

Pensions for Purpose

Introduction to ESG, Sustainable and Impact Investment



www.pensionsforpurpose.com

This one-hour virtual workshop from the Pensions for Purpose team covers:

- A review of the Spectrum of Capital
- A step-by-step guide to:
 - Responsible investing
 - Sustainable investing
 - Impact investing
- How managers can invest assets for each of the above
- Divesting versus decarbonisation – pros and cons of each approach
- Can pension funds invest in impact investment whilst still delivering to their fiduciary responsibilities?
- Case studies of other pension funds
- Impact measurement
- Consider next steps

Preparation for the workshop:

- We kindly request the following background on your pension fund:
 - Your current statement of investment principles
 - The asset mix and mandate styles for your fund
 - Any sustainable or impact investment funds that you currently offer to members as self-select funds/include in your default fund/include in your defined benefit fund
- We also request a short pre-meeting with the sponsor of this session, to agree logistics and to discuss any questions you might have

Logistics:

The session runs for around one hour, with time for questions as we go through. The workshop is run using Zoom and we ask delegates to join ten minutes beforehand to check for any technical issues and to introduce themselves to the Pensions for Purpose team.

We share slides on screen and by agreement can record the session for you to share with colleagues afterwards.

Delegates:

At previous sessions, these workshops have been attended by some or all of the following:

- Trustees
- Pensions managers
- Sponsors
- Consultant/advisers
- Staff/union/member representatives

Participation:

Where there are a large number of participants, we usually make use of the use of the chat facility to express views or ask questions. We then invite individuals to share their questions when there is a natural break in the discussion

Outcome:

This workshop is an introductory session which frames investments using the new dimension of purpose in capital, alongside risk and return. It is a useful starting point for our subsequent investment beliefs workshop (a fee is payable for this second workshop), which allows trustees to commence their journey towards a more sustainable investment approach.

Cost:

The introductory workshop is offered free of charge.

Pensions for Purpose team:

This workshop is delivered by one of our experienced team. Biographies are shown below.

Charlotte Tyrwhitt-Drake:

Charlotte has over 14 years of professional experience in asset management, starting in fund analysis and progressing through to business development. Charlotte has worked for some very well-known institutions, including Jupiter, Pictet and Cambridge Associates. Her most recent roles have been as a director of business development focused on building advisory and fiduciary relationships with pension schemes. Through her roles, Charlotte has built a knowledge and passion for responsible and sustainable investing. She has demonstrated this in co-authoring a paper with the Society for Pension Professionals on Social Impact Investing and speaking on topics such as fee and service transparency at PLSA and Transparency Taskforce events. As well as working for Pensions for Purpose, Charlotte runs her own consulting business Impact Challenger Ltd which focuses on identifying the key parties in the impact investment chain and creating solutions to help capital flow more efficiently through the chain. Outside of work Charlotte is a volunteer with Redstart (a charity working to educate children on savings and investments), a singer in a band and is also finishing a self-build.

Karen Shackleton:

Karen has worked in the finance sector for over 30 years. She provides independent investment advice, through MJ Hudson Allenbridge, to the London Boroughs of Islington, Camden and Hounslow, and Warwickshire County Council pension funds. In 2017, she set up Pensions for Purpose, a collaborative information-sharing platform which aims to raise awareness of responsible, sustainable and impact investment amongst pension funds. She is non-executive Chair of Resonance Ltd, an impact manager investing in real estate social impact opportunities, and Deputy Chair of the Strategic Investment Board for the Ministry of Justice. Karen also sits on the Advisory Council for the Impact Investing Institute, which aims to accelerate the growth and improve the effectiveness of the impact investing market.

For more information please email:

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