

# 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



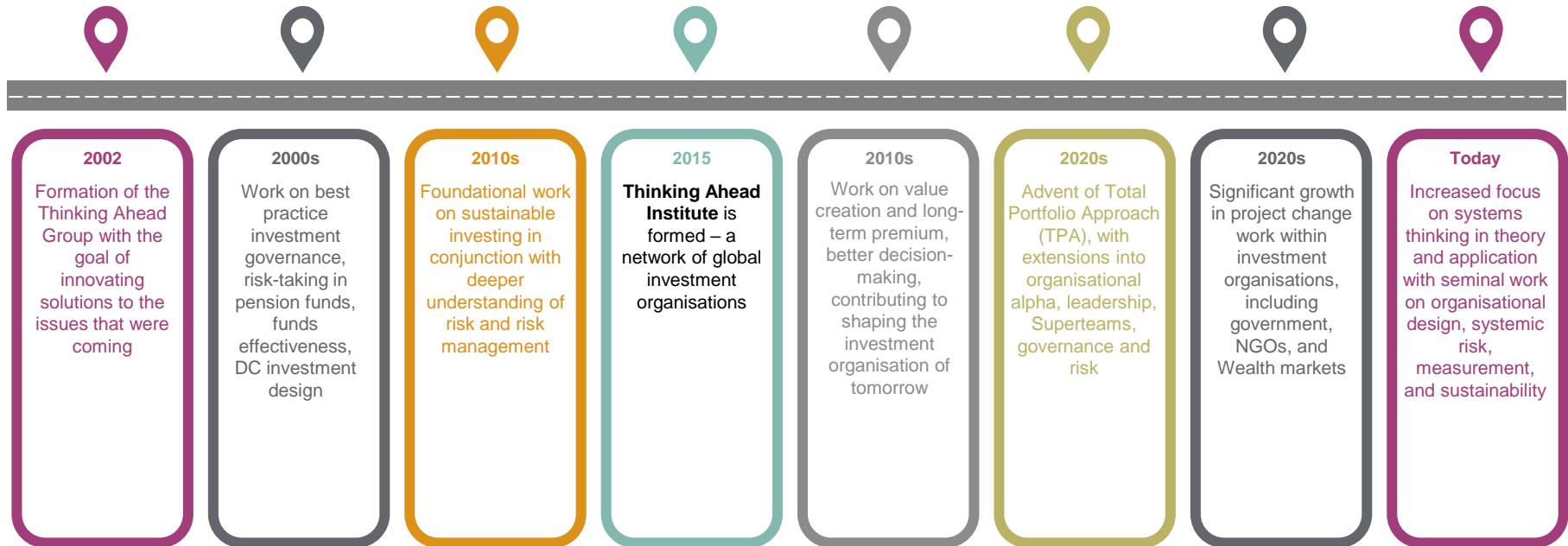
## Vision

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

## Our foundation

1

The Institute is rooted in the firm belief in the value and power of thought leadership, research and collaboration with innovative partners in the investment industry.

Investment hinges on a good understanding of the future.

## Strategic focus

2

- Building societal trust
- More robust investment strategies
- Better organisational effectiveness
- Organisations need and value thought leadership in: culture & diversity; systemic risks; organisational alpha; sustainability; governance

## Impact delivery

3

- Tailored 1-2-1 sessions with leadership teams
- Original research in working groups
- Member training, workshops and proprietary tools
- Investment industry change advocacy
- Event hosting and collaboration

# What we deliver



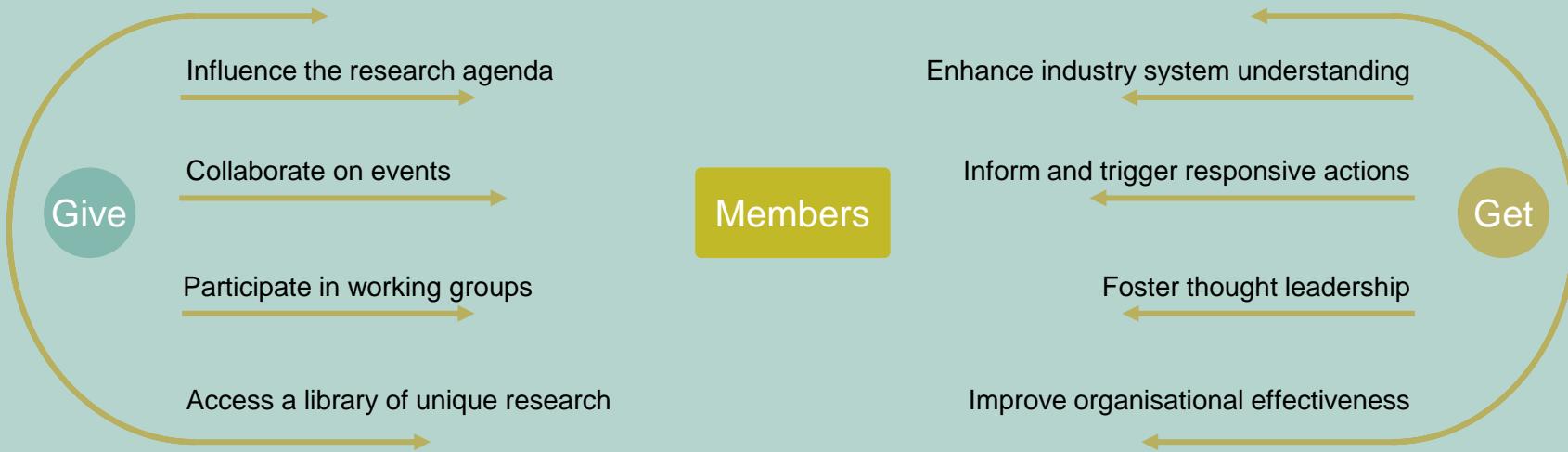
**“You opened my eyes in so many ways. I learnt about another way of thinking about sustainability, about group dynamics and teams, about posing challenging questions, about how to create a special work environment. And I feel very happy to be part of it now.”**

- 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

If you're looking to find out more about us, take a peek at what's readily available before becoming a member...

[Follow us on socials >](#)

[Read our investment insights >](#)

[Digest our research papers >](#)

[Listen to our podcasts >](#)

[Join an event >](#)

# Our members | 36 asset owners | 14 asset managers

2015



Oak Pension Asset Management Ltd  
BARCLAYS

CORONATION  
TRUST IS EARNED™

**futurefund**  
Australia's Sovereign Wealth Fund

**PSRS PEERS**  
PUBLIC SCHOOLS & COLLEGE EMPLOYEE  
RETIREMENT SYSTEMS OF MISSOURI



\* Previously QSuper

2016/2017



**MFS**  
Investment Management

**S&P Dow Jones  
Indices**  
A Division of S&P Global

2017

**Baillie Gifford™**

2017/2018

**HSBC**  
Bank Pension  
Trust (UK)



2018

**Alliance Witan®**  
Find your comfort zone



2018/2019

**LLOYDS  
BANKING  
GROUP**  




2019

**CLAC**  
better together



BT Pension Scheme  


2020

**LifeSight**  
Willis Towers Watson LifePAC

**THE CHURCH  
OF ENGLAND  
PENSIONS BOARD**

**ifm**  
investors

**[A  
B]**  
ALLIANCEBERNSTEIN®

**aware**  
SUPER

2021

**ACPS**  
**KraftHeinz**

2022

**NZSUPERFUND**  
Te Rauhī Taiao Taiao  
Kaumātua o Aotearoa



**Rest**

**CSC**  
Commonwealth  
Superannuation  
Corporation

**Insight  
INVESTMENT**

2022

**Australian  
Retirement  
Trust** \*



**atomos**  
wealth & financial wellbeing

2023

**APOLLO  
People's  
Partnership**



2025



**AustralianSuper**

**SimCorp**

# In the last 12 months...

Launched our **Global Wealth & Global DC Peer Studies**



Work published in over

**900**

industry magazines, journals and newspapers across 75 countries globally

**10** projects with international organisations including: CFA Institute, PRI, CAIA, and ShareAction

13  
INVESTING FOR  
TOMORROW  
podcasts

**US\$17.9 trillion**  
The total assets collectively managed by our members at the end of 2024

**75** countries reached through our work

**1,380** people who joined our 28 events

Launched our **Global Asset Owner Peer Study** with 26 leading funds



**5** new members

Delivered 19 insights and 9 research papers

Launched TPA senior leaders working group

# 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**

## Follow us

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the latest on LinkedIn



Bookmark our  
events page for  
what's coming up

INVESTING  
FOR  
TOMORROW

## Listen: Podcast

Investing for Tomorrow



**Memo (member only)**  
& Grapevine  
newsletters

Research agenda,  
events, latest papers



Find us here

# 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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