



ROBERT H. SMITH
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Dechert
LLP

ESG Oversight: The Fundamentals in an Evolving Space for Fund Boards
April 12, 2023 – Washington, DC

9:15 – 9:45	Registration/Continental Breakfast
9:45 – 10:00	Welcome
10:00 – 11:00	Reporting and Data Challenges for Fund Boards Moderator: Julien Bourgeois, Dechert LLP Charles Kim, Voya Investment Management Corey Lewandowski, Broadridge Financial Solutions Luke Wilcox, Ethos ESG, ACA Group
11:00 – 11:45	Investment Strategies and Frameworks – What Should Boards Know? Carey Buxton, Brown Advisory Joan McCabe, Carlyle Tactical Private Credit Fund
11:45 – 1:00	Lunch
12:15 – 1:00	Why All the Confusion about ESG? Dr. Reena Aggarwal, Georgetown University and Dimensional Funds
1:00 – 1:30	Break
1:30 – 2:30	Updates from SEC Exams and Enforcement Moderator: Anthony Kelly, Dechert LLP Andrew Dean, SEC Division of Enforcement Mark Dowdell, SEC Division of Examinations
2:30 – 2:45	Break
2:45 – 3:15	ESG Legislative Landscape Jeannette Lowe, Strategas Securities Sara Vargo, MFDF
3:15 – 3:45	Break
3:45 – 4:45	Overview of ESG for Fund Boards Moderator: Alexandra Poe Kevin Gleason, MainStay Funds and Index IQ ETFs Jon Lukomnik, Van Eck Funds Gwen Williamson, Perkins Coie
5:00 – 7:30	Networking Event at The Henri 1301 Pennsylvania Ave NW, Ste. 140R, Washington, DC **Entrance is on 13 th between E and F Streets NW**