



Impact Investment Summit MasterClass Program

Location: International Towers Exchange Place Tower Three,
300 Barangaroo Ave, Sydney.

29 March 2023: Impact Interactive Summit Masterclasses

MORNING SESSIONS 9AM – 12PM

Introduction to Impact Investing



Zameen Pavri is a Partner and Chief Impact Officer of SDGx – a technology funds management and impact advisory firm, where she manages a global climate technology fund, across Asia, Australia and EU. She also currently is the Oceania Regional Head for the Global Impact Investing Network (GIIN) and serves on a variety of fiduciary and non-fiduciary boards. She has a multi-dimensional background spanning over 28 years across ethical and impact investing, venture capital, funds management and includes having international development experience, working as Impact Fund manager for DFAT’s social impact accelerator fund. Prior to her career transition into the impact investing arena, she held several senior executive leadership positions within leading investment management firms within the equities and alternatives space.

Objective: Introduction to impact investing

Take-outs for attendees:

- Why impact matters.
- What is impact investing
 - Definitions and differentiators from other Responsible Investment approaches.
 - Types and styles of RI and impact – ESG vs Exclusions vs Impact, etc; Impact 1st vs Finance 1st
 - Impact landscape, market size, growth and outlook.
 - Impact frameworks – assessment
 - Performance – myth busting re performance
 - Outlook – where is impact headed – opportunities and challenges ahead.

Target audience:

- All people new to impact investing – investors (retail, wholesale, institutional), advisers, clients, impact companies.

Impact investing for wealth advisers



Dan Simpson is Head of Portfolio Management and Impact Investment at ANZ Private Bank. This role entails building impact investment portfolios for his clients, which allow them to meet their investment objectives whilst funding initiatives that benefit society and the environment. Dan completed the UNPRI Academy Foundations in Responsible Investing program in 2020, is a CFA Charterholder, and has a B.A. in Economics and History from Otago University, NZ.

Objective: Getting wealth advisers comfortable with allocating to impact investments

Take-outs for attendees:

- Meeting client needs; and assessing risk appetite in a changing world.
- Understanding ESG vs Impact.
- Understanding the obstacles clients face in considering impact investments, and emphasising the benefits.
- Learn different adviser experiences in advising their clients on impact.
- Impact investments in client portfolios across asset classes – funds, direct assets.
- Educating yourself, educating your clients.
- Journey to Impact Case studies: hear from Wealth clients and learn how they got comfortable with impact investing.
- Customer/client research on rising demand for impact.
- Impact themes – past, present, future.

Target audience:

- Advisers and investors new to impact investing, or wanting to expand their knowledge.

LUNCH 12PM – 1PM

AFTERNOON SESSIONS 1PM – 4PM

Journey to Impact – How to build your impact portfolio



Danny Almagor, with his wife Berry, leads Small Giants, a company dedicated to creating social and environmental change through business, education and storytelling, and Australia's first B Corporation.

From investments in start-ups such as Bureo, The Great Wrap and Future Super to larger-scale projects such as solar farms, green buildings and regenerative agriculture, the Small Giants total portfolio approach proves that impact investing can span all asset classes and achieve both profit and purpose.

Danny was the inaugural Social Entrepreneur in Residence at RMIT, the founder and former CEO of Engineers Without Borders Australia and is the co-founder and Chair of the Impact Investment Group, and more recently created Sentient Impact Group. He has founded over a dozen for profit and non profit

organisations including The Sociable Weaver, The Impact Club, Beyond Family Office and Beyond Creative. He has served on numerous boards, including many of the Small Giants family of businesses such as Tom Organic, The School of Life, The Cape ecovillage and Pacific Biotechnologies, as well as non-profit boards and advisory boards including the Jewish Museum of Australia, Stand Up, Smiling Mind, The Gross National Happiness Centre in Bhutan and Toniic. Danny has been recognised through many awards including a Churchill Fellowship, RMIT Alumnus of the Year, EY Social Entrepreneur of the Year, UN PRI Social Investment Pioneer and the Medal of the Order of Australia.

Objective: Understanding how to design an impact strategy and integrate it into your investment portfolio.

Take-outs for attendees:

- Designing your impact strategy.
- How to start and build your impact portfolio.
- Portfolio transition from 0%-100% impact across asset classes.
- Navigating risk, return and impact.
- Product choices – direct investing and funds across asset classes.
- Blockages and myths to bringing in impact.
- Impact assets – Key risk and performance attributes.
- Reporting impact.

Target audience

- Investors looking to bring impact into their portfolios.

Impact Investing - Best Practice in Action



Jessica Mendoza-Roth is the Founder and CEO of the Social Impact Hub. The Social Impact Hub is a purpose-driven intermediary that collaborates with a broad range of changemakers. Through advice, education, mobilising capital and ecosystem building, we build capacity to amplify impact. Jessica is also a consultant to the impact investment sector, having served as the Impact Strategist for Blue River Group, an independent impact investment services firm, and opened the Sydney office of Impact Investment Group. Previously, Jessica was a Solicitor at King & Wood Mallesons in Sydney. She holds a B.A. and LL.B. (with First Class Honours) from UNSW and a LL.M. from Harvard Law School, where she was the recipient of the R.G. Menzies Scholarship to Harvard, and she studied social entrepreneurship, philanthropy and impact investing.

Objective: Featuring the winners and finalists from 2022's Impact Investment Awards, the session will showcase best practice both from the perspective of impact asset managers and impact asset owners.

The masterclass will reveal insights on;

1. designing a best practice impact investment strategy;
2. building a best practice portfolio;
3. managing & measuring impact and what best practice looks like.

Takeout's for attendees:

- Hear from leading impact investors about how they design, build and implement their impact investment portfolios;
- Learn how to find and assess impact investments to build a best practice portfolio;
- Learn how to measure and manage impact;
- Connect and network with other impact investors and advisors;
- Access key resources that you can use after the masterclass to support your impact investing journey.

Target audience

- All people in impact investing, both new to the sector and established professionals – investors (retail, wholesale, institutional), advisers, clients, impact companies, consultants.