VBA – EFFAS ESG seminar

Thursday 19 September 2013 at 13:30 – 18:30
Venue: Rosarium, Europaboulevard - Amstelpark 1, 1083 HZ Amsterdam

The seminar will focus on two essential topics in ESG-based investment decision-making:

1. Discussion about active versus passive sustainable investing is topical at the moment and shows the progress that ESG (Environmental, Social, Governance) has made in the investment industry.
2. After publishing KPIs for ESG in 2010 EFFAS has been working on enhancing ESG modelling and integrating ESG into valuation which is the core of its ESG Valuation, Measurement & Integration Seminar to be launched in the autumn of 2013.

Programme

13:00-13:30 Reception
13:30-14:15 EFFAS activity on ESG integration, measurement and modelling by Frank Klein, Managing Director, Corporate Clients, Deutsche Asset Management and EFFAS Board Member
14:15-14:45 Market demand active versus passive sustainable investing by David Richert, Investment Consultant Mercer Investments
14:45-15:15 Refreshment break
15:15-15:45 Active management by Masja Zandbergen, Team manager Equities Syntrus Achmea
15:45-16:00 From active to passive management and the impact on sustainability policy by Berrie Verwey, Senior Account Manager F&C Netherlands
16:00-16:15 Sustainable index investing is anything but passive by Paul Broholm, Managing Director Theodoor Gilissen Bankiers
16:15-17:15 Panel discussion moderated by Frank Klein
17:15-18:30 Cocktail

Speakers

Frank Klein Managing Director at Deutsche Asset & Wealth Management, which he re-joined in 2007. Having held a position within Deutsche Asset Management as Global Head of Product Management, he is currently working for the global client group on the German corporate side in institutional distribution. Prior to this, he spent eleven years at Sal. Oppenheim, where he served in a number of positions such as head of equity buyside research department; in the Oppenheim Kapitalanlagengesellschaft mbH; as

German and European equity portfolio manager for domestic and foreign institutional clients, head of mid and small cap equity team as well as in the international distribution department at Oppenheim Pramerica Fonds Trust. Before joining Sal. Oppenheim, Frank Klein worked for Deutsche Bank AG in a broad range of positions primarily in the Asset Management division.

David Richert joined Mercer Investments in Feb. 2009 as principal investments. He advises pensionfunds with all aspects of their investment policy. David is within Mercer Investments Netherlands responsible for Defined Contribution and Responsible investments.
Prior to Mercer David was with Cordares Asset Management, a formal pension fund with 20 pension fund clients with €25 bn. AUM. At Cordares he held the role of Senior Account Manager Institutional Investors (2006-2009). In which he was responsible for the investment policy of the pension fund clients of Cordares. Previous to Cordares he spent 10 years with Delta Lloyd Asset Management as Account Manager Institutional Clients (2000-2006). Prior to this he was Investment Controller (1998-2000) in which he was responsible for the performance & attribution analysis. He started his career as project manager DC solutions (1996-1998).
David holds a master degree in economics (University of Groningen, 1996) and is a Certified European Financial Analyst (RBA). David is the secretary of VBA committee responsible investments.

Masja Zandbergen-Albers, team manager equities at Syntrus Achmea Asset Management. Within the team she is responsible for the sector financials. She has 15 years of experience in the investment industry. Before joining Syntrus Achmea, she was an independent consultant in the investment industry, filling several interim positions and advisory functions. Prior to this, she worked eleven years at Robeco where she fulfilled several (senior) portfolio manager positions in the equity department. Since 2003 she has also been active in responsible investment (corporate governance, engagement and ESG integration) as a second area of expertise. Masja Zandbergen is a member of the VBA committee Sustainable Investment.

Berrie Verwey is Senior Relationship Manager at F&C Netherlands. He is a member of the SRI Client Committee within F&C. Prior to joining F&C in 2011 he worked as Senior Relationship Manager at SNS Asset Management. In the past Berrie was a.o. active at Van Lanschot Bankiers as head of research and as portfolio manager at AZL Beheer. He is member of the VBA commission Sustainable Investment.

Paul Broholm works for Theodoor Gilissen Bankiers as Director Investments. Prior to this, he worked for MeesPierson as Director of Securitization, Head of Business Development/Financial Markets and Head of the Capital Markets Group, Treasury .
Paul holds a Ph.D. from Wharton School, University of Pennsylvania (Benjamin Franklin Scholar. Social Systems Sciences Fellowship.) and a B.A. from Yale University (summa cum laude, Phi Beta Kappa). Among his professional activities are

- Visiting Faculty Rotterdam School of Management, Leiden University School of Management, Amsterdam Institute of FinanceSecretary, Ivy Circle Netherlands. 2010-present.
- Member of various boards and supervisory committees.