

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

October 4th, 2017

SPONSORSHIP OPPORTUNITIES

Benefit from a special 20% discount for early partnership registration,
booking and payment by October 30th, 2017



Dear Executive,

The **new economy** in comparison with the prevailing environment of the 2008 financial crisis is **driven by asset owners, entrepreneurs and investors** who seek a **positive impact in their investments**.

There is, therefore, a **global growth of sustainable assets** driven by global challenges affecting our planet and **investors preference** who factor **social and environmental impact** into their investing decisions.

Connecting profit and impact is the **biggest challenge** for the financial industry as **impact investment** is set to become **mainstream**.

This conference will develop and detail how to **construct impact and alpha under the same model** and across **portfolios and asset classes** from **both investors and manager's perspective**.

Family offices, foundations, institutional investors and managers have different motivations, challenges and constraints that will be pragmatically detailed and discussed over panel discussions.

*Join our **100+ high profile participants** in Geneva next April 19th, 2018 and meet and discuss amongst investors and experts the **key challenges** to the **design, implementation, management, measurement and reporting of an impact strategy embedded in a total asset allocation and portfolio management**.*

François Golbery
Chairman
ESAFON

In Partnership with:

Organised by:

Gold Partner



Partner



GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

Who Should Attend

- Institutional Investors including Asset Managers, Insurers, Re-insurers, Pension Funds
- Large scale Family Offices, Private Investors, Multi Family Offices, Strategic Advisors
- Endowments and Foundations
- Asset & Fund Managers, Lawyers, Administrators and Service Providers
- Real Estate Fund Managers, Real Asset Managers, Private Equity Fund GP's and LP's
- VC, Start Ups, Social Entrepreneurs, Next Gen
- Global Heads of Fund Development
- Private Banks and Wealth Managers willing to set-up and implement impact investment fund vehicles

Conference Key Highlights 2018

- ✓ Latest Key Advances Concurring to The Growth of The Impact Institutional and Family Office Market
- ✓ Targeting Positive Impact in a whole Portfolio Investment Strategy
- ✓ Governance Challenges
- ✓ How Entrepreneurs Carry on Philanthropy in their Business
- ✓ From Impact Measurement to Impact Management in Institutional and Family Office Portfolios
- ✓ Pooling Opportunities for Co-impact Investments Through Both For-profit and Not-for-profit Private Capital
- ✓ Implementing, Measuring and Reporting Positive Impact across Asset Classes
- ✓ How does a Foundation Take Advantage of The New Toolkit in Impact Management?
- ✓ What are The Challenges for Single Family Offices to Create an Impact Investment Capability?
- ✓ How and why a Family Office defines and incorporates an impact investment capability into its business model?
- ✓ From Tech Entrepreneur to Impact Investor: How Sorenson Catalyzed Impact Investing
- ✓ Broadening the Scope of Social and Environmental Impact Investments through Conservation Finance
- ✓ How to Reconcile Institutional Investor's Perspective with Impact Manager's Goals & Objectives
- ✓ Designing key criterion for impact investment from an institutional investor's perspective
- ✓ Result of the survey on Corporate Carbon Strategies & Offsetting: Why or why not to offset?
- ✓ How to select an impact manager
- ✓ 7-year impact investment track record across Latin America and East Africa, in Agriculture, Solar & Microfinance

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

Agenda

Conference, April 19th, 2018

- **8.30 am-9.00 am: Registration & Welcome Coffee**
- **9.00 am-9.15 am: Opening Remarks by François Golbery and the Chairman**
- **9.15 am-9.45 am: Understanding The Ecosystem Behind Impact Investing**
 - Demand side
 - Impact intermediaries
 - Supply side
 - Latest data and key advances

Kurt Morriesen, Senior Manager of Impact Investing (confirmed)

United Nations Principles of Responsible Investments (UNPRI), London, United Kingdom

- **9.45 am-10.15 am: Investing in the UN Sustainable Development Goals & Identifying Key Performance Indicators to Support SDGs**
 - Opportunities for companies and investors
 - Practical solutions
 - State of the art in measuring frameworks
 - Are returns better from higher reported impact?

Dr. Willem Schramade, Senior Portfolio Manager, Impact Investing (confirmed)

NN Investment Partners, The Hague, Netherlands

- **10.15 am-10.45 am: New Financing Approaches to Build-Up An Impact Investing Market & Framework**

Antoinette Hunziker-Ebnetter, Founding Partner & Chief Executive Officer, (asked)

Forma Futura, Zurich

- **10.45 am-11.15 am: Coffee-Break**
- **11.15 am-12.00 pm: How to Develop, Implement and Sustain PPP that Achieve Large Scale Impact Investments**

Laura Quintana, Vice President, Corporate Affairs (asked)

CISCO, USA

- **12.00 pm-12.30 pm: Measuring Carbon Footprint & Decarbonizing Portfolios without Green Washing**

John McKinley, Vice President, Impact Investing , Strategic Product Management (asked)

BlackRock, London, UK

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

- 12.30 pm-1.00 pm: The Future of Impact Investing in a Leading Financial Jurisdiction

Justin Sykes (confirmed)

Managing Director, Innovest Advisory, Guernsey



- 1.00 pm -2.00pm Buffet Lunch hosted by:
- 2.00 pm-2.45 pm: The Impact Cloud: Building the Road to Impact Management
 - Integrating ESG metrics within your Organization
 - Adopting Impact Management Tools to Increase Operational Efficiency
 - Creating Relevant Impact Reporting

Amogh Kanade, Director of Strategic Relations, SoPact, San Francisco, USA (asked)

- 2.45 pm-3.45 pm: Lessons Learnt from a 100% Impact Investing Approach

Dr Charly Kleissner Ph.D, Co-Founder, KL Felicitas Foundation, Toniic, 100% Impact Network, Silicon Valley, California, USA (asked)

- 3.45 pm-4.15 pm: Coffee Break

- 4.15 pm-5.45 pm: Impact Investor's Panel Session: Understanding & Addressing The Demand Side for Impact Investments

Tenke A. Zoltani, Independent Investment Advisor

(confirmed)

Better Finance, Geneva, Switzerland

Member of S & S Committee and Executive Office, Sustainable Finance Geneva (SFG), Switzerland

Kostis Tselenis, Head of Investments

(asked)

QUADIA, Geneva

Julia Profeta, Partner, Impact Investing Fund Manager

(asked)

VOX Capital, Brazil

Brett Stevenson, Chief Operating Officer

(asked)

Umiliki Fund, USA

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

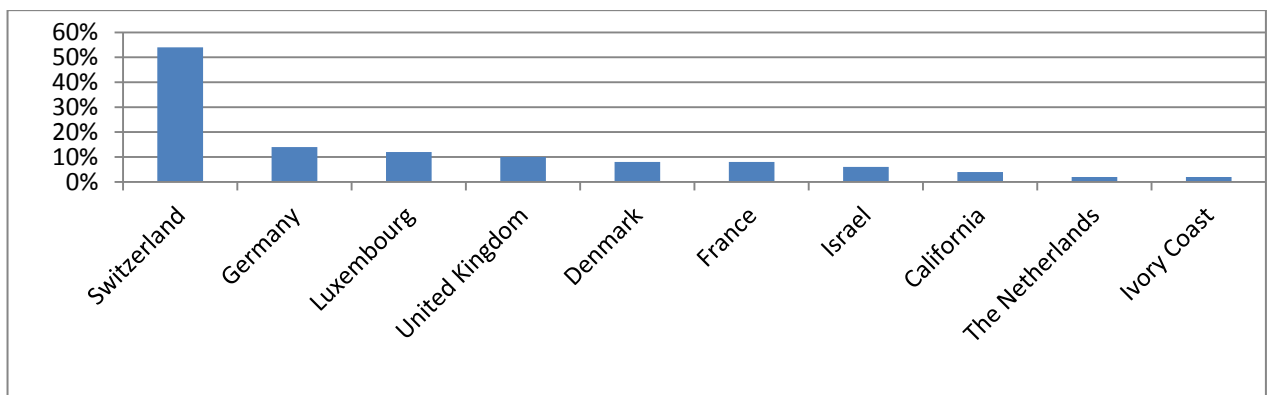
Steve Rocco
Senior Advisor

(asked)

MainStreet Partners, London, UK

- 5.45 pm: Closing Remarks by the Chairman
- 6.00 pm- 7.00 pm: Closing Cocktail hosted by:

ESAFON 2nd Annual Global Impact Investment Strategy – May 18th 2017 – Geneva Breakdown of the Delegates by Country



About ESAFON 1st Annual Global Impact Investment Strategy - November 16th 2016 - Geneva

“We found the sessions particularly insightful and it was a tremendous chance to socialize different ideas, views and perspectives to help drive the impact agenda forward” – BlackRock Family Office, London

“Thank you for the excellent conference yesterday. I was impressed by the quality of the attendees and insightful commentary. I think the small event format was effective, and I was surprised and happy by the very large number of connections I was able to make in a very short period of time” – Mustard Seed Impact Limited, London

About ESAFON 2nd Annual Global Impact Investment Strategy - May 18th 2017 - Geneva

“Thank you so much for inviting me to your conference. You put together a very high quality event. Congratulations!” – Charly Kleissner, Impact Investor - Silicon Valley

“The organization of the conference was excellent as were the facilities. The conference overall was extremely informative and the standard of discussion was high” - Schindler Management Ltd, Zürich

“Let me thank you all very much for having me at today’s very successful event. I can clearly say that I rarely experienced such a high quality of content, speakers and organisation” - onValues Ltd, Zürich

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

GOLD PARTNER



WE ARE GUERNSEY is the brand under which Guernsey Finance promotes the island's financial services sector internationally.

Guernsey Finance - the promotional agency for the island's finance industry internationally - is a joint industry and Government initiative responsible for the promotion of Guernsey. Under the leadership of Chief Executive Dominic Wheatley, the agency ensures that the core values and competencies of Guernsey's finance sector are accepted and respected by the global community and that financial business development flows are enhanced to the island. A new cross-sector financial initiative, aimed at identifying and building business opportunities in the emerging impact investment asset class, has been launched in Guernsey.

Impact Guernsey, facilitated by the Guernsey Chamber of Commerce, aims to proactively develop the emerging impact investment asset class which seeks to intentionally create positive social or environmental impacts as well as generating financial returns.

Impact Guernsey is a group of key business leaders within Guernsey's business, financial and professional services communities, together with representatives from Government and the Guernsey Financial Services Commission.

The group is chaired by Justin Sykes who recently authored a report how impact investment could support effective delivery of public services on the island.

"Impact Guernsey's launch is an important step towards raising awareness of the global trend towards corporate and individual social responsibility, and the business opportunities this offers for Guernsey."

"We are delighted to be developing a platform to promote this emerging asset class and hope to assist the States in formulating its policy in this area as well as creating pathways for a range of products and services to diversify and grow Guernsey's economy," said Justin.

As a first step, Impact Guernsey has circulated a survey to measure the existing levels of activity and interest in impact investment, both off-island and on. The responses will assist in taking this initiative forward. The survey is live until the end of November and can be accessed [here](#).

For more information, please visit our web site: <https://www.weareguernsey.com>

PARTNERS



Management Global Family & Fund Services Ltd (MGFF) is a **global impact investment advisor** helping investors select impact investment opportunities, overcome the lack of information and track record, and undertake due diligence. **MGFF** is helping managers **structure impact investments** and assist them in fund raising.

MGFF is a strategic advisory firm based in Dublin, with 16 years' experience in addressing new developments that will have a long-term impact to the Fund and Wealth Management Industry in Europe, the US, LATAM and Asia.

For more information, please visit our web site : <http://www.mgffadvisory.com>

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

ESAFON PARTNERSHIP OPPORTUNITIES 2018

Should you like to enhance your brand and promote your impact expertise, products and services to high profile Single Family Offices, Impact Private & Institutional Investors and Impact Fund & Asset Managers, don't hesitate to benefit from the ESAFON Partnership Opportunities now available for the 3rd annual Global Impact Investment conference:

- Global Impact Investing, April 29th, 2018, Mövenpick Hotel, Geneva

If interested, please contact Dr Anne Golbery, Senior Managing Director, ESAFON, at a.golbery@esafon.com or on her mobile 00 33 6 45 83 67 67.

Anne will be pleased to discuss with you your specific needs of communication to the Impact Market.

“EXHIBITOR PARTNER”: 2'950 CHF

- partner logo inserted in the conference brochure
- an exhibition space in the conference foyer for the duration of the conference to set-up your booth
- a personalised invitation to send to your contacts with a 50% discount for any registration from your contacts
- your Corporate Profile inserted on our web site with a link to your web site
- 3 complimentary conference invitations for your colleagues or clients (value: 2'100 CHF)
- the complete mailing list of the conference participants

“FIRST CLASS PARTNER”: 3'950 CHF

- a 30 minute non-commercial presentation as a speaker
- a personalised invitation to send to your contacts with a 50% discount for any registration from your contacts
- your Corporate Profile distributed to the participants
- 4 complimentary conference invitations for your colleagues or clients (value: 2'800 CHF)
- the complete mailing list of the conference participants

“SILVER PARTNER”: 5'950 CHF

- partner logo on front page of the conference brochure
- a 30 minute non-commercial presentation as a guest speaker with a formal introduction from the chairman
- lunch or cocktail hosted by your organisation (luncheon costs included in the total package of 5'950 CHF)
- partner's logo appears on the schedule in participant folders
- your Corporate Profile published on our web site and distributed during the conference
- a personalised invitation to send to your contacts with a 50% discount for any registration from your contacts
- 5 complimentary conference invitations for your colleagues or clients (value: 3'500 CHF)
- the complete mailing list of the conference participants

“GOLD PARTNER”: 7'950 CHF

- all the conditions applying to EXHIBITOR partnership, plus:
- partner logo on front page of the conference brochure
- lunch or cocktail hosted by your organisation (lunch included in the total package of 7'950 CHF)
- a 30 minute non-commercial presentation as a guest speaker with a formal introduction from the chairman
- 10 complimentary conference invitations for your colleagues or clients (value: 7'000 CHF)

“LEAD PARTNER”: 8'950 CHF

- all the conditions applying to GOLD partnership, plus:
- exclusivity of partnership to company's market sector

->The ESAFON Partners take in charge their travel and accommodation expenses

TO KNOW MORE, PLEASE EMAIL BACK THE HERERAFTER COUPON TO a.golbery@esafon.com



- Yes, I am interested by your Partnership opportunities. Please contact us to discuss further

First Name, Last Name:

Company Name:

Signature:

ESAFON BOARD MEMBERS



François Golbery, Chairman, ESAFON, Switzerland fgolbery@esafon.com

François Golbery is the Chairman of ESAFON, a not – for - profit independent association registered in the Registrar of the Federal Office in Bern with the objective of promoting and facilitating best practices within the Finance industry. At ESAFON, we are committed to help drive the impact agenda forward as we firmly believe that environmental and social unbalances - well described under the UN SDG's - need urgently to be addressed strategically and financially.

François strongly supports the development of a mainstream global impact capital market driven by investor's willingness and preference to achieve alongside financial returns, environmental and social returns as well.

Through ESAFON and its high profile expert network, Family Offices, strong drivers of Impact Investing, will learn how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment.

François is a Senior Managing Partner at MGFF Ltd, a global strategic advisor to Institutional & Private Investors involved in impact and sustainable investments.

Latest assignments include strategic advisory services to international timberland managers in fund set-up and profiling.

François has built –up a personal network of high calibre experts that are instrumental to forge the future during its tenure at MGI.

In 1988, he started-up and grew the French subsidiary of IIR, a US leading conference business organization in Paris as the most profitable entity of the group and was elected Manager of the Year in 1992 & 1993. He received his prize from Edward de Bono, the originator of the lateral thinking concept. Took over the overall responsibility of the Portuguese office and consequently had a team of 150 people under his responsibility.

He holds an MBA in Finance from the University of Hartford (Connecticut), under the patronage of Michel Barnier, former Commissioner of the Internal Market Division of the European Commission and now in charge of negotiating the Brexit for the EU.

François Golbery is a member of the Royal Ocean Racing Club in London.

François is a co-owner and an acTive manager in forestry assets.



Dr Anne Walhain Golbery, Senior Managing Director, ESAFON, Switzerland
a.golbery@esafon.com

Dr Anne Walhain Golbery is **Managing Director** and **Board Member of ESAFON**, a non-profit independent association started in 2001.

ESAFON new objectives from 2015 are to help **family offices, private and institutional investors** increase **access, scalability and effectiveness** of their **Global Impact Investments**.

Anne is **Managing Partner of MGFF Ltd**, a **global impact investment advisor** helping managers **structure impact investments**.

François & Anne are Partners in life and in business; Anne has been the co-founder of MGI Management Global Information SA, managing the global operations of MGI for 18 years. Previously, as **IT Program Manager**, Anne has been designing and implementing Technical Information Systems for the Space Electronic Equipments at **EADS**, France, for 12 years, from 1982 to 1994.

Anne held a **Doctorate in Atomic Physics**, University of Caen, France, 1979.

She enjoys doing business and sailing with François for 32 years. She has been racing as navigator on a One Ton sailing boat during the Fastnet Race 1979.

Anne is a co-owner and manager in forestry assets.

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

ESAFON 2017-2018



If you are an Asset Manager, a Fund Manager, the Head of a Family Office or a Strategic Advisor, join

ESAFON – The European & Swiss Network of Asset and Fund Managers, Family Offices and Strategic Advisors

ESAFON is a Swiss registered non-profit association located in Switzerland that includes **family offices, institutional investors and best in class experts** addressing **global strategic impact investment issues**.

With 100 honorary members, the primary objective for **ESAFON** in 2017-2018 is to help **family offices and institutional investors** increase **access, scalability and effectiveness** of their **Global Impact Investments**.

Thanks to **ESAFON** and its high profile expert network, Family Offices, strong drivers of Impact Investing, will learn **how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment**.

ESAFON members network with major international leaders through think tank meeting and social events.

Two past major conferences November 16th 2016 & May 18th, 2017 in Geneva have addressed global impact asset allocation across total portfolio.

The Global Impact Community will gather

April 19th, 2018 - Geneva

A major **ESAFON Global Impact Investing conference**

dedicated to **all those involved to expand the path of global impact investing**

ESAFON members will furthermore have access to the **GLOBAL IMPACT FAMILY OFFICE CO-INVESTMENT PLATFORM 2017** through the **ESAFON** website: www.esafon.com

- Their details are added to the **ESAFON DIRECTORY** which is updated on a monthly basis.
- They benefit from **one personal complimentary invitation to one ESAFON conference 2017** and from a **50% discount** on their registration fee to all ESAFON Conferences during one year.
- The Annual **Individual Membership Fee 2017-2018** is 400 CHF.
- The Annual **Institutional Membership Fee 2017-2018** is 900 CHF. It allows each Institution, Member of ESAFON, to register until 3 executives as ESAFON Members
- **ESAFON Honorary Membership**: this membership is restricted to the Donors willing to support the Association ESAFON for one year : from 1'000 CHF
- Please find ESAFON MEMBERSHIP APPLICATION FORM below.

For more information concerning ESAFON Membership, please contact:

Dr Anne Golbery, Senior Managing Director, **ESAFON** by either

e-mail: a.golbery@esafon.com, or **mobile phone:** + 33 6 45 83 67 67

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

To apply as ESAFON member, please return this form to ESAFON **by email:** a.golbery@esafon.com



ESAFON APPLICATION FORM 2017-2018

Name:

Job Title:

Company:

Address:

City & Zip-Code:

Country:

Telephone:

E-mail:

Yes, I wish to enter the non-profit Association ESAFON, The European and Swiss Network of Asset and Fund Managers, Family Offices and Strategic Advisers for one year 2017-2018
I am introduced by:.....

Yes, I send you a short biography by e-mail with a colour portrait to be published on the private ESAFON website 2017

Annual Individual
Subscription
2017-2018

(400 CHF)

Annual Institutional
Subscription **2017-2018**
Until 3 members (900 CHF)

Annual Honorary
Membership **2017-2018**
Donor :.....

(from 1'000 CHF)

Yes, I will send you the payment upon receipt of your invoice

Date:

Signature:

GLOBAL IMPACT INVESTING

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors
 Conference – April 19th, 2018 – Mövenpick Hotel - Geneva

How to Register:

Please send back this Form fulfilled and signed to our Customer Service at customer.service@esafon.com

CONFERENCE: (cpe: 8 hours)

04.10.2017

Title: IMPLEMENTING A GLOBAL IMPACT INVESTMENT STRATEGY

Date: April 19th, 2018

Conference Code: C1820

Conference Venue: Mövenpick Hotel, Geneva
www.movenpick.com

This 5 Business Hotel is very closed to the Airport and has a free shuttle available every 20 min for its clients*

REGISTRATION:

Name First Name

Position

Company

Address.....

E-mail.....Tel.....

IMPLEMENTING A GLOBAL IMPACT INVESTING STRATEGY	Fee includes Refreshments, Buffet Lunch, a Full Documentation Package including the CD ROM of the speaker presentations
<input type="checkbox"/> Yes, I wish to register * April 19 th , 2018, Mövenpick Hotel, Geneva - Code C1820	
<input type="checkbox"/> Yes, I wish to book a room at Mövenpick Hotel At the special ESAFON rate of 220 CHF	
<input type="checkbox"/> Standard Registration Fee	700 CHF
<input type="checkbox"/> Special Early Registration Fee for Registration & Payment by October 30 th , 2017	500 CHF
<input type="checkbox"/> Special Early Registration Fee for group of 2 persons and more, for Registration & Payment by October 30 th , 2017	400 CHF per delegate
<input type="checkbox"/> Yes, I wish to order a CD ROM of the speaker presentations of the past Global Impact Investment Strategy conference, May 18 th , 2017	100 CHF
Date:	Signature:

*Please tick the applicable box

Yes, I will pay by wiring transfer upon the receipt of my invoice

Please send the invoice to the following address:

Name, Job Title:.....

Address:.....