

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



ShareAction»



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

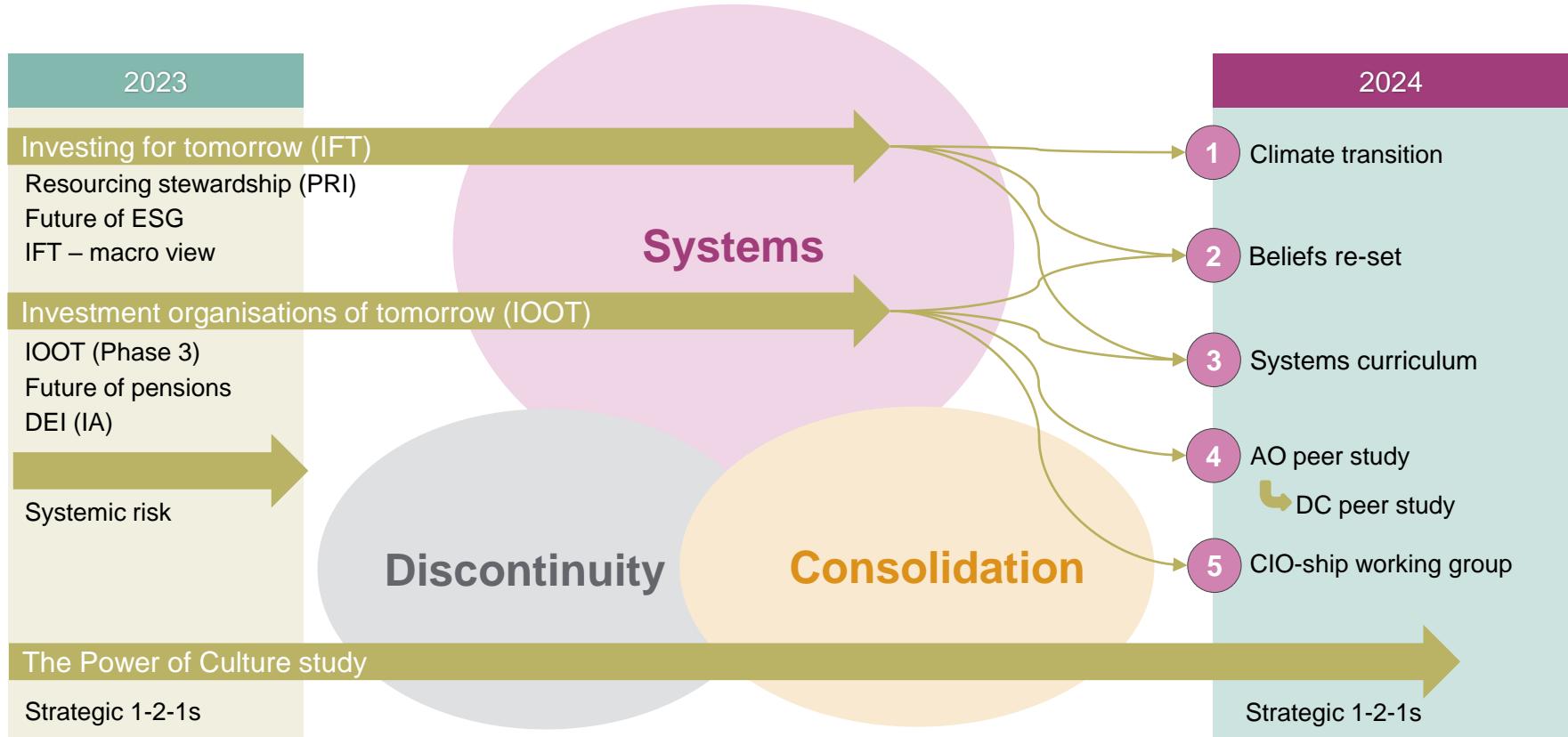
2024 research plans and how to get involved

Making the most of your membership

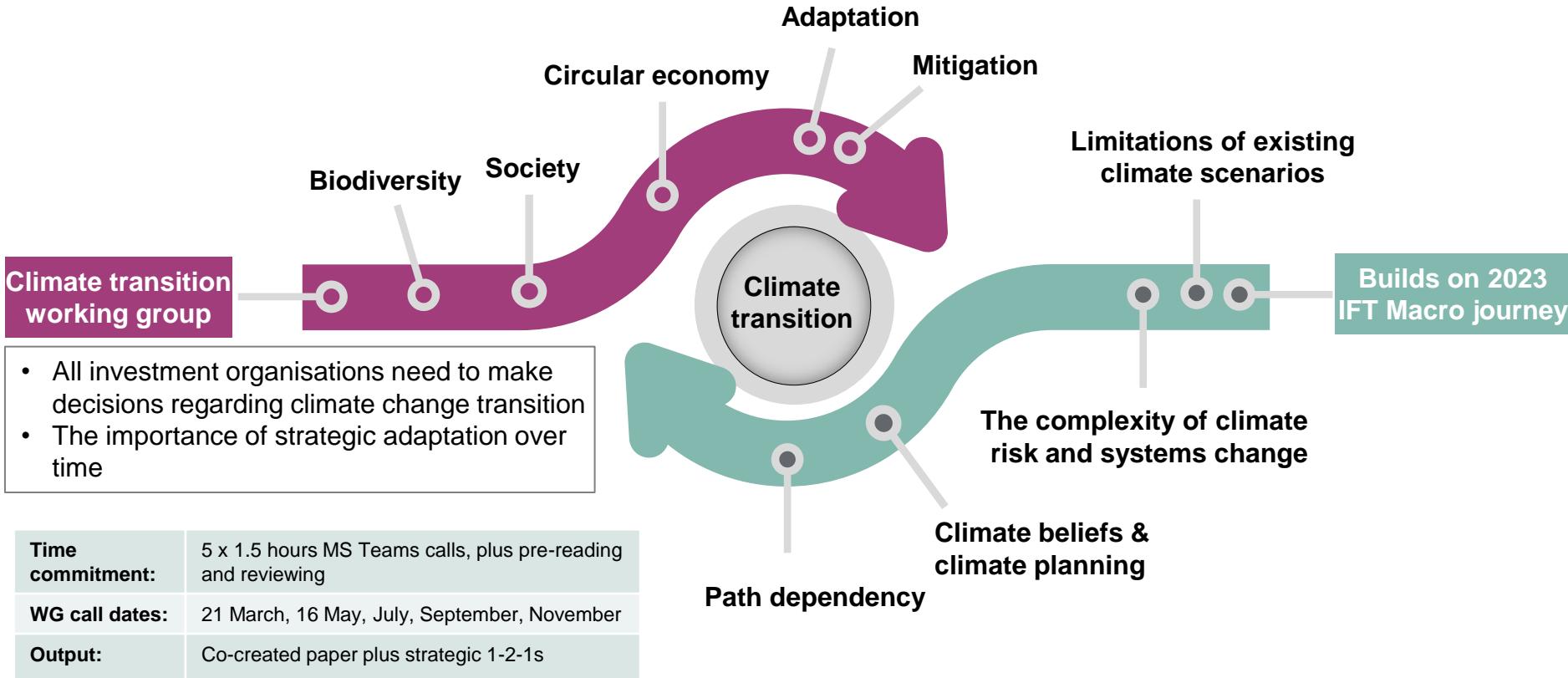
Q&A

Wrap up

Big themes linking recent and future research journey



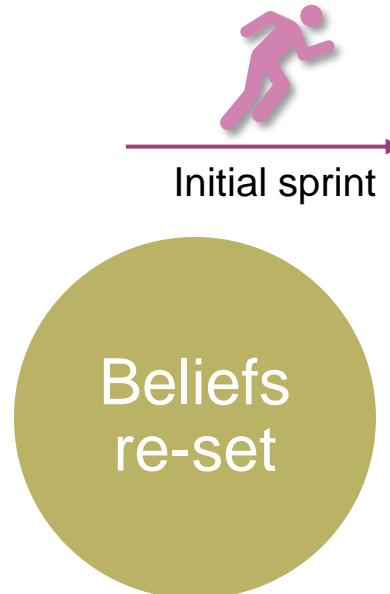
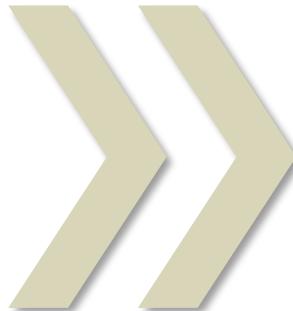
Climate transition working group



Investment beliefs working group



Working group



June onwards

Strategic 1-2-1s

We know more about:

- systems
- systemic risk
- climate / biodiversity / inequality

Are our organisations on top of this progress?

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

Systems curriculum - enhancing system thinking in your organisation

Expert opinions
from external
speakers

Thought
leadership
from TAI

A platform for
discussions

Curriculum program

- 0.Primer
- 1.Systemic risk
- 2.Systems leadership
- 3.Beliefs
- 4.Sustainability
- 5.Measurement

Five really
useful things

Expansion of
beliefs

Systemic risk
mitigation

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

TAI & Future Fund | Global Asset Owner Study 2024



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

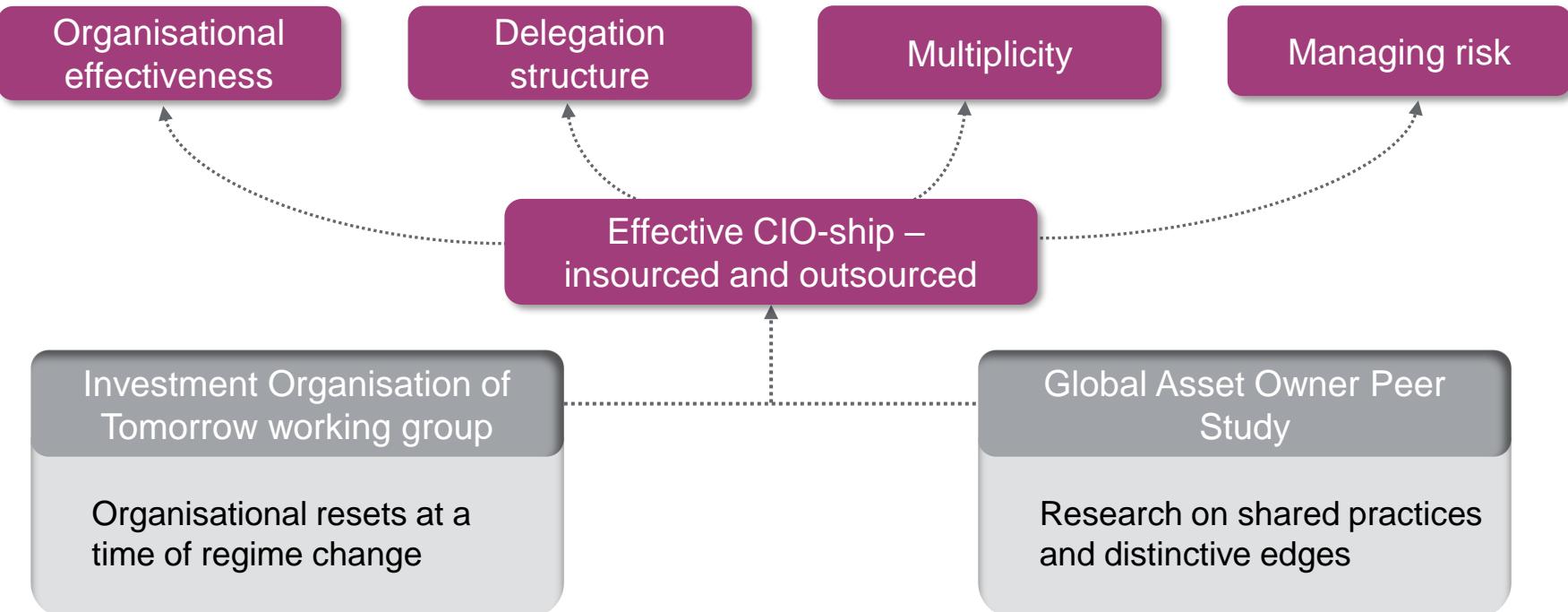
Technology & data

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

Time commitment:	4 x 1.5 hours MS Teams calls, plus pre-reading/ reviewing
WG call dates:	September, October, November, December
Output:	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	



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

Make the most of your membership

Engagement, impact and planning



Making the most of the year

1. Join a working group
2. Update member contact list
3. Discuss your one-to-one project with us
4. Check out our website
5. Hold dates for our events

Send us your relevant research

Memo

Overview + workshops

Link it to yours

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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