

# OWNERSHIP DAY

Use shareholder rights to improve your returns

25 MARCH 2021



## Active ownership and ownership strategies

### Agenda

25 March 2021

- 09.45 **Opening Remarks**  
**James Alexander**, Chief Executive Officer, UK Sustainable Investment and Finance Association
- 10.00 **Stewardship for the net zero transition**  
Exploring the latest developments in stewardship and the role effective stewardship can play in the drive to a net zero future
- **Colin Baines**, Investment Engagement Manager, Friends Provident Foundation and ESG Olympics
  - **Caroline Escott**, Senior Investment Manager, RPMi Railpen
  - **Olga Hancock**, Senior Engagement Analyst, Church Commissioners for England
  - **Tom Lorber**, Senior Manager Climate Change, Children's Investment Fund Foundation
- 11.00 **Break**
- 11.10 **The future of voting**  
Voting is in the spotlight in 2021, this session will share the latest developments in this field
- **Alia Gerar**, Director of Communications, Citizen Shareholders
  - **Simon Howard**, Chair of Taskforce on Pension Scheme Voting Implementation
  - **Georgia Stewart**, Chief Executive Officer, Tumelo
- 12.10 **2021 voting season**  
A look ahead to the 2021 AGM season and votes taking place
- **Lily Tomson**, Head of Networks, ShareAction
- 12.30 **Lunch**  
A facilitated zoom room will be opened for delegates who wish to network with other participants

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13.15 **FCA Keynote Speech**  
**Mark Manning**, Technical Specialist, Sustainable Finance and Stewardship  
Financial Conduct Authority

13.30 **Accountability of asset managers**  
How can we improve the conversation between AOs and AMs?

- **Louise Dudley**, CFA Portfolio Manager, Federated Hermes
- **Kaisie Rayner**, Climate Change Lead, Royal London Group
- **Neil Scarth**, Principal, Frost Consulting
- **Owen Thorne**, Portfolio Manager – Monitoring & Responsible Investment, Merseyside Pension Scheme

14.30 **Regulatory look-ahead**  
How can schemes meet upcoming requirements, such as TCFD?

- **Joe Dabrowski**, Deputy Director Policy, Pensions and Lifetime Savings Association
- **Joanne Etherton**, Climate Finance Lead, ClientEarth
- **David Fairs**, Executive Director of Regulatory Policy, Analysis and Advice, The Pensions Regulator
- **Tony Rooke**, Director of Climate Transition Risk, Willis Tower Watson

15.30 **Closed roundtable for asset owners**  
A closed door session for asset owners to share challenges and solutions

17.00 **Close**

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