Ripples of Responsibility: Navigating Uncertainty with Purpose

10 May, 2022, 06:00 to 07:00

Online Seminar
United Kingdom

Investment organisations around the world face an array of ever-changing external expectations. These expectations go well beyond traditional notions of achieving return targets or liability matching and can create important responsibilities that are broader than fiduciary duty or asset stewardship. In *Ripples of Responsibility: How Long-term Investors Navigate Uncertainty with Purpose*, FCLTGlobal provides investors with tools to inventory, anticipate, process, fulfil, and communicate their responsibilities.

This 60-minute panel discussion with **Will Hetherton, Head of Corporate Affairs at the Future Fund** and **Will Kinlaw, Head of Research at State Street Global Markets**, moderated by **Matthew Leatherman, Head of Programs at FCLTGlobal**, will illustrate how an organisation's responsibilities intersect with its core investment activities and will offer examples related to taxation and risk management.

Key Questions

1. How do qualitative inputs, like the responsibilities that govern how an investor earns its return, influence core investment activities, like asset allocation, portfolio construction, performance measurement, and risk management?
2. In what ways does taxation illustrate this relationship between an investor's responsibilities and core investment activities? Isn't any strategy other than maximal tax efficiency a limitation on financial performance and concern in terms of fiduciary duty?
3. To what extent does fulfilling responsibility require an investor to align its activities with partners, like clients, managers, and portfolio companies? What are the implications for core investment activities?
4. How does an investor's time horizon affect the opportunities and challenges associated with fulfilling its responsibilities?

5. What tools does an investor have for balancing the ways in which it fulfils its responsibilities and its performance standards?

More reference material can be found at the bottom of the page

This session was held on **Tuesday 10 May 2022**

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