

Thinking Ahead Institute | Overview

July 2025



Join our community of investment changemakers

Our story

Led by Marisa Hall, alongside co-founders Roger Urwin and Tim Hodgson, the Thinking Ahead Institute connects asset owners, asset managers and service providers from around the investment world to harness the power of collective thought leadership and develop innovative solutions for the investment industry.

Watch our short video.
Meet our team.



Who we are

A member-driven research and innovation partner with a change agenda



Purpose

To mobilise capital for a sustainable future



Mission

To transform the investment industry through innovation—ensuring capital deployed and managed creates lasting value for savers, society and the planet



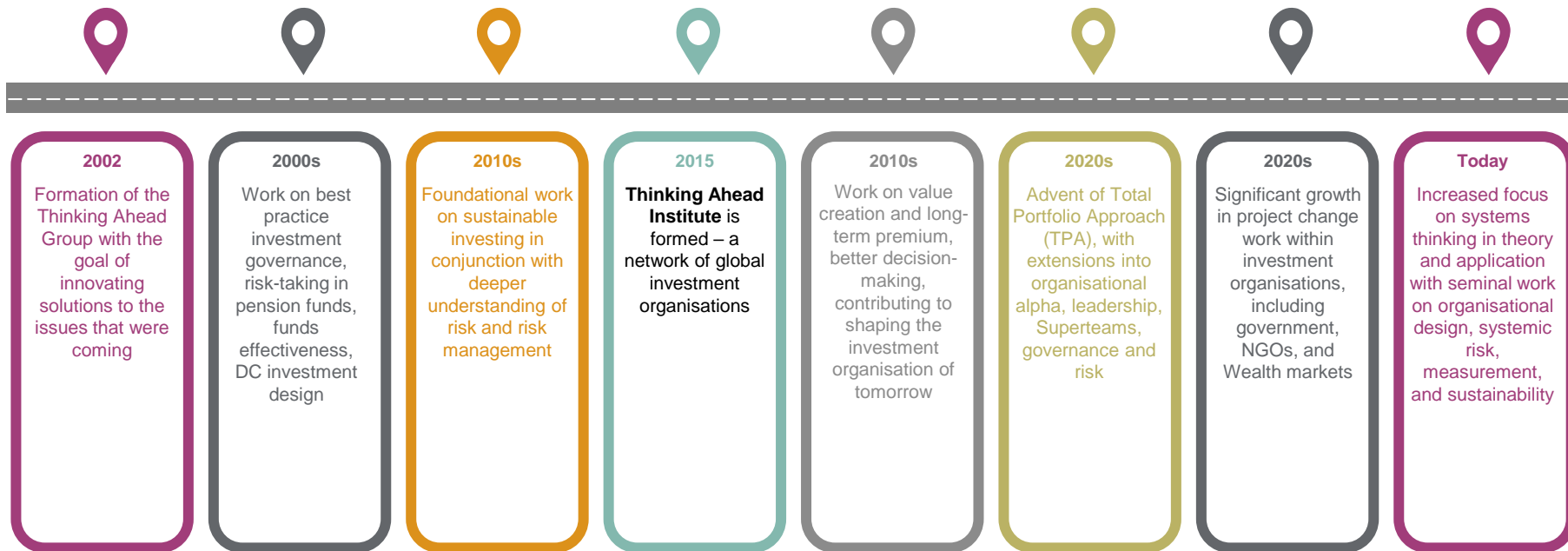
Vision

To shape a sustainable investment industry that creates lasting value for savers and a more liveable world

We're **investment specialists** with **150 years** of combined experience, bringing **deep insights** from global best practice at **leading organisations**.

Where we've come from

Our story



Our foundation and why we exist

A member-driven research and innovation partner with a change agenda



What we deliver



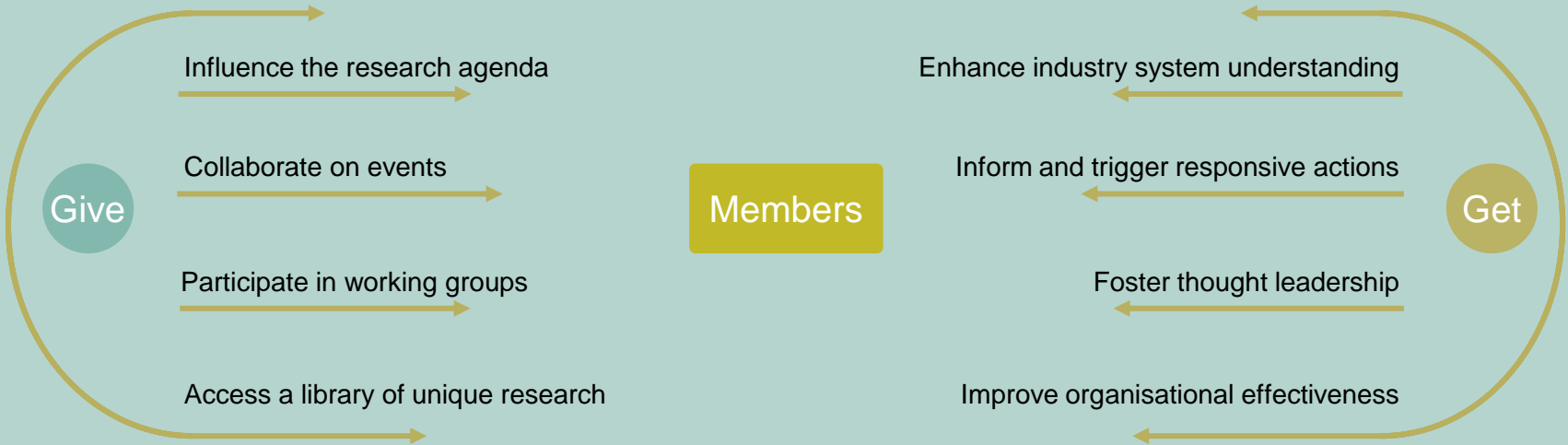
“You opened my eyes in so many ways. I learnt about another way of thinking about sustainability, about group dynamics and teams, about posing challenging questions, about how to create a special work environment. And I feel very happy to be part of it now.”

- TAI member

Engaging with our members

Research, workshops, events and proprietary tools

- Institute members are central to our research process, fostering collaboration and thought leadership
- Members' contribution is the best win-win output of the Institute maximised by the give and get attitude



What's included in the membership?



Tailored 1-2-1
engagement sessions for
your organisation



Collaborate directly with
global members of TAI's
network



Unlock exclusive
research not available to
the public



Join dynamic virtual
events, in-person global
events and workshops



Join research working
groups with global peers



Use our proprietary
tools



Enjoy exclusive discounts



Unlock news and insights

Get a taste of us

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about us, take a peek at what's
readily available before becoming
a member...

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Our members | 36 asset owners | 14 asset managers

2015	2016/2017	2017/2018	2018/2019	2020	2022	2022	2024
        	     	      	      	       	     	     	       

* Previously QSuper

In the last 12 months...



Examples of TAI projects



Governance

Review governance design and compare with a best practices model

Risk 2.0
Fiduciary duty
Org design

Enhanced effectiveness
in decision making



TPA

Assess current investment framework to enhance TPA thinking and practice

TPA spectrum
Investment model
Joined-upness

Greater alignment with
investment goals



Investment beliefs

Beliefs review to reflect evolving priorities, remain practical and compare with peers

Balanced scorecard
Org alpha
Portfolio construction

Produce practical,
decision-oriented
principles



Alts-Plus

Optimise alternative investments; higher allocations, greater diversity, and strengthened partnerships

Asset allocation
Resourcing
Risk drivers

A more intelligent
system to manage
alternative mandates



Soft stuff

Soft stuff is the hard stuff; align organisational superpowers through collaboration and systems thinking

Culture & Superteams
HI x AI
Talent

Greater joined-upness between
people, process and
technologies

What's next? Engaging with us

**Thinking
Ahead
Institute**

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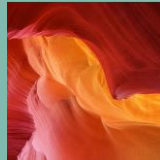


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Limitations of reliance – Thinking Ahead Group 2.0

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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