



Reconciliation and Responsible Investment Workshop

September 26, 2018 | 1088 Burrard Street, Wall Centre | Vancouver, BC

DRAFT AGENDA*

9:00 – 9:15	<p>OPENING WELCOME AND PRAYER</p> <p><i>Coast Salish welcome by: TBC</i></p>
9:15 – 9:50	<p>DELEGATE INTRODUCTIONS AND EXPECTATIONS FOR THE DAY</p>
9:50 – 10:15	<p>RECONCILIATION AND RESPONSIBLE INVESTMENT OVERVIEW</p> <p>An introduction to the reconciliation and responsible investment work of the National Aboriginal Trust Officers Association (NATOA), including the release of a discussion paper, <i>Responsible Investment and Indigenous Trusts</i>, co-authored with Jason Campbell, Principal and CEO of Arete Development Group LLC.</p> <p><i>Speaker: Mark Sevestre, President, National Aboriginal Trust Officers Association (NATOA)</i></p>
10:15 – 11:00	<p>OVERVIEW OF RESPONSIBLE INVESTMENT APPROACHES</p> <p>This session will provide an introduction to responsible investment including an overview of different responsible investment strategies as well as some key steps for incorporating responsible investment into trust investment policies and practices. We will also provide an overview of different mechanisms by which Indigenous trusts can mobilize capital to be increasingly aligned with traditional values and community needs.</p> <p><i>Speaker: Shannon Rohan, Director of Responsible Investment Leadership, SHARE</i></p>
11:00 – 11:15	<p>HEALTH BREAK</p>
11:15 – 12:00	<p>ALIGNING OUR FINANCIAL ASSETS WITH OUR CULTURAL VALUES</p> <p>Cliff Fregin is Haida, from Old Masset, Haida Gwaii. He will speak about how he has been leading the New Relationship Trust, an independent non profit dedicated to strengthening First Nations in BC through capacity building, through a transition of making the NRT's portfolio of investments more aligned with their identified traditional values.</p> <p><i>Cliff Fregin, CEO, New Relationship Trust</i></p>



12:00 – 12:45	LUNCH
12:45 – 1:45	<p>INSPIRATION IN ACTION: INVESTING IN THE INDIGENOUS ECONOMY</p> <p>Moving from theory to practice, our panelists will provide tangible successes and challenges from their respective work facilitating investment in Indigenous social enterprises, economic development and infrastructure. We will tease out key learnings from our panelists and open it up to experiences, questions and comments from the audience as well.</p> <p><i>Panelists:</i> <i>Raven Capital Partners (TBC)</i> <i>Clint Davis, North 35 Capital Partners</i> <i>Mike Bonshor, Ki'mola Indigenous Capital</i> <i>Facilitator: TBC</i></p>
1:45 – 2:00	BREAK
2:00 – 2:45	<p>RESPONSIBLE INVESTMENT AND FIDUCIARY DUTY</p> <p>This session will provide an overview of fiduciary duty and address some key questions regarding the consideration of environmental, social and governance issues within a fiduciary context.</p> <p><i>Speaker: Jaimie Lickers, Gowlings WLG (TBC)</i></p>
2:45 – 3:00	CLOSING

* Agenda subject to change