



# RRII

Reconciliation &  
Responsible Investment  
Initiative

## INDIGENOUS TRUSTEE RESPONSIBLE INVESTMENT WORKSHOP

# AGENDA

Monday January 28, 2019  
Westin Harbour Castle – Marine Room  
Toronto, Ontario



**SHARE**  
SHAREHOLDER ASSOCIATION  
*for* RESEARCH & EDUCATION

Canadian Council for  
**ABORIGINAL**  
**BUSINESS**



NATOA



Lincluden



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\*Agenda subject to change

12:30 – 1:00	Registration open; coffee and refreshments available.
1:00 – 1:15	OPENING WELCOME, TERRITORY ACKNOWLEDGEMENT  Chief R. Stacey Laforme, Mississaugas of the New Credit First Nation.
1:15 – 1:40	DELEGATE INTRODUCTIONS AND EXPECTATIONS FOR THE AFTERNOON
1:40 – 2:30	RESPONSIBLE INVESTMENT 101  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.  Speaker: Shannon Rohan, Director of Responsible Investment Leadership, Shareholder Association for Research and Education (SHARE).
2:30 – 3:30	RESPONSIBLE INVESTMENT – COMMUNITY CASE STUDIES  We will hear from current and former Indigenous trustees and trust managers on their experiences with responsible investment and integrating community values into the investment activity of their trusts.  Mark Sevestre , General Manager of the Mississaugas of the New Credit First Nation Community Trust and President, NATOA.  Chief Tobi Mitchell, Tsi Snaihne District Chief, Mohawk Council of Akwesasne, and former (founding) trustee of the Mohawks of Akwesasne Community Settlement Trust.
3:30 – 3:45	HEALTH BREAK
3:45 – 4:45	RECONCILIATION THROUGH ECONOMIC DEVELOPMENT AND INVESTING  We will lead a conversation with JP Gladu, President and CEO of the Canadian Council on Aboriginal Business on the role of trusts in community economic development and building of the Indigenous economy.
4:45 – 5:00	CLOSING REMARKS and invitation to reception – Wayne Wilson, Lincluden.
5:00	Please join us for a casual reception generously sponsored by Lincluden Investment Management.