a bold alliance across technology, business, community activism, and culture; each offering a unique path to change. In a time of political volatility and rising division, it calls for solutions that transcend election cycles and touch every part of society. By honouring innovation, justice, and imagination, the keynote underscores that we fight for the planet not only out of urgency, but because of the possibility we believe the future holds.



William Burckart
CEO of **The Investment Integration Project**
Adjunct Professor and The Brandmeyer Fellow for Impact and Sustainable Investing at SIPA, **Columbia University**

10:55 – 12:00 **Investor panel I Investing in climate adaptation and resilience investments: is it just good business?**

Plenary room

Investing in climate adaptation is no longer just a moral imperative, it's one of the most financially sound development strategies available. This session covers why adaptation is underfunded despite proven economic and social value and will highlight investable opportunities that deliver outsized impact even in the absence of climate disasters.



Karine Sarkissian
Managing Partner
Tamar Ventures



Sandra Osborne Kartt
Deputy Chief Investment Officer
ImpactAssets Capital Partners



Richard E. Zimmerman
Partner
WE Family Offices



Robert Schultz
Partner
Capricorn Investment Group



Abbey Schmitt
Sustainable & Impact Investing
GCM Grosvenor
Moderator

12:00 – 13:00 | Lunch

13:00– 14:15

InvestorConnect session (Pre-scheduled meetings, for Asset owners)

Breakout session A1
Plenary room



This dynamic session, a unique feature of Impact Summit Asia, is designed to give asset owners an efficient way to explore a curated selection of pre-screened, institutional-quality impact strategies. The sessions offer the opportunity to gain insights into the current market while also connecting with fellow asset owners and impact practitioners along the way. Through a series of 15-minute speed meetings, participants can learn how these curated strategies aim to generate impact and ask relevant questions within an informal setting.

13:00– 14:00

Panel discussion I Re-thinking impact exclusions amid complexity

Breakout session B1
Blue room

In this session, we address how exclusion lists are evolving (nuclear, fossil fuels, defence), and the ethical, financial, and geopolitical pressures that are reshaping decision-making. We also discuss the complexities of dual-use technologies and whether ethical frameworks can keep pace with innovation.



Mark Hays
Director of Sustainable & Impact Investing,
Managing Director
Glenmede



Nishi Patel
Investment Analyst
Westfuller Advisors



Prachi Modi
Programming Manager
Phenix Capital Group
Facilitator



14:30–15:00 **Panel discussion | Investing with a social equity lens**Breakout session A2
Plenary room

Investors are rethinking how to deploy capital in ways that advance equity across communities. This panel explores strategies for investing with a deliberate focus on supporting immigrant communities, BIPOC entrepreneurs, and gender equity, while addressing systemic barriers in health, education, and financial inclusion. Panelists will discuss how to evaluate and manage risk in today's evolving impact landscape, frameworks for measuring equity focused outcomes, and approaches to aligning portfolios with both financial goals and social transformation.



Evalinde Eelens, MBA, MSC, FRM, CAIA;
Professional Board Member
Pension Funds



Josh Tanenbaum
Founder and Managing Partner
Rebalance Capital



Randall Strickland
Director, Client Portfolio Manager
Westfuller Advisors



Smitha Das
Senior Director, Investments
World Education Services



Jyoti Aggarwala
Principal
Private Capital Raise
Moderator

14:30– 15:00 **Panel discussion | Redefining fiduciary duty & stewardship**Breakout session B2
Blue room

We are entering a new era of investor influence where rising legal scrutiny intersects with rising generational values. As governance norms shift and ESG pushback grows louder, shareholder engagement is under the microscope. At the same time, a historic wealth transfer is underway, with younger generations and underrepresented communities are bringing a deeper commitment to social equity, climate justice, and long-term stewardship.



Peter M. Lupoff
Partner
Beatrice Advisors



Ryan Malloy
Sustainable Investing Research Analyst
Fiduciary Trust International



Kelsey Whatley
Principal
Cerity Partners OCIO



Kay E. Makishi
Vice President
Lupoff/Stevens Family Office
Moderator

15:20-16:00

**Panel discussion | Public-Private collaboration in impact investing:
navigating challenges and opportunities**

Plenary room

In this panel, we explore how governments, private investors, and non-profit organizations can work together to enhance the effectiveness of social & environmental investment initiatives in the Americas. The discussion focuses on innovative financing mechanisms, policy frameworks, and strategies for overcoming coordination barriers at local, regional, and national levels.



Fatna Chelihi
Associate Portfolio Specialist
T.Rowe Price



Henry Levy
Treasurer
Alameda County



Sylvia Poniecki
Director, Impact Investments
Wespath Benefits and Investments



Karen Sunderam
Investment Strategist
ImpactAssets Capital Partners



Erika Brice
Investment Officer, Social Investment Practice
The Kresge Foundation
Moderator

16:00 - 16:20

Case Study | 3D Investing

Plenary room

The Impact Evaluation Lab (IEL) help investors navigate trade-offs by treating every investment as three-dimensional: risk, return, and impact. IEL doesn't prescribe values but provides transparent data and rigorous analytics so investors can choose what best aligns with their goals. For those who want to "do well and do good," IEL empowers them to balance financial outcomes with meaningful social and environmental impact.



Robert Brown
Founder & Chief Research Officer
Impact Evaluation Lab



William Harris
Executive Director
Working Capital for Community Needs



Terrence Keeley
Chairman
Impact Evaluation Lab



A debate style conversation between different organizations. Corporations, Fund Managers, and Investors are head strong in their efforts to pursue net-zero standards while the other organizations have stepped back from net-zero ambitions. We hear their reasonings to help investors understand systemic urgency. With net-zero leadership faltering, the private capital of impact investors becomes even more critical in driving decarbonization, social progress, and resilience



Damien Goodmon
Chief Executive Officer- **Downtown Crenshaw Rising**
Director- **Liberty Ecosystem**



Gregg Meyer
Chief Sustainability Officer
Steve Madden



Rekha Unnithan
Managing Director
Nuveen



Prachi Modi
Programming Manager,
Phenix Capital Group - Impact Intelligence

ADVISING COMMITTEE

We thank our Advising Committee for contributing with their insights towards shaping this agenda:

- Bhavika Vyas Vincent, Managing Director, StepStone Group
- Kavita Vijayan, Senior Director, Head of Marketing, ImpactAssets
- Keren Raz, Senior RI Manager, APG Asset Management
- Laura Weeks, Senior Responsible Investment Manager, Principles for Responsible Investment
- Mike McCreless, Executive Director, Impact Frontiers
- Peter Michael Lupoff, Partner, Beatrice Advisors
- Robert Schultz, Partner, Capricorn Investment Group
- Ryan Malloy, Research Analyst, Sustainable Investing, Fiduciary Trust
- Smitha Das, Senior Director, Investment, World Education Services

REGISTER



FREE PASSES FOR INSTITUTIONAL INVESTORS AND ASSET OWNERS (LPs)
PLEASE REQUEST A COMPLIMENTARY PASS!

Or contact directly our institutional investor relationship manager:
Rami Majed ramimajed@phenixcapitalgroup.com.

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