

*The 4<sup>th</sup> Annual Global Impact Investing Conference*  
**GLOBAL IMPACT INVESTMENT STRATEGY**

*Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors*  
**Conference – May 15<sup>th</sup> & 16<sup>th</sup>, 2019 – Mövenpick Hotel - Geneva**



***Turning Narrative into Action and Reality***

Geneva, October 16<sup>th</sup>, 2018

Dear Executive,

**Impact investors, asset owners, investment and fund managers** are activist investors who identify and assess **impact investee companies** that in turn need to communicate their **company commitment towards SDGs** through **KPIs** as **impact** is becoming the **3rd dimension after risk and return** to profile a targeted investee .

The conference will help address and assess the gap between supply and demand in both traditional and mainstream impact segments.

Join our high profile participants, speakers and partners in Geneva next May 15<sup>th</sup> & 16<sup>th</sup>, 2019 and participate to the interactive debates.

Kind Regards

**François Golbery**, Chairman  
**ESAFON**

To know more about **ESAFON**, visit our web site:  
<http://www.esafon.com>

**ESAFON** is an independent **non-profit Swiss Association** created 17 years by two partners **Anne & François Golbery** with the sole objective to drive the impact agenda forward and **encourage private and public investors** to use **impact investment** to **enhance financial and social returns, better manage risks** taking into account **externalities** and **engage** stakeholders within the impact ecosystem while preserving the interests of investees.

**ESAFON** has launched a **Swiss Impact Initiative** with the objective to **gather expertise to scale impact globally from Switzerland**.

This implies to transform the **Swiss Impact Investment Ecosystem** including private banking, philanthropic foundations, family offices as well as pension funds and life insurance/re-insurance to drive **economies of scale and collaboration amongst investors, intermediaries and investees**.

**ESAFON** is a Member of the **World Alliance for Efficient Solutions** set-up by the **Solar Impulse Foundation** sourcing **1000 investible solutions** to bridge the gap between economy and ecology and **fast-track clean global economic growth**.

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## PARTNERS



**Toniic ([www.toniic.com](http://www.toniic.com))** is a non-profit organization with a charitable purpose and mission to scale the impact investing industry .

**Toniic** is a global networks for impact investor and Toniic’s vision is a global financial ecosystem creating positive social and environmental impact.

Our mission is to empower impact investors.

Toniic is the global action community for impact investors. We serve individuals, family offices, foundations and funds. We increase the velocity of money and services into impact investing to address global challenges. Our members commit to discover, evaluate, nurture and invest in financial products – in all asset classes – that promote a just and sustainable economy. Through the 100%IMPACT members of Toniic, we share portfolios and learn, together, how to best align financial assets with personal values.

Toniic has members in over 26 countries and its members have invested globally. We are building a movement, and invite you to join us.



**The Swiss Impact Investment Association SIIA ([www.siiach.ch](http://www.siiach.ch))** is a non-profit association in Zug with a mission to showcase investments and companies with societal impact.

SIIA is a platform for best practice impact investments.

SIIA seeks credible risk, return and impact investment opportunities to showcase. SIIA encourages all stakeholders to jointly develop a narrative for impact investment for society to adopt.

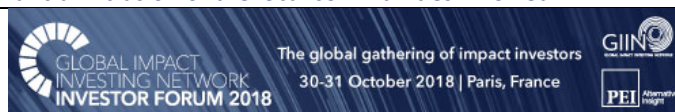
SIIA envisions a society in which the quest for economic profit solves rather than creates social and environmental pressure.



**South Pole ([www.southpole.com](http://www.southpole.com))**

A pioneer in the field of climate impact assessment on investments and a world-leading advisor on sustainability-related portfolio risks, **South Pole** helps asset owners and asset managers gain actionable insights on the climate impact of their assets.

The Group’s diverse emission reduction portfolio includes many projects that ensure financial inclusion of the local communities involved.



The **GIIN Investor Forum 2018** ([click here](#) to download the program) taking place on 30-31 October in Paris will bring together over 1,000 active and aspiring impact investors, the largest of its kind. With a diverse speaker line-up of over 150 senior figures, you can learn from industry pioneers and discover how the biggest investors and asset managers are incorporating impact into their strategies.

Whether you are currently making impact investments or exploring the opportunities, don’t miss this opportunity to hear from the industry’s pioneers and take part in the discussions shaping the future of the market.

If you are an **ESAFON conference participant 2019**, you benefit from a **10% discount on your GIIN Forum registration fee** (please use your discount code **ESAFON-GIF18**)

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## **Outline**

**Conference, May 15<sup>th</sup> & 16<sup>th</sup>, 2019**

Amongst others, the following topics will be developed and detailed:

- **Methodology & Tools for Evaluating and Communicating on SDG Commitment and ESG Performance : The investee and investor’s perspective**
- **Creating a Methodology for Investing in a Portfolio of Socially Responsible Assets**
- **New EU Regulatory Framework for Sustainable Growth and its impact on Institutional Investors and Financial Advisers Behaviour**
- **Round-table : Innovative Ideas to Incentivize Impact Investment**
- **Selected case-studies and discussion over completed impact investments with proven large scale positive correlation amongst impact and return**
- **Impact Investing in Action : A selection of top-notch impact investment projects**
- **Pro’s and Con’s of Different Impact Investment Models and Strategies from both an Investee and Investor’s Perspective – Discussion**
- **State of the Art for Mitigating Risk in an Impact Fund**
- **Results from a 2018 Benchmarking Survey of Swiss and Global Family Offices Involved in Impact Investing**
- **Highlighting the added –value of Blockchain Technology in Managing Global Impact Investment Strategies – a step by step approach alongside the value chain**
- **Innovative Solutions for Sourcing and Scaling Investments in Niche Impact Market Environment – Discussion**

## **Who Should Attend**

- **Institutional Investors including Asset Managers, Insurers, Re-insurers, Pension Funds**
- **Large scale Family Offices, Private Investors, Multi Family Offices, Strategic Advisors**
- **Endowments and Foundations**
- **Asset & Fund Managers, Lawyers, Administrators and Service Providers**
- **Real Estate Fund Managers, Real Asset Managers, Private Equity Fund GP’s and LP’s**
- **VC, Start Ups, Social Entrepreneurs, Next Gen**
- **Global Heads of Fund Development**
- **Private Banks and Wealth Managers willing to set-up and implement impact investment fund vehicles**

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**ESAFON 3<sup>rd</sup> Annual Global Impact Investment Strategy - April 19<sup>th</sup> 2018 – Geneva**  
**FEEDBACK FROM THE DELEGATES**

**Thanks for hosting an amazing event with great speakers and participants, we enjoyed being there and presenting our work in affordable housing in India.**

*Kirti Timmanagoudar, Managing Partner | Brick Eagle Funds*

**It was such a great and insightful event. Thank you very much for organizing and providing the opportunity to exchange with like-minded people!**

*Nadine Bruder, Founder, Yes Brand Please*

**Thank you very much for the excellent conference last week- very well organised, immensely useful**

*Raj Rana, Director, the Wolfgroup*

**Thanks again for the great meeting today!**

*Zsuzsa Hutton, Managing Director, OlaRe*

**Thanks again for the organization!**

*Dr Willem Schramade, Portfolio Manager Impact Investing, NN Investment*

**Congratulations on the successful completion of the conference!**

*Angela Bai, General Secretary, China Alliance of Social Value Investment*

**Thank you for allowing me to moderate such a high caliber panel !**

*Klaus M. Christensen, President, Swiss Impact Investment Association*

**Many thanks for hosting a wonderful conference and very interesting conversation. I had a great time! I look forward to staying in touch and please let me know how I can continue to support your efforts.**

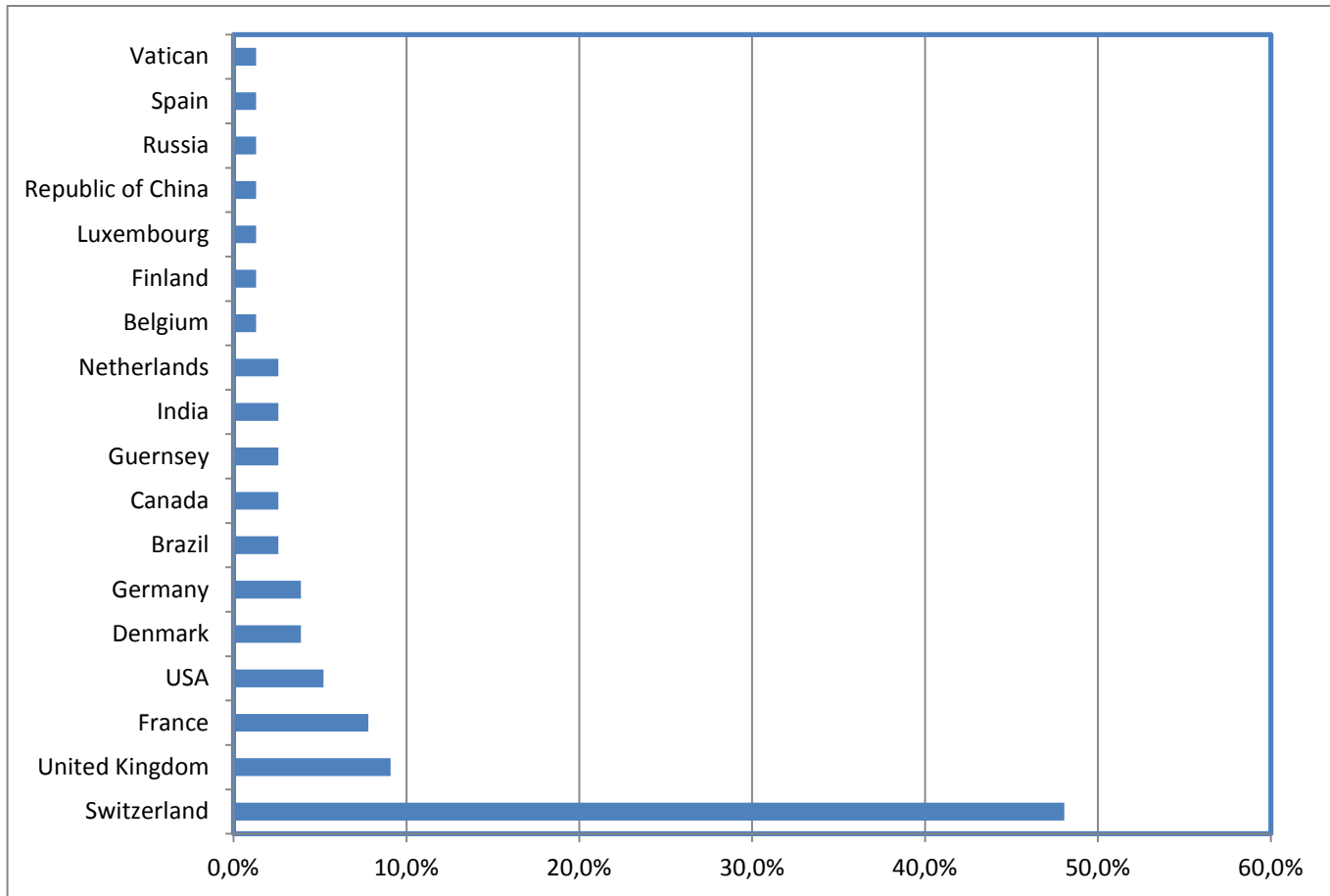
*Karl H Richter, Head of Research and Knowledge, UNDP SDG Impact Finance (UNSIF)*

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**ESAFON 3<sup>rd</sup> Annual Global Impact Investment Strategy - April 19<sup>th</sup> 2018 – Geneva  
 Breakdown of the Delegates by Country**

18 represented countries



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**ESAFON PARTNERSHIP OPPORTUNITIES 2019**

Should you like to **enhance your brand** and **promote your impact expertise, products and services** to **high profile Single Family Offices, Impact Private & Institutional Investors and Impact Fund & Asset Managers**, don't hesitate to benefit from the **ESAFON Partnership Opportunities** now available for the 4<sup>th</sup> Annual Global Impact Investing Conference, May 15<sup>th</sup> & 16<sup>th</sup>, 2019, Geneva.

If interested, please contact **Dr Anne Golbery, Senior Managing Director, ESAFON, [a.golbery@esafon.com](mailto:a.golbery@esafon.com), mobile 00 33 6 45 83 67 67**

**“EXHIBITOR PARTNER”: 1'950 CHF**

- partner logo inserted in the conference brochure
- an exhibition space in the conference foyer for the duration of the conference to set-up your booth
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- your Corporate Profile inserted on our web site with a link to your web site
- 3 complimentary conference invitations for your colleagues or clients (value: 1'650 CHF)
- the complete mailing list of the conference participants

**“FIRST CLASS PARTNER”: 2'950 CHF**

- a 30 minute non-commercial presentation as a speaker
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- your Corporate Profile distributed to the participants
- 4 complimentary conference invitations for your colleagues or clients (value: 2'200 CHF)
- the complete mailing list of the conference participants

**“SILVER PARTNER”: 4'950 CHF**

- partner logo on front page of the conference brochure
- a 30 minute presentation as a guest speaker with a formal introduction from the chairman
- lunch or cocktail hosted by your organisation (luncheon costs included in the total package of 4'950 CHF)
- partner's logo appears on the schedule in participant folders
- your Corporate Profile published on our web site and distributed during the conference
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- 5 complimentary conference invitations for your colleagues or clients (value: 2'750 CHF)
- the complete mailing list of the conference participants

**“GOLD PARTNER”: 6'950 CHF**

- all the conditions applying to EXHIBITOR partnership, plus:
- partner logo on front page of the conference brochure
- lunch or cocktail hosted by your organisation (lunch included in the total package of 6'950 CHF)
- a 30 minute presentation as a guest speaker with a formal introduction from the chairman
- 10 complimentary conference invitations for your colleagues or clients (value: 5'500 CHF)

**“LEAD PARTNER”: 7'950 CHF**

- all the conditions applying to GOLD partnership, plus exclusivity of partnership to company's market sector

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**ESAFON BOARD MEMBERS**



**François Golbery, Chairman, ESAFON, Switzerland** [fgolbery@esafon.com](mailto:fgolbery@esafon.com)

François Golbery is the Chairman of ESAFON, a not – for - profit independent association registered in the Registrar of the Federal Office in Bern with the objective of promoting and facilitating best practices within the Finance industry. At ESAFON, we are committed to help drive the impact agenda forward as we firmly believe that environmental and social unbalances - well described under the UN SDG's - need urgently to be addressed strategically and financially.

François strongly supports the development of a mainstream global impact capital market driven by investor's willingness and preference to achieve alongside financial returns, environmental and social returns as well.

Through ESAFON and its high profile expert network, Family Offices, strong drivers of Impact Investing, will learn how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment.

François is a Senior Managing Partner at MGFF Ltd, a global strategic advisor to Institutional & Private Investors involved in impact and sustainable investments.

Latest assignments include strategic advisory services to international timberland manager in fund set-up and profiling.

François has built –up a personal network of high calibre experts that are instrumental to forge the future during its tenure at MGI.

In 1988, he started-up and grew the French subsidiary of IIR, a US leading conference business organization in Paris as the most profitable entity of the group and was elected Manager of the Year in 1992 & 1993. He received his prize from Edward de Bono, the originator of the lateral thinking concept. Took over the overall responsibility of the Portuguese office and consequently had a team of 150 people under his responsibility.

He holds an MBA in Finance from the University of Hartford (Connecticut), under the patronage of Michel Barnier, former Commissioner of the Internal Market Division of the European Commission and now in charge of negotiating the Brexit for the EU.

François Golbery is a member of the Royal Ocean Racing Club in London.

François is co-owner and an active manager in forestry assets.

**Dr Anne Walhain Golbery, Senior Managing Director, ESAFON, Switzerland**  
[a.golbery@esafon.com](mailto:a.golbery@esafon.com)



Dr Anne Walhain Golbery is Managing Director and Board Member of ESAFON, a non-profit independent association started in 2001.

ESAFON new objectives from 2015 are to help family offices, private and institutional investors increase access, scalability and effectiveness of their Global Impact Investments.

Anne is Managing Partner of MGFF Ltd, a global impact investment advisor helping managers structure impact investments.

François & Anne are Partners in life and in business; Anne has been the co-founder of MGI Management Global Information SA, managing the global operations of MGI for 18 years. Previously, as IT Program Manager, Anne has been designing and implementing Technical Information Systems for the Space Electronic Equipments at EADS, France, for 12 years, from 1982 to 1994.

Anne held a Doctorate in Atomic Physics, University of Caen, France, 1979.

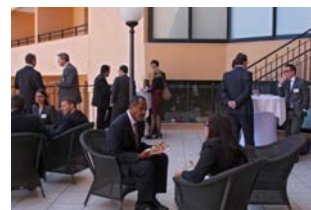
She enjoys doing business and sailing with François for 32 years. She has been racing as navigator on a One Ton sailing boat during the Fastnet Race 1979.

Anne is co-owner and manager in forestry assets.

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## ESAFON 2019



**If you are an Asset Manager, a Fund Manager, the Head of a Family Office or a Strategic Advisor, join**

**ESAFON – The European & Swiss Network of  
 Asset and Fund Managers, Family Offices and Strategic Advisors**

**ESAFON** is a Swiss registered non-profit association located in Switzerland that includes **family offices, institutional investors and best in class experts** addressing **global strategic impact investment issues**.

With 100 honorary members, the primary objective for **ESAFON** in 2019 is to help **family offices and institutional investors** increase **access, scalability and effectiveness** of their **Global Impact Investments**.

Thanks to **ESAFON** and its high profile expert network, Family Offices, strong drivers of Impact Investing, will learn **how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment**.

**ESAFON** members network with major international leaders through think tank meeting and social events.

### **IMPACT INVESTMENT SEMINAR FOR INDEPENDENT WEALTH MANAGERS, EXTERNAL ASSET MANAGERS & FUND MANAGERS**

*Practical Tools to select the best Impact Investment Products for Private & Institutional Investors*  
**Seminar – January 27<sup>th</sup>, 2019 – Central Geneva**

**The 4<sup>th</sup> Annual Global Impact Investing Conference, May 15<sup>th</sup> & 16<sup>th</sup>, 2019, Geneva**

**ESAFON** members will furthermore have access to the **GLOBAL IMPACT FAMILY OFFICE CO-INVESTMENT PLATFORM 2019** through the **ESAFON** website: [www.esafon.com](http://www.esafon.com)

- Their details are added to the **ESAFON DIRECTORY** which is updated on a monthly basis.
- They benefit from **one personal complimentary invitation to the ESAFON conference 2019** and from a **50% discount** on their registration fee to the **ESAFON seminars 2019**
- The Annual **Individual Membership Fee 2019** is **300 CHF**.
- The Annual **Institutional Membership Fee 2019** is **600 CHF**. It allows each Institution, Member of ESAFON, to register until **3 executives** as **ESAFON Members**
- **ESAFON Honorary Membership**: this membership is restricted to the Donors willing to support the Association **ESAFON** for one year: **from 1'000 CHF**. The **ESAFON Honorary Members 2019** became **Strategic Partners of the 4<sup>th</sup> Annual Global Impact Investing conference, May 15<sup>th</sup> & 16<sup>th</sup> 2019**.

*For more information concerning ESAFON Membership and to register, please contact:*  
**Dr Anne Golbery**, Senior Managing Director, **ESAFON**, [a.golbery@esafon.com](mailto:a.golbery@esafon.com), + 33 6 45 83 67 67



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### How to Register:

Please send back this Form fulfilled and signed to our Customer Service at [customer.service@esafon.com](mailto:customer.service@esafon.com)

**CONFERENCE: (cpe: 8 hours)** **16.10.2018**

**Title: GLOBAL IMPACT INVESTMENT STRATEGY**

**Date: May 15<sup>th</sup> & 16<sup>th</sup>, 2019**  
**Conference Code: C1920**

**Conference Venue: Mövenpick Hotel, Geneva**  
[www.movenpick.com](http://www.movenpick.com)  
*This 5\* Business Hotel is very closed to the Airport and has a free shuttle available every 20 min for its clients*

**REGISTRATION:**

Name.....First Name.....  
 Position.....  
 Company.....  
 Address.....  
 E-mail.....Tel.....

<b>GLOBAL IMPACT INVESTMENT STRATEGY</b>	<b>Fee includes Refreshments, Buffet Lunch, a Full Documentation Package including the CD ROM of the speaker presentations</b>
<input type="checkbox"/> Yes, I wish to register * May 15 <sup>th</sup> & 16 <sup>th</sup> , 2019, Mövenpick Hotel, Geneva Code C1920	
<input type="checkbox"/> Yes, I wish to book a room at Mövenpick Hotel At the special ESAFON rate of 250 CHF	
<input type="checkbox"/> Standard Registration Fee	<b>550 CHF</b>
<input type="checkbox"/> Special Early Registration Fee for Registration & Payment by October 31 <sup>st</sup> 2018	<b>350 CHF</b>
<input type="checkbox"/> Special Early Registration Fee for group of 2 persons and more, for Registration & Payment by October 31 <sup>st</sup>	<b>250 CHF per delegate</b>
<b>Date: .....</b>	<b>Signature: .....</b>

\*Please tick the applicable box

- Yes, I will pay by wiring transfer upon the receipt of my invoice
- Please send the invoice to the following address:

Name, Job Title:.....

Address:.....