

**Agenda**

**Day One, Monday 22<sup>nd</sup> October**

**TRUST IN FINANCE**

Trust in the banking and investments sector is crucial to encouraging saving and promoting sustainable economic growth. The morning sessions reflect how banks and investors are responding to the post-global financial crisis era and the new world of socio-economic drivers. How are they positioning themselves for the growing trend of sustainability, ESG and responsibility?

<b>8.00 – 9.00</b>	<b>Registration and Refreshments</b>
<b>9.00 – 9.05</b>	<p><b>Opening remarks</b>  Omar Shaikh, Advisory Board Member, <b>UKIFC</b> and  Hugh Wheelan, Managing Editor, <b>Responsible Investor</b></p>
<b>9.05 – 9.10</b>	<p><b>Keynote address</b> (video-message)  Sir Howard John Davies, Chairman, <b>Royal Bank of Scotland (RBS)</b></p>
<b>9.10 – 9.20</b>	<p><b>Formal Opening</b>  Susan Fouquier, Head of Transaction Banking Product Franchise, <b>Royal Bank of Scotland (RBS)</b></p>
<b>9.20 – 9.30</b>	<p><b>Keynote Address</b>  Ivan McKee MSP, Minister for Trade, Investment and Innovation, <b>the Scottish Parliament</b></p>
<b>9.30 – 9.40</b>	<p><b>Keynote Address</b>  Rt Revd David Urquhart, <b>Bishop of Birmingham</b></p> <p>Bishop David is a Church Commissioner and joined the House of Lords in October 2010.  He is also part of The Banking Standards Board, an independently led body that promotes high standards of behaviour and competence across the UK banking industry.</p>
<b>9.40 – 10.40</b>	<p><b>Panel discussion: The continuing problem with finance</b>  Ten years on from the financial crisis, can we say financial markets are more sustainable and less prone to boom and bust?  What's really changed?  Do we need fresh thinking and a different economic paradigm: is that possible?  How much trust do customers have in their banking and investment products? Does it matter? Is the generational wealth shift to millennials changing that?  How can financial products be made more sustainable, trustworthy and responsible?</p> <p><b>Speakers:</b> Sebastian Burnside, Chief Economist, <b>Royal Bank of Scotland (RBS)</b>  Rafe Haneef, Chief Executive Officer, <b>CIMB Islamic Bank</b>  Kate Still, Director for Scotland, <b>Prince's Trust</b>  Rt Revd David Urquhart, <b>Bishop of Birmingham</b></p>

**Moderator:** Mike Clark, Founder Director, **Ario Advisory**

**10.40 – 11.10 Refreshments and Networking**

**11.10 – 12.10 Panel discussion: Sustainable solutions**

How are banks/investment managers addressing the trust deficit by creating positive cultures?

Building financial brands based on trust: what does it really mean? How can clients and customers tell?

Integrating social and financial factors: impact banking, impact measurement in investment.

Transparency and choice: how fin-tech solutions are increasingly telling us about the impact of finance, and what it means for products.

Is challenger finance more sustainable: non-bank credit institutions, credit unions, government banks (SNIB), crowdfunding.

**Speakers:** Helen Bogan, Head of Professional Standards, **Chartered Banker Institute**  
Robert Dellner, Co-Founder, **Centre for Integral Finance and Economics**  
Charles Haresnape, Chief Executive Officer, **Gatehouse Bank**  
Stewart Langdon, Partner, **LeapFrog Investments**

**Moderator:** Rob Lake, Founder, **Authentic Investor**

**12.10 – 13.10 Lunch and Networking**

**13.10 – 13.40 Keynote interview**

The purpose of finance: what is it? And how can faith, charity and endowment investors practically contribute to redefining it?

**David Pitt-Watson, Scottish business and social entrepreneur, author, and a Fellow at Judge Business School, Cambridge University talks with Hugh Wheelan, Co-founder and Managing Editor, Responsible Investor.**

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**FINANCE WITH PURPOSE**

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**13.40 – 13.50 Presenting the Edinburgh Declaration:**

*Over 75 experts representing faith groups, financial practitioners and senior parliamentarians have participated in this globally acclaimed initiative. The interfaith Shared Values Framework (“Edinburgh Declaration”) will underpin the development of a financial solution open to all in society regardless of faith or ethnic background.*

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**Presented by:**

Graham Burnside, Advisory Board Member, **UKIFC**

Shaykh Ruzwan Mohammed, Co-founder, **Solas Foundation**

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**13.50 – 14.50 Panel discussion: Aligning investments with values**

How are faith 'institutions' ensuring that their assets are managed according to their values?

How does ethical/sustainable finance differ across the faiths, and why?

How feasible is it? What are the 'Shared Values' of faith groups that can be mobilised for sustainable finance?

**Speakers:** Stephen Beer, Chief Investment Officer, **Epworth Investment Management Limited** and **The Central Finance Board of the Methodist Church**  
Mohamad Akram Laldin, Executive Director, **International Shariah Research Academy (ISRA)**

Revd Fiona Stewart-Darling, **Canary Wharf Multifaith Chaplaincy**

Josh Zinner, Chief Executive Officer, **Interfaith Center on Corporate Responsibility (ICCR)**

**Moderator:** Martin Palmer, Secretary General, **Alliance of Religions and Conservation (ARC)**

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**14.50 – 15.50 Panel discussion: Solid Foundations**

How do endowments, family offices and philanthropic entities structure their purpose/values within investment strategies?

What investment strategies work best? Can/do endowments work together on responsible investment, and if so, how?

**Speakers:** Colin Baines, Investment Engagement Manager, **Friends Provident Foundation**

Amy Clarke, Partner and Co-Founder, **Tribe Impact Capital**

Lenka Setkova, Executive Director, **Coutts**, and Trustee, **Coutts Foundation**

Jackie Turpin, Head of Finance, **Joseph Rowntree Charitable Trust**

**Moderator:** Heather McGregor, Executive Dean, **Edinburgh Business School, Heriot-Watt University**

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**15.50 – 16.20 Refreshments and networking**

**16.20 – 17.20 Panel discussion: Investing and engaging to prevent climate change**

Climate change and fossil fuel, divestment, where do faith and endowment investors stand, what are they doing?

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Current solutions - voting and engagement, investment strategies.

**Speakers:** Sian Ferguson, Trust Executive, **Ashden Trust, JJ Charitable Trust and Mark Leonard Trust (Sainsbury Family Charitable Trusts)**

Adam Matthews, Co-Chair, **Transition Pathway Initiative (TPI)** and Director of Ethics & Engagement, **Church of England Pensions Board**

Sylvia van Waveren, Senior Environmental Engagement Specialist, Active Ownership, **Robeco**

**Moderator:** Colin Melvin, Partner, **Arkadiko Partners**

<b>17.20 – 17.30</b>	<b>Keynote address</b> <b>Frank Ross, The Rt. Hon. Lord Provost and Lord Lieutenant of the City of Edinburgh</b>
<b>17.30</b>	<b>Conference Day One adjourns, and coaches will take delegates to the Castle reception</b>
<b>18.30 – 20.30</b>	<b>Edinburgh Castle Reception (by invitation)</b>

## Day Two, Tuesday 23<sup>rd</sup> October

**Supporting the United Nations Sustainable Development Goals (SDGs). How to realistically align finance with the SDGs? What are the financing vehicles in both public and private markets? Moving from negative to positive finance.**

The United Nations 2030 Agenda for Sustainable Development provides a framework to address some of these issues at a global level. With annual investment of between US\$5 trillion and US\$7 trillion required each year to meet the Sustainable Development Goals (SDGs) private sector funding, capabilities and know-how must be mobilised.

Faith and endowment investors are among the earliest, leading supporters and adopters.

<b>8.15 – 9.00</b>	<b>Registration and Refreshments</b>
<b>9.00 – 9.15</b>	<b>Keynote Address</b> (video-message) Achim Steiner, Administrator, <b>United Nations Development Programme (UNDP)</b>
<b>9.15 – 9.30</b>	<b>Keynote Address</b> (video-message) John Glen, Economic Secretary to the Treasury and City Minister, <b>HM Treasury</b>
<b>9.30 – 10.30</b>	<b>Panel discussion: The United Nations Sustainable Development Goals as an investment theme. Practically...how?</b>

Originally intended as a set of goals for policy makers, the UN SDGs have become an increasingly interesting theme for corporate and investor sustainability alignment: why, and what does it mean?

What is the appetite/demand from faith endowments, families and philanthropy-sourced capital in terms of 'ethical' investments, i.e. impact investing, SDG's and shared values approaches?

**Speakers:** Peter Baxter, Managing Director, **Project Snowball LLP**  
 Jon 'JB' Beckett, Senior Manager, Responsible Investing, **Scottish Widows**  
 Jamison Ervin, Manager, Nature for Development, **United Nations Development Programme (UNDP)**  
 Catherine Flockhart, Director, **Baillie Gifford & Co**

**Moderator:** Costanza Consolandi, Associate Professor of Corporate Finance, **University of Siena**

**10.30 – 11.00 Refreshments and Networking**

**11.00 – 12.00 Panel discussion: Moving from negative screening and 'sin' stocks towards positive investment approaches**

Is negative screening/divestment a problem or a solution? Can it lead to real change? Why and how are investors looking at more positive investment approaches for economic and societal transformation?

How to think practically about impact investing: rationale, strategy, metrics, measurement and outcomes.

Innovative and new fund solutions, strategies and experiences from asset managers in addressing this growing market appetite.

**Speakers:** Simon Bond, Director Responsible Investment Portfolio Management, **Columbia Threadneedle Investments**  
 James Corah, Secretary, **Church Investors Group**  
 Leslie Gent, Managing Director, Investment Products and Platform, **Coutts**  
 JoAnn Hanson, President, **Church Investment Group**

**Moderator:** Hugh Wheelan, Managing Editor, **Responsible Investor**

**12.00 – 13.00 Lunch and Networking**

**13.00 – 13.45 Keynote address**

Markets function well only when embedded in strong and supportive social institutions.

**John Kay, Economist and author**

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**13.45 – 14.45 Panel discussion: Creating and measuring sustainability and impact across different asset classes**

How do the individual SDGs dovetail with actual investment potential and product?  
How does an ethical/sustainable investment approach translate across different assets: debt, real estate, commodities/forestry, etc.? What are the main ethical concerns in different asset classes?

What's possible in investment solutions, what's the same/different between assets, and how is the product offering evolving? What is the practical experience of investors?

**Speakers:** Rishi Madlani, Sustainable Finance Lead, **Royal Bank of Scotland (RBS)**  
Richard Mattison, Chief Executive Officer, **Trucost, part of S&P Dow Jones Indices**  
Tommy Piemonte, Head of Sustainable Investment Research, **Bank für Kirche und Caritas**

**Moderator:** Kathryn Saklatvala, Director – Investment Content and Thought Leadership, **bfinance**

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**14.45 – 15.45 Panel discussion: Direct impact investing: blended finance, private equity and microfinance**

How is Blended Finance bringing together public and private capital for large-scale investment to help solve some of the world's deepest social and environmental challenges.

What's the role for grant/soft funding by faith, family and endowment investors in enabling private capital for social impact. New innovative finance structures.

Private equity 'impact' investing in established and emerging countries.

A look at the current trends and evolution of microfinance.

The continuing problem with financial exclusion and why it is important

**Speakers:** Stephen Ingledew, Chief Executive Officer, **FinTech Scotland**  
Gail Hurley, Policy Specialist on Development Finance, **United Nations Development Programme (UNDP)**

Farrukh Khan, Senior Director of Business Development, **Acumen**

Modupe Ladipo, Former Chair, **Enhancing Financial Innovation and Access (EFInA)**

**Moderator:** Hugh Wheelan, Managing Editor, **Responsible Investor**

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**15.45 – 16.00 Closing remarks and End of the conference**