

Impact Investing

Structure and content

Introduction to impact investing

This part provides an overview of impact investing with the following topics:

- Why invest with impact?
- What is impact investing? (investment continuum, criteria, scope)
- How is impact assessed and managed?
- Impact investment market (key investor groups and their motivations)
- Key impact investment myths

Investing with impact

- Additionality, maximization and measuring of impact
- Types of impact, investor contribution
- Investing in impactful companies vs. being an impact investor: what is the difference?
- How to swap out traditional investments for sustainable and impact investments

Stewardship and engagement

Impact generating investment strategies have different drivers. The Driver "engage for impact" is considered during the session. That way, "impact" is primarily defined by either successful risk management or by driving positive social change. These two impact aspects are looked at in more detail. Firstly, (ESG) risk identification, assessment and mitigation by means of engagement are addressed. Secondly, concrete SDG-aligned impact engagement programmes are considered.

Who should attend?

Financial analysts
Asset managers
Portfolio managers
IT specialists
Law and compliance experts
Financial market operators
Wealth managers
Client advisors

Language

English

Date

May 19, 2021

Time

13:00 – 17:00

Place

ONLINE Seminar

Seminar fees

SFAA members' attendance is free of charge.
For non SFAA members the fee is CHF 480.-and includes documentation.

Registration

Online on www.sfaa.ch/fr/SFAA_agenda.asp

Information

For more information, please contact us at:
AZEK AG, Feldstrasse 80, 8180 Bülach, Switzerland
campus@azek.ch
T+41 44 872 35 35

Speakers



Julia Balandina Jaquier

Julia is a leading independent impact investment expert and a trusted advisor to global families of wealth, banks and governments. With 20+ years of hands-on experience, Julia has facilitated the implementation of a broad range of mission-driven investment programs and funds for private, institutional, and sovereign investors. She is the founder of JBJ Consult and of KATALYST, author on impact investment, lecturer at business schools and universities and moderator at industry forums. Julia began her career at McKinsey in 1993 and subsequently held senior positions at ABB Financial Services and AIG Global Investment Group.



James Gifford

James Gifford is the Head of Impact Advisory for Credit Suisse, working with the bank's clients and advisors to mobilize capital into impact investing. He was the founding Executive Director of the UN Principles for Responsible Investment. Other roles include Head of Impact Investing at UBS and Director of Impact at TAU Investment Management. James has a PhD from the University of Sydney on the effectiveness of shareholder engagement in improving corporate behavior.



Florian Heeb

Florian is a researcher at the Center for Sustainable Finance and Private Wealth (CSP) at the University of Zurich. He explores the real-world impact of sustainable investing and how investors integrate impact into their decision-making. Before, Florian served on the executive board at South Pole, a market leader in carbon trading and sustainability consulting and previously at myclimate, ProNatura, and the Swiss Federal Institute of Aquatic Science and Technology. He holds an MSc in Environmental Science from ETH Zurich.



Karsten Güttler

Karsten Güttler is an ESG investment specialist in UBS AM. He represents the ESG capabilities to institutional investors and develops new ESG solutions. Prior to joining UBS AM, he was the head of UHNW sustainable investing distribution in UBS Wealth Management. Before joining UBS in 2011, Karsten worked for Commerzbank, the Boston Consulting Group, and Credit Suisse. He holds a MSc in Business Administration and a PhD in Entrepreneurship.