

# Thinking Ahead Institute | Member briefing 2024

30 January & 1 February



## Last year, we produced...



**8 research  
papers**



**5 global  
studies**



**9  
podcasts**



**21  
insights**



**409  
press articles**



**39,200  
unique visitors**



**25 events**



**22 conferences**

...and worked with



**Thinking Ahead Institute**  
An innovation network founded by WTW

# Today's agenda

Mobilising capital for a sustainable future



**Welcome**

**Our big themes from 2023 & 2024**

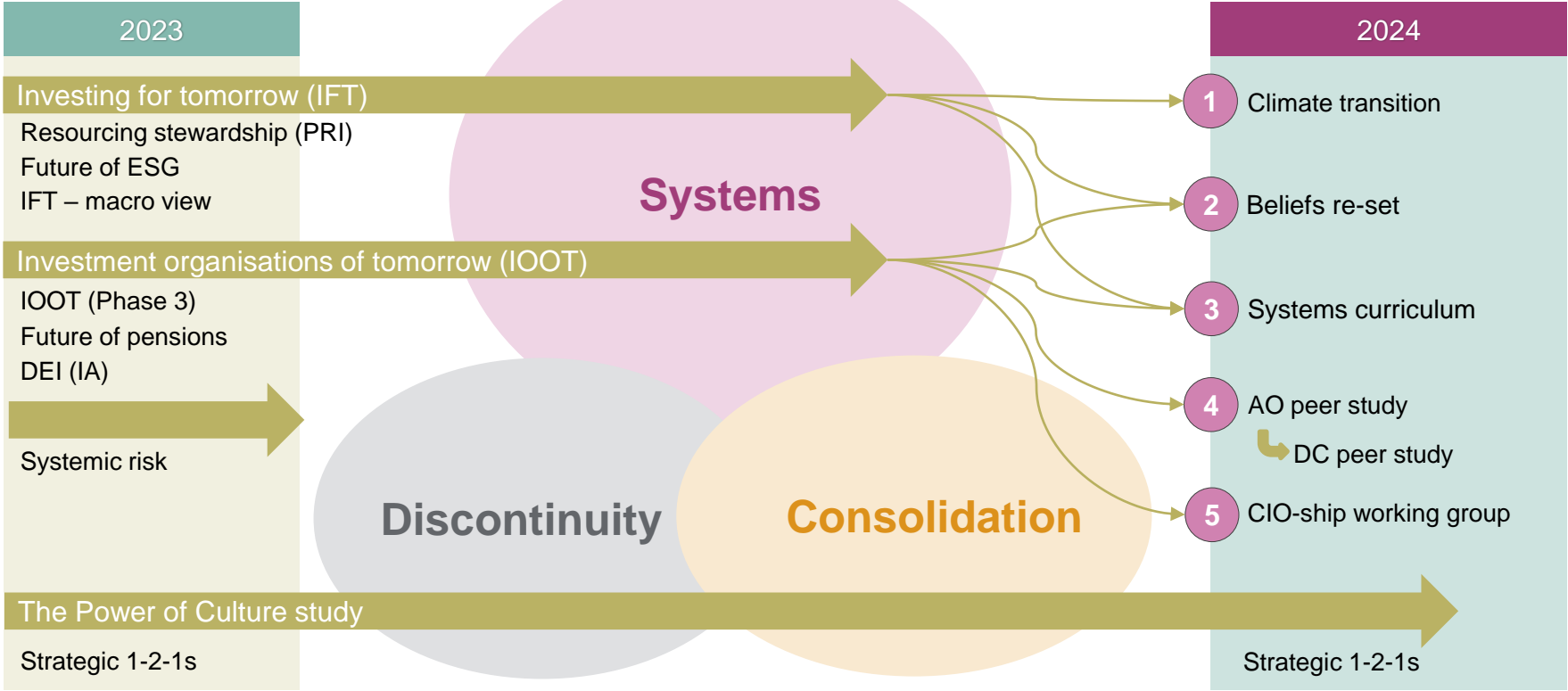
**2024 research plans and how to get involved**

**Making the most of your membership**

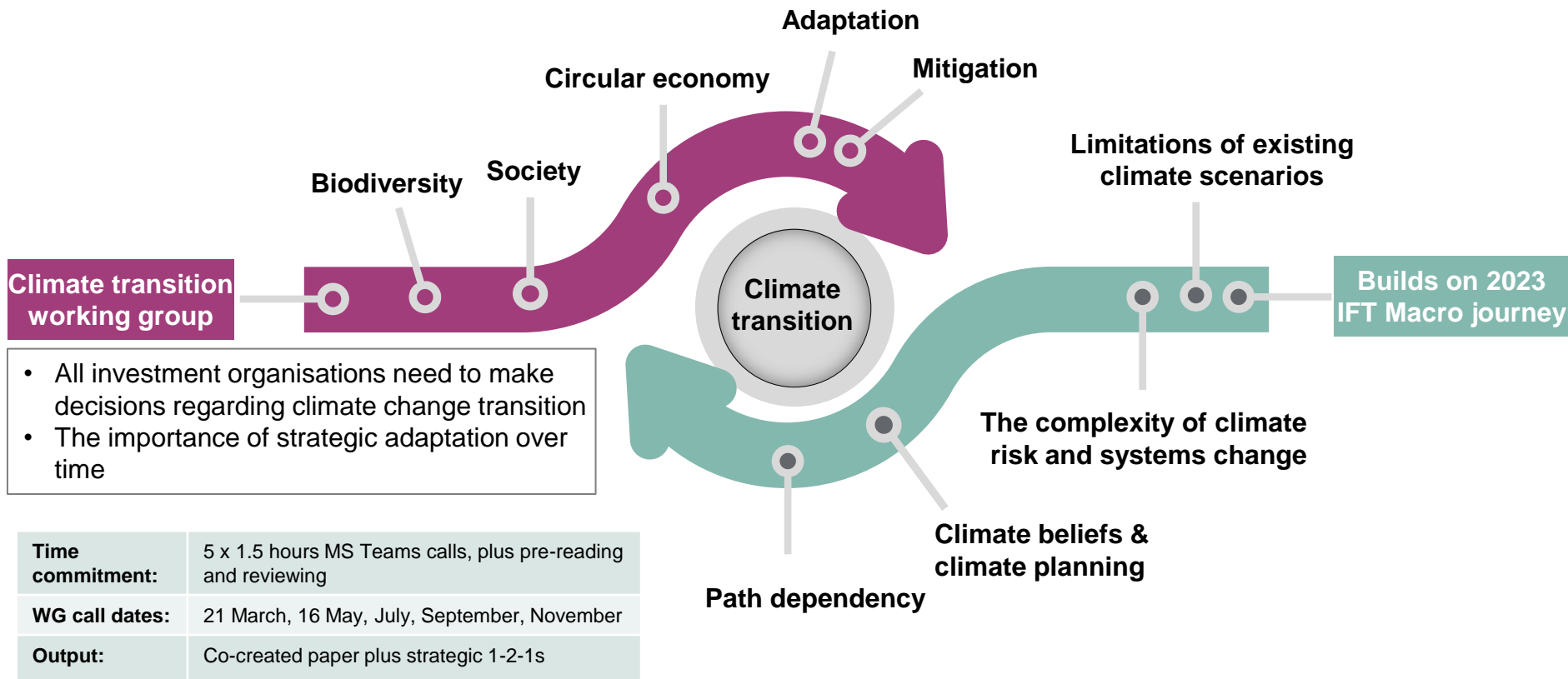
**Q&A**

**Wrap up**

# Big themes linking recent and future research journey



# Climate transition working group



# Investment beliefs working group



Initial sprint

June onwards

Strategic 1-2-1s

We know more about:

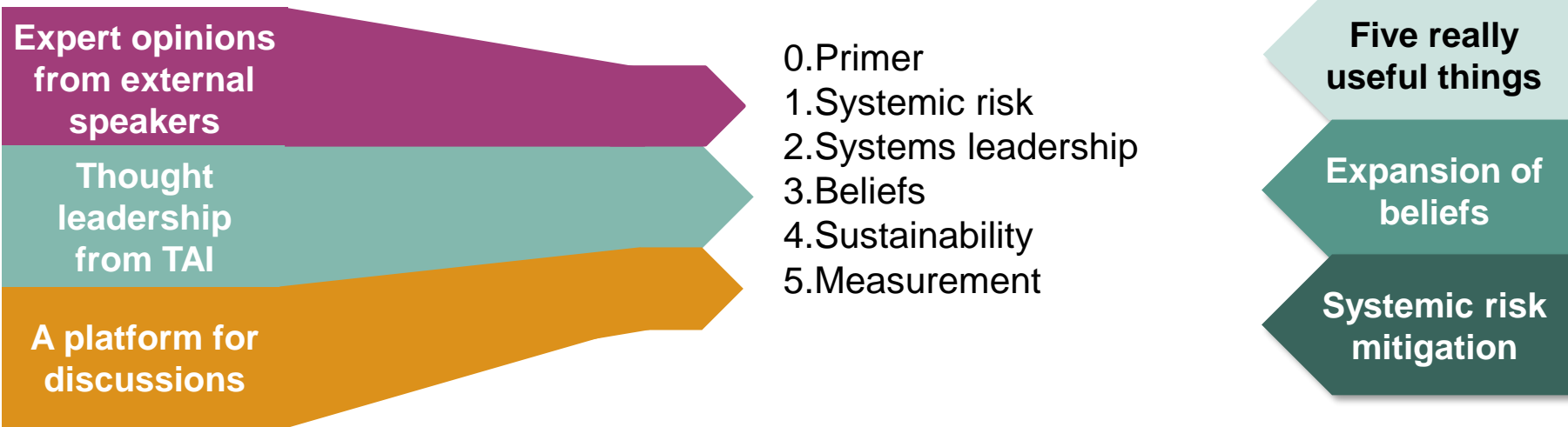
- systems
- systemic risk
- climate / biodiversity / inequality

Are our organisations on top of this progress?

<b>Time commitment:</b>	3/4 x 1.5 hours MS Teams calls, plus pre-reading and reviewing
<b>WG call dates:</b>	29 Feb, 26 March, 25 April, (23 May)
<b>Output:</b>	Co-created survey and workshop design

# Systems curriculum - enhancing system thinking in your organisation

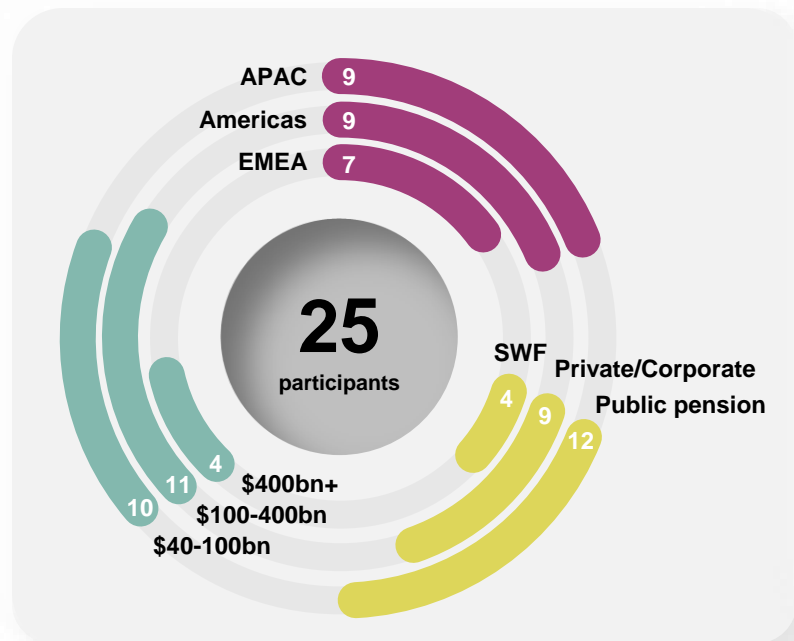
## Curriculum program



<b>Time commitment:</b>	6 x 1.5 hours MS Teams calls, plus pre-reading
<b>Session dates</b>	April, June, September, October, November, December
<b>Output</b>	Training materials, strategic 1-2-1s

# TAI & Future Fund | Global Asset Owner Study 2024

## Peer group



## Objectives

- Make comparisons of leading AOs
- Convene CEO/CIOs to discuss industry issues
- Facilitate sharing best practices among peers
- Explore competitive edge investment strategies
- Enable and explore AOs collaboration
- Elevate industry systems thinking

## Content

Governance & Culture

Portfolio management

Investment values/beliefs

Operational aspects

Sustainability

Technology & data

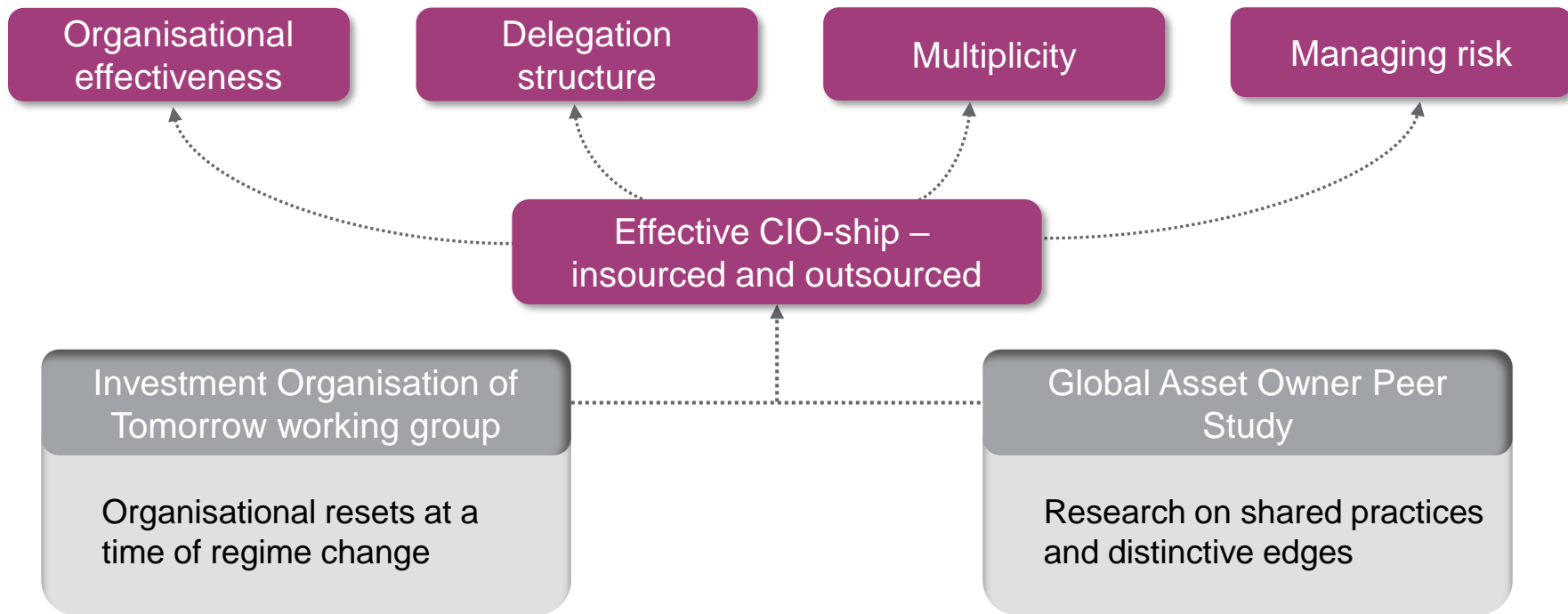
**In-person events:** 20 March in London, others in planning

**Output:** Study report capturing findings from quant survey, deep-dive interviews, research and analysis of best practices



## CIO-ship working group

<b>Time commitment:</b>	4 x 1.5 hours MS Teams calls, plus pre-reading/ reviewing
<b>WG call dates:</b>	September, October, November, December
<b>Output:</b>	Global learning, co-created report, best practice actions



## Strategic 1-2-1s

Strategic 1-2-1 topics	
Stewardship and engagement	Total portfolio approach
Three-dimensional investing	Long-horizon investing
Decision making	MPT vs systems thinking
Investment organisations of tomorrow	Mega trends and industry of the future
Systemic risk	Organisational identity
Leadership	Investment governance
Asset classes of tomorrow	Management of measurement
Investment professional of the future	Investment technology of the future
Sustainability	



<b>Time commitment:</b>	1.5- 2 hours per session
<b>Dates</b>	Throughout the year
<b>Workshop process</b>	<ol style="list-style-type: none"> <li>1. Survey</li> <li>2. Facilitated workshop</li> <li>3. Report back</li> </ol>

# Make the most of your membership

Engagement, impact and planning



## Making the most of the year

1. Join a working group

Send us your relevant research

2. Update member contact list

Memo

3. Discuss your one-to-one project with us

[Overview + workshops](#)

4. Check out our [website](#)

Link it to yours

5. Hold dates for our [events](#)

Tell us about your events

Contact us any time!

# What to expect in 2024

## In-person events

### Exchange +

*Asset owner peer study  
on beliefs & best practices*  
London | 20 March

### MiX Dinner

North America | 23  
September

### MiX Dinner

London | 22 April

### MiX Dinner

Asia | November

### Australia

*A series of member-only  
and public events*  
Australia | May

### Network+

*A series of rapid-fire talks*  
London | November

### Society+

*Film night*  
London | 27 June

### iX Dinner

Australia | December

### Autumn drinks

London | September

## Virtual events

### 2024 Member Briefing

30 Jan West | 1 Feb East

### Systems curriculum

April, June, Sept, Oct,  
Nov, Dec

### Perspectives +

*Professionalism and  
purpose*  
17 April

### Peer +

*Topic: TBC*  
21 May

### Peer +

*Topic TBC*  
October

## And more



### Podcasts

Investing for Tomorrow



### Memo

Research agenda,  
events, latest papers



Find us here

## Q&A



# Limitations of reliance and contact details

## Limitations of reliance – Thinking Ahead Group 2.0

This document has been written by members of the Thinking Ahead Group 2.0. Their role is to identify and develop new investment thinking and opportunities not naturally covered under mainstream research. They seek to encourage new ways of seeing the investment environment in ways that add value to our clients.

The contents of individual documents are therefore more likely to be the opinions of the respective authors rather than representing the formal view of the firm.

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