

# The climb to the new view

## Coronavirus crisis – wider perspectives



# Day one – The big picture

## Session 1. Re-imagining the future

- Martin Rich, Future-Fit Foundation

## Session 2. Putting the person into the big picture

- Sarah Maynard, CFA Institute

## Session 3. Diversity in the spotlight – are we equipped for a virtual workplace?

- Rekha Misra, Willis Towers Watson



# Day 2: Disrupt or be disrupted – developing adaptive investment organisations

## Session 1: Viewpoints: reflections from asset managers and asset owners around the world

Zoe Alexander, NEST

Sue Brake, Future Fund

James Davis, OPTrust

Alva Devoy, Fidelity International

Eoin Murray, Federated Hermes International

Jaco van der Walt, RBC Global Asset Management



## Session 2: Consultants under challenge

- Luba Nikulina, Willis Towers Watson and Mitesh Sheth, Redington



## Session 3: The power of culture

- Roger Urwin, Thinking Ahead Institute

# Day 3: Confronting new realities about resilience and sustainability

## Session 1. Overall impact on the investment industry

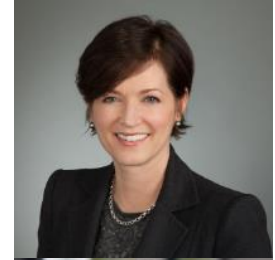
- Margaret Franklin, President and CEO, CFA Institute

## Session 2. How sustainability must confront new realities

- Russell Picot, Special advisory to the TCFD; Director of LifeSight;

## Session 3: Spotlight session on climate risk

- Matt Scott, Senior Director, Climate and Resilience Hub at Willis Towers Watson



# The climb to the new view

- Systems perspectives
- Scenarios, likelihoods, impacts
- The soft stuff is the hard stuff
- Adapting and pivoting
- Innovation and managing change
- Resets – climate, inequality, capitalism?



# Institute members

2015



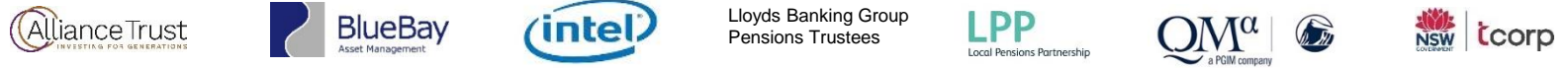
2016



2017



2018



2019



2020



# Follow us, engage with us, join us

## Follow us

LinkedIn: Thinking Ahead Institute | Twitter: @InstituteTAG;

## Engage with us

### Research

- Sustainability and climate change
  - 1.5c portfolio working group
  - Duty of ownership working group
- Best practice investment committees
- The power of culture
- Total portfolio approach

## Join us

### Sign up for communications

- Memo – member newsletter
- Grapevine – friends newsletter

### Membership

- Visit our website [Thinkingaheadinstitute.org](https://Thinkingaheadinstitute.org) for more detail

### Thinking Ahead Institute



This edition of Memo includes our updated research into organisational culture and a unique global peer study which aims to explore the power of culture in investment organisations. Do let us know if you have any feedback.

**Feel free to forward**  
Please share this with your colleagues. If you have been forwarded this email and want to receive it in future, subscribe here.

### Thinking Ahead Institute



Hello friends of the Institute and welcome to the new look Grapevine, your quarterly newsletter to update you on our latest research. Do let us know what you think. For more regular updates on our research and events follow us on social at @InstituteTAG and Thinking Ahead Institute.

**Feel free to forward**  
Please share this with your colleagues. If you have been forwarded this email and want to receive it in future please subscribe here.

### New research



**What is effective culture?**  
Culture is a unique ingredient in the struggle for competitive advantage among institutional investment organisations. There are ways for culture to be managed and developed over time but it will take focus, patience, leadership and

### Join us

Make sure you have a representative at our upcoming sustainability events in London and Melbourne.

**Short on time?**  
Try our latest articles and podcasts

### New research



**Sustainability**  
As part of our research into sustainability in the investment industry we have recorded two video series. **Routes to action**, conversations with investment practitioners around the world, and **Purpose and value in the investment industry**.

### Events

Make sure you have a representative at our upcoming Thinking Ahead breakfast event in London.

**Podcasts**

- Culture in the investment industry
- Investment objectives

## Thinking Ahead Institute

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### The climb to the new view A virtual seminar series

Covid-19 has vividly reminded us of how interconnected social, environmental and economic issues are. This massive, systems-level disruption has left many investment organisations feeling as if they have been thrown into a deep pit with no clear way out. In this virtual seminar series, featuring leading investors from around the world, we explore steps to climb back up together to a 'new view'.

Find out more



### Covid-19 research and materials

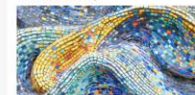


Coronavirus coverage

### About the Thinking Ahead Institute

The Thinking Ahead Institute is a global not-for-profit group whose aim is to influence change in the investment world for the better by improving the provision of savings. The Institute's members comprise asset owners, investment managers and other groups that are motivated to influence the industry for the good of savers worldwide. It has over 40 members with combined responsibility for over US\$42 billion and is an outgrowth of Willis Towers Investments' Thinking Ahead Group. For further information please see our 2020 research agenda, download our brochure or read an overview. Join our community by following us on Twitter

### Global peer study



The power of culture