

# MOVING TO SUSTAINABLE FINANCIAL MODELS? - TAKING STOCK

**IMD input and facilitation:** Dr. Aileen Ionescu-Somers, Director, CSM  
Arturo Bris, IMD Professor of Finance

**Venue: IMD, Lausanne  
Auditorium Cassani**

## Monday, 11 April

10:30 – 11:00 Registration

11:00 – 11:30 **Introduction: Setting expectations**

11:30 – 13:00	<b>Financial frameworks: A reality check</b> An overview of the current “state of the art” in the finance environment
11:30 – 12:00	<b>Input presentation</b> Arturo Bris, IMD Professor of Finance
12:00 – 12:15	<b>Group work: Implications of the current context</b>
12:15 – 13:00	<b>Feedback, benchmarking and discussion</b>

13:00 – 14:00 Networking lunch *IMD Restaurant*

14:00 – 15:30	<b>Industry leadership and retrieving trust</b> Responsible leadership: So what’s new in the industry?
14:00 – 14:30	<b>Input from a panel of high level experts</b> Colin Melvin, CEO, Hermes Equity Ownership Services Reto Ringger, CEO & Founder Globalance Bank, Zurich <i>(by virtual link)</i> Rosa Chun, IMD Professor Corporate Reputation, Ethics & Marketing
14:30 – 15:00	<b>Group work</b>
15:00 – 15:30	<b>Benchmarking with the panel of experts/IMD faculty</b>

15:30 – 16:00 Coffee and networking break

16:00 – 17:45	<b>Risk management and responsible investment</b> Embedding responsibility into investment decision-making: Is risk being turned into opportunity?
16:00 – 17:00	<b>Input from a panel of high level experts</b> <b>Colin Melvin</b> , CEO, Hermes Equity Ownership Services <b>Angela de Wolff</b> , Partner ConSer Invest & President Sustainable Finance Geneva <b>Bozena Jankowska</b> , Director Global Head of Sustainability Research, RCM ( <i>a company of Allianz Global Investors</i> ) <b>Antoinette Hunziker-Ebnetter</b> , CEO & Founding Partner, Forma Future Invest <b>Sabine Doebeli</b> , Head Sustainability Management, Bank Vontobel
17:00 – 17:15	<b>Group work</b>
17:15 – 17:45	<b>Benchmarking with the panel of experts/IMD Faculty</b>

17:45 – 18:00 **Wrap up and conclusion**

19:00 **Cocktail and dinner** *IMD Restaurant*

## Tuesday, 12 April

08:30 – 08:45 **Revisiting expectations**

08:45 – 11:15	<b>Allianz and WWF: Pushing the insurance industry to more concerted action around climate change</b> IMD-CSM case winner in the “Finance and Banking” category at the EFMD case competitions in 2010
08:45 – 09:45	<b>Breakout groups address challenging questions about the case and case outcomes</b>
09:45 – 10:15	<b>Coffee and networking</b>
10:15 – 11:15	<b>Group feedback and benchmarking with case protagonists from Allianz and WWF</b> <b>David Bresch</b> , Head Group Sustainability Management, Swiss Re <b>Mark Eckstein</b> , Managing Director, International Finance, WWF-US

11:15 – 12:45	<b>A bird’s eye view from public actors and civil society</b> UNEP-FI and WWF take stock of the current situation
11:15 – 11:45	<b>Input from a panel of high level experts</b> <b>Paul Clements-Hunt</b> , Head of UNEP’s Finance Initiative <b>Mark Eckstein</b> , Managing Director, International Finance, WWF-US
11:45 – 12:15	<b>Group work</b>
12:15 – 12:45	<b>Benchmarking with the panel of experts/IMD Faculty</b>

12:45 – 13:00 **Summary of the Roundtable learning and conclusion**

13:00 – 14:00 **Complimentary networking lunch** *IMD Restaurant*