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Fiduciary Duty in a Changing World: Impact Investing - the Why and How

esela Online Event - 8 July 2020

11 am BST | 12 noon CEST | 6 pm HKT | 8 pm AEST



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Speakers

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- **Ida Levine**, Principal at **Two Rivers Associates** (Moderator)
- **Sarah Gordon**, Chief Executive of the **Impact Investing Institute**
- **Stuart O'Brien**, Partner at **Sacker & Partners LLP** and Chair of the **Pensions Climate Risk Industry Group**
- **Luba Nikulina**, Global Head of Research at **Willis Towers Watson**
- **Jill Youds**, Trustee Member of **NEST Corporation** (National Employment Savings Trust)
- **Bella Landymore**, Policy Director of the **Impact Investing Institute**



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Good Governance Principles for Pension Trustees

The Five Principles

1. **Adopt a 'transitional mindset':** Trustees should both manage the risks and seize the opportunities presented by the move towards a net zero economy, and other major societal transitions.
2. **Set impactful objectives:** Trustees should establish and incorporate 'impact objectives' as part of their pension fund's statement of investment principles (SIPs), which draw on the views of members and are calculated to serve the fund's purpose.
3. **Appoint investment consultants and managers with impact integrity:** Trustees should identify and appoint investment consultants with good impact investment credentials, and investment managers who can achieve the fund's impact objectives through their investment and stewardship activities.
3. **Use your voice to make change:** Trustees should progress their impact objectives through their voting and engagement activities by formulating stewardship guidelines.
4. **Manage your impact by measuring it:** Trustees should monitor progress against their impact objectives by reviewing them regularly against relevant indicators and benchmarks, assisted by their investment managers.



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Q&A



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**The Principles are currently in draft form
and we are seeking your feedback.**

Submit comments to Bella Landymore, Policy
Director at the Impact Investing Institute.

bella.landymore@impactinvest.org.uk



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Thank you

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