



EYES ON THE FUTURE

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.



Impact Summit America is a highly curated, invitation-only institutional investor and asset owner conference that annually brings together thought leaders and practitioners in the impact investing space. As a satellite conference to esteemed flagships Impact Summit Europe and Impact Summit Asia, Impact Summit America provides a trusted platform for investors from North America to catalyse institutional capital to support the most ambitious environmental & societal goals, promoting meaningful investments that go hand-in-hand with financial returns.

The programme will offer practical instruments for investors to increase their impact allocation, contributing to scaling their positive impact on people and the planet. It also provides the necessary content and tools to start investing for impact and returns.

We look forward to connecting leading North American institutional investors & asset owners for a meaningful dialogue at the 6th Impact Summit America in New York City.

ADVISING COMMITTEE

This agenda was shaped with input from industry experts:

- **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

Hosted by:



With Industry Partners:



PRELIMINARY AGENDA

| Time | Session Description | |
|---------------|--|------------------------------|
| 09:00 – 09:30 | Registration for the Investors' breakfast workshop | |
| 09:30 – 10:20 | Investors' breakfast workshop Myth busting LP reporting standards <i>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.</i> <i>Facilitators:</i> <ul style="list-style-type: none"> • Mike McCreless, Executive Director, Impact Frontiers • Marieke Spenser, Executive Director, Impact Capital Managers | Asset Owner -only session |
| 09:30 – 10:30 | Registration & Welcome coffee (general attendance) | |
| 10:30 – 10:40 | Opening remarks/Host of the day Welcome by Phenix Capital Group <i>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.</i> <i>Speaker: Yana Kaloshina, Director, Phenix Capital Group – Impact Intelligence</i> | Plenary |
| 10:40 – 10:55 | Keynote speech A call for collective action <i>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.</i> | Plenary |
| 10:55 – 12:00 | Investor panel Investing in climate adaptation and resilience investments: is it just good business? <i>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</i> | Plenary |

highlight investable opportunities that deliver outsized impact even in the absence of climate disasters.

Speakers:

- **Richard E. Zimmerman**, Partner, WE Family Offices
- **Robert Schultz**, Partner, Capricorn Investment Group
- **Sandra Osborne Kartt**, Deputy Chief Investment Officer, ImpactAssets Capital Partners

12:00 – 13:00 Lunch

13:00 – 14:15 Breakout session A1 | InvestorConnect session *(Pre-scheduled meetings, for Asset owners)*

Breakout
A1

This dynamic session, a unique feature of the Summit, 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 Breakout session B1 | Re-thinking impact exclusions amid complexity

Breakout
B1

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.

14:15 – 14:30 Networking coffee break

14:30 – 15:00 Breakout session A2

Breakout
A2

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

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.

Speakers:

- **Fatna Chelihi**, Associate Portfolio Specialist, T.Rowe Price
- **Henry Levy**, Treasurer, Alameda County
- **Karen Sunderam**, Investment Strategist, ImpactAssets Capital Partners

Breakout
B2

14:30 – 15:00 Breakout session B2

Panel discussion | Redefining fiduciary duty & stewardship

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.

Speakers:

- **Peter M. Lupoff**, Partner, Beatrice Advisors
- **Ryan Malloy**, Sustainable Investing Research Analyst, Fiduciary Trust International
- **Keren Raz**, Senior RI Manager, APG Asset Management

15:00 – 15:20 Networking coffee break

Plenary

15:20 – 16:00 Panel discussion | Investing with a social equity lens

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.

Speakers:

- **Evalinde Eelens**, MBA, MSC, FRM, CAIA; Professional Board Member, Pension Funds
- **Smitha Das**, Senior Director, Investments, World Education Services

16:00 – 16:20 Case Study | 3D Investing

Plenary

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.

Speakers:

- **Robert Brown**, Founder & Chief Research Officer, Impact Evaluation Lab
- **Terrence Keeley**, Chairman, Impact Evaluation Lab

Plenary

16:20 – 17:20

Standoff | Net Zero Ambitions

A debate style conversation between four corporations. Two corporations are head strong in their efforts to pursue net-zero standards while the other two corporations 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.

17:20 – 17:30

Closing Remarks

Speaker: **Prachi Modi**, Programming Manager, Phenix Capital Group

17:30 – 18:30

Closing reception drinks

WHO SHOULD ATTEND:

INSTITUTIONAL INVESTORS & ASSET OWNERS

This invitation-only programme is catered for C-Suite, Board Members, Portfolio Managers, ESG/Impact Investing officers, and respective teams of:

- Public and Corporate Pension Funds and their Fiduciary Managers,
- Insurance Companies,
- Family Offices,
- Sovereign Wealth Funds & Development Finance Institutions,
- Foundations and Endowments,
- Wealth Managers/Private Banks,
- Faith-based Organisations

➤ **Asset owners may apply for a Complimentary ticket. [Please request an invitation >>](#)**

➤ **Other ecosystem players are welcome to find [participation options here >>](#)**

