

Make Ethical Investment Real

Tuesday, 6th – Wednesday, 7th June 2023

Participants' Biographies



Mr Chris Aitken

Chris is a graduate of Edinburgh University and has had a career in agribusiness and the food industry, specialising in supply chain management. He has had director roles in procurement, manufacturing and supply chain across Europe for Nestle and United Biscuits. He ran his own supply chain and change management consultancy business, and has worked with ABF, Northern Foods, RHM and latterly Premier Foods and Burtons Biscuits.

He is Chair of Trustees at Thames Hospice, Trustee and Secretary of The Prince Philip Trust Fund for The Royal Borough of Windsor and Maidenhead, Chair of the Windsor & Eton Choral Society, Vice-Chair of the Windsor and Eton Society, a Lay Steward at St George's Chapel, Windsor, a Director of St George's House, a Trustee of The Foundation of The College of St George, Windsor Castle and Chair of Windsor Festival.

Chris lives in Windsor with his wife Linda and has a home in St Andrews.



Mr Kieron Boyle

Kieron joined the Institute following seven years as Chief Executive of Guy's & St Thomas' Foundation, one of the world's oldest foundations, and itself a pioneer in incorporating impact investment into the investment strategy of its £1 billion endowment. He was an early leader in impact investing, having joined Guy's & St Thomas' from the UK Cabinet Office, where he was Director of Impact Investment and the key architect, starting in 2012, of the UK Government's strategy to make the UK a global hub for impact investing.

That catalytic work included the creation of Big Society Capital, the world's first wholesale social investor, and putting impact investing on the agenda of the G8 during the UK's presidency, in particular, through the creation of the Social Impact Investment Taskforce. Before joining the Cabinet Office, Kieron served in No.10 Downing Street, the Department for Business, the Foreign and Commonwealth Office and the Prime Minister's Strategy Unit. He started his career as a strategy consultant at The Boston Consulting Group in New York.



Ms Amy Clarke

Amy is Co-Founder & Chief Impact Officer of Tribe Impact Capital ("Tribe"), an award-winning wealth management firm and B Corps dedicated in its entirety to advising and managing private and institutional wealth for impact. Amy sits on the board of B Lab UK, the charity overseeing the activities and membership of the B Corps UK community. She is also an Advisor to the Ocean Plastics Leadership Network and Greenheart Consulting. She sits on the Global Steering Group of the Global Ethical Finance Initiative (GEFI) and the Investment Committee of The Blue Cross. Amy has held in house sustainability leadership positions at both Microsoft and Bank of America, as well as having a decade of experience in sustainability consultancy including EY and PwC. Amy has held various non exec and trustee positions historically including Big Issue Invest and The Prince's Initiative for Mature Enterprise (PRIME, now part of BITC). She is an environmental scientist by training (Climate & Soil Science) with a BSc and an MSc from the Universities of Reading and Southampton. Amy proudly mentors a number of younger women in finance.



Mr Richard Collier-Keywood, OBE

Richard is the Chair of the School for Social Entrepreneurs, the Chair of Fair4All Finance (the UK financial inclusion organisation funded by dormant assets), the Chair of Big Education and the Chair of New Forest Care (a company that provides bespoke care and education to children with complex needs). He is on the Board and chairs the finance committee of Women of the World Foundation, a UK charity focused on diversity and equality and St George's House based in Windsor Castle. He is on the Board of CoGo, a social enterprise tech start-up based in New Zealand, Australia and the UK, focussed on empowering consumers in their climate choices. He recently joined the Board of The National Lottery Community Fund and chairs the Audit and Risk Committee.

Previously Richard was a senior adviser to DCMS (2017 to 2021) and Global Vice-Chairman of PwC from November 2011 to February 2017 and served as Managing Partner of PwC UK from 2008 to 2011. Richard is a barrister and a fellow of the Institute of Chartered Accountants in England & Wales.



Professor Paul Ekins

Paul has a Ph.D. in economics from the University of London and is Professor of Resources and Environmental Policy at the UCL Institute for Sustainable Resources at University College London. He was a Co-Director of the UK Energy Research Centre from 2004-2019. He is currently a member of UNEP's International Resource Panel. He was one of two global Co-Chairs of UNEP's *Global Environment Outlook*, published in 2019. His academic work focuses on the conditions and policies for achieving an environmentally sustainable economy. His forthcoming book is *Stopping Climate Change: Policies for Real Zero* (Routledge, 2024). In 1994 he received UNEP's Global 500 Award, and in 2015 he received an OBE for services to environmental policy.



Mr Daniel Godfrey

Daniel is a Visiting Fellow at the Global Systems Institute of Exeter University, which researches system-wide solutions that can help to build a sustainable future for people and planet. Daniel works with the MSc students and acts the institute's bridge between sustainability science and finance. He is also a member of the Independent Governance Committee for the Legal & General DC pension schemes looking after the interests of over 2.5 million members and £35 billion of their savings. Since its founding in 2015, Daniel has been a Consultant, an NED, and now a Senior Adviser at Moneybox, the UK's fastest growing savings and investment platform for younger people with over 1 million customers. He is an adviser to ShareAction and the Accounting for Sustainability (A4S) Asset Owners Network and a Member of the Advisory Board of the IoD's Centre for Corporate Governance. He has previously held CEO roles at City trade associations, including the Investment Association, the trade body for the UK's £10 trillion asset management industry.



Ms Sarah Gordon

Sarah Gordon is a Visiting Professor In Practice at the London School of Economics' Grantham Research Institute on climate change and the environment. Before starting this role in 2023, she was the founding Chief Executive of the Impact Investing Institute, which was launched in 2019, with a mission to make capital markets fairer and work better for people and the planet. Previously, Sarah spent 18 years at the Financial Times, where she ran the paper's corporate coverage during the 2008-12 financial crisis and was Business Editor. Before journalism, she worked in fund management in the UK and the US, and at the UN Conference for Trade and Development in Geneva. Sarah is a non-executive director of Social Finance, a member of the Charity Bank Advisory Panel, a speaker for Speakers for Schools, and a member of the Leadership Council at Snowball Investment Management.



Dr Richard Itaman

Richard is a Senior Research Associate at Jesus College Intellectual Forum, University of Cambridge. He previously led the study on the feasibility of creating a fossil-free bond index for the College. His research and teaching are in the fields of financial development, sustainable finance, structural transformation, macroeconomics and the political economy of development.

He is a Fellow of the Higher Education Academy, and has taught at the University of Cambridge, King's College London, University of Leeds, University of Bath, University College London and the School of Oriental and African Studies, University of London.



Ms Bridget Jackson

Bridget is a seasoned sustainability expert with more than 20 years of experience in the field, first advising clients as a partner in a global management consultancy, and then more than a decade as Chief Sustainability Officer at PwC UK and a member of the Global Sustainability Board, before assuming the role of PwC Global Director of NGO Collaboration.

Since early 2021, she was the Business Engagement Lead in the High Level Climate Champions team working alongside the UK, Egyptian and UAE governments on the COP26, COP27 and COP28 climate summits, engaging business and finance towards a net zero, resilient, nature positive and just global economy as part of the UNFCCC multilateral process. She has been active in many pioneering ESG leadership groups, including the BITC Climate Leaders Action Group, Net Zero Taskforce, and Circular Economy Taskforce. Bridget is a former Commissioner of the London Sustainable Development Commission, and currently serves as the Chair of the We Mean Business Coalition Grants Advisory Committee.

In her spare time, she is an avid cyclist and has a keen interest in both healthy living and innovation.



Ms Ingrid Kukuljan

Ingrid has 25 years' experience which spans asset management as well as capital and private markets. As Head of Impact and Sustainable Investing, she is responsible for the construction and management of the portfolios within the strategy. She joined from PDM Capital where she was a Principal and previously had spent a decade at Jupiter Asset Management as Fund Management Director. She started her career at Lazard & Co as a European equities analyst. Ingrid was included in Citywire's first ever global compilation of the 1,000 top fund managers in the world. Ingrid is a Non-Executive Director of Fair4All Finance, founded with dormant asset money solely to create positive impact by promoting financial inclusion in UK. Ingrid holds a degree in Italian and Business Studies from University College London and is fluent in four languages.



Mr Scott Lawrence

Scott has worked in renewable energy power generation for more than fifteen years, leading many of the investments across Glennmont's fund platform. Prior to founding Glennmont Partners, Scott was the co-founder and director of Windsor Alternative Investments – a company formed to finance and develop solar power plants in Europe. Before focusing on renewable energy, Scott was involved in private equity acquisitions and debt capital finance for commercial real estate transactions in Europe and the United States.



Ms Ida Levine

Ida is a principal with Two Rivers Associates Limited consulting on public policy, strategy and governance. She serves on the Board of Directors of the Impact Investing Institute and is Lead Expert on Policy. She also sits on the Financial Markets Law Committee, and the Advisory Board of the UCLA Institute of Carbon Management.

Previously Ida was a Board Director and Senior Vice-President and Senior Counsel of Capital Group (CG) and served as its Director of Public Affairs in Europe. Before CG, Ida was European Counsel with JP Morgan Investment Management and a Partner at the international law firm Jones Day (London and New York). Ida was a founding Director of the UK Investor Forum.

Ida has a keen interest in the Arts and is Vice-Chair of the Royal Academy of Dance Board of Trustees. She also is a Trustee of Dancer's Career Development (DCD) and the Maria Bjornson Memorial Fund.



Dame Sara Llewellyn DBE

Sara is the Chief Executive of the Barrow Cadbury Trust. Her career has included ten years as Deputy Director of City Bridge Trust. Before that, she had a career in operating charities including as Chief Executive of St Giles Trust in London and before that, ran a network of women's refuge provision in South London.

Sara is the Chair of the Philea's Diversity, Migration and Integration Network of foundations in Europe and has served on a number of boards including Lottery distributors, Futurebuilders England, Charity Bank, the efc and the Association of Charitable Foundations. Her background is in activism, particularly in the domestic violence and equality movements and in local social enterprise and community family provision.

The Barrow Cadbury Trust is the largest philanthropic foundation of the Cadbury family. With strong Quaker roots, we seek structural changes in the areas of economic, racial, gender and criminal justice. We are very active in the responsible finance movement and in developing the social investment market, strengthening civil society and advancing philanthropy.

All the Trust's work is seen through race and gender justice lenses and the commitment to racial justice is many decades old. We have played a strong part in the creation of the Funders for Race Equality Alliance and on racial disproportionality in the criminal justice system. We are currently working on migrant justice, on tackling anti-Muslim sentiment and other forms of hatred, decolonising our endowment and using it as active shareholders.

Sara was made a Dame in the Birthday Honours List 2021 for services to social justice.



Mrs Carol Mack OBE

Carol was appointed Chief Executive of ACF in 2016, having previously served as its Deputy Chief Executive. Prior to ACF, Carol worked advising charities on governance and charity law, as well as national policy formulation at the Charity Commission for England & Wales. She also has experience in grass-roots charities and the commercial sector, having begun her career in the international trading and refining division of an oil company. She was previously a founding trustee of the National Emergencies Trust and Vice Chair of Tree Aid. Currently she is Chair of the Wales Funders Forum and a board member of Philea, the European Philanthropy Association.



Dr Sandy Mather

Sandy is a values-based leader. She has political experience, a thirst for hard work and is passionate about the role of charities and membership organisations to make a positive change in Society. She has a wealth of experience operating at a senior management level, leading strategy and change programmes for non-profit organisations and membership bodies particularly those involved in professional education, training, standards, research and international development. She joined the Intensive Care Society in November 2017 where she is Chief Executive responsible for the strategic leadership of the Intensive Care Society. In 2020 she received a national Memcom Award for Outstanding Leadership in a Time of Crisis.



Mr John Maton

John is the Assistant Director of Legal Services at the Charity Commission for England and Wales. John's role involves leadership and management of the Commission's Legal Services division, as well as leading and advising on key legal issues in the Commission's work, including the development of policy and sector guidance.

Before joining the Commission John worked as a solicitor in private practice, advising charities, non-profit organisations, regulators and other public sector bodies on matters relating to charity law, governance, regulation and legal structures.

Both at the Charity Commission and in the private sector John has developed extensive experience of advising on the legal issues relating to investment by charities.



Ms Siobhan McShane

Siobhan was an Intern at St George's House from 2018-2019. She has returned to act as Rapporteur for a number of consultations since then. She currently works as Unaccompanied Asylum Seeker Officer and Higher Education Officer for Lewisham Virtual School.



Mr Tom Montagu-Pollock

Tom joined Schroders and began his investment career in 2005 after graduating from Newcastle University with a BA (Hons) in Business Management. Tom is Co-Head the Cazenove Charities team and is the named manager of our two flagship Charity Authorised Investment Funds, the Charity Multi-Asset Fund and Responsible Multi-Asset Fund.

Tom is a chartered fellow (FCSI) of the Chartered Institute for Securities and Investment. He has also completed the London Business School Foundation and Endowment Asset Management Course. He is a Trustee and member of the Finance & Investment Sub-Committee of the Natasha Allergy Research Foundation.



Mr Stephen Muers

Stephen is CEO of Big Society Capital, the UK's leading social impact investor. He has been with BSC since 2016 and CEO since 2020. Prior to joining BSC he held a number of senior roles in the UK civil service. He also chairs the Friends Provident Foundation, a small grant-making trust focused on creating a fairer economic system. His book "Culture and Values at the Heart of Policy Making" was published in 2020 by Policy Press.



Mr John Newbegin

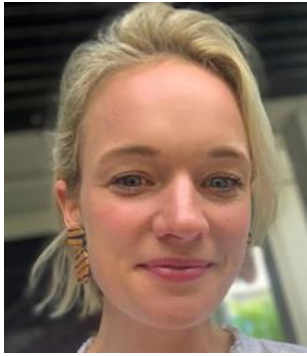
John is a Non-Practising Solicitor. From 1977 to 2004 Partner CMS, solicitors; Head of Commercial Department and member of Partnership Council; Specialisms Financial Services Regulation, Charity Law. From 2004 to 2009 C. Hoare & Co Head of Compliance and from 2009 to 2017 C. Hoare & Co General Counsel.

He is currently Company Secretary St George's House



Miss Serena Oppenheim

Serena is an impact entrepreneur in both climate and health. With a successful exit in the renewable energy space she experienced many barriers, both regulation, network and long-term investment horizons, to deploying the necessary capital for change. Oppenheim established Fin-Erth Women (100+ women in finance, innovation, policy in climate) to help community members enact change, and is the co-founder of the Fin-Erth Summit, (invitation only summit with the challenge to unlock the 14-23% of global capital needed to be re-deployed towards climate). Her leadership roles include Chief Strategy Officer for medtech company WAVi, affordable accessible brain scanning, and is the co-founder of Granite Earth, a climate investment vehicle. She is a Member of Milken Institute's Young-Leader-Circle and holds a BA from Brown University, a MA International Affairs & Diplomacy from SOAS, and MBA from Columbia Business School.



Mrs Emily Petersen

Emily joined Cazenove Capital in 2010 after graduating from Trinity College Dublin with a degree in Economics and Philosophy. Emily has completed the Cambridge Institute for Sustainability Leadership Sustainable Finance course and Chartered Institute of Securities and Investment Diploma and is a Portfolio Director, responsible for managing investment portfolios for Universities and Charities. She is one of the firm's sustainability leads and was a 2022 Women in Investment Awards Finalist. Emily is a trustee of a homelessness charity in East London and has recently helped to raise impact investment for new move on accommodation.



The Reverend Canon Dr Mark Powell

Mark trained for the ordained ministry at Ripon College Cuddesdon, after studying chemistry at the University of Bath and obtaining a doctorate on non-narcotic analgesics. From 1985 to 1988, he was Curate at Evesham in Worcester diocese. From 1988 to 1996, he was Vicar of Exhall in Coventry diocese, before moving to St Albans diocese where he was Vicar of Leavesden from 1996 to 2000. From 2000 to 2011, he was Vicar of St Peter's, Ealing in London diocese, and then from 2011 he was Rector of four rural parishes in Derby diocese. In 2016, Mark was appointed a Canon of St George's Chapel, Windsor.

Mark's interests include liturgy and psychology, environmental and justice issues, music and art; he has a particular interest in alchemy and spirituality. Mark's responsibilities within the College of St George involve the finances, the fabric of the Chapel and other buildings, and the Archives, as Canon Steward, Treasurer and Librarian, as well as participation in daily worship in the Chapel.



Mr Malcolm Preston

Malcolm is passionate about sustainability. Having retired from PwC, following a decade as Global Sustainability Leader, he wants to stay relevant and in touch with the leaders of tomorrow. He is now an Adjunct Professor at Kellogg School of Management, teaching sustainability on their MBA and programme and visiting Faculty at Harvard Business School. He is also the Sustainability Adviser to a number of large international businesses and one small sustainability start-up. He focuses on how to build sustainability thinking into core business strategy, including impact measurement and alignment with the SDGs.

Apart from his obsession with travelling, he loves skiing (but still thinks he is 25, which is rapidly becoming a health hazard), play golf badly, tennis even worse and hate reading.



Mr Akaraseth Puranasamriddhi

Akaraseth is a DPhil Candidate in Climate Risks and Sustainable Finance at the School of Geography and the Environment, University of Oxford. His research aims to understand and quantify the fiscal implications of climate risks. He is also a Researcher at the Oxford Martin School's Programme on Systemic Resilience, focusing on integrating nature and climate into financial decision making.

Together with his research at Oxford, Akaraseth is a Research Affiliate at the University of Cambridge and University College London in Sustainable Finance and Energy Access, respectively. He is also a Trustee at Engineers Without Borders UK, an advisory board member at Fossil Free Research, and a member of the United Nations Development Programme (UNDP), Environment Programme (UNEP), Framework Convention on Climate Change (UNFCCC), and Human Rights (UN OHCHR) Youth Advisory Group on Climate Justice in the Asia-Pacific.



Dr Ellen Quigley

Ellen is a Principal Research Associate, the Co-Director of Finance for Environmental and Social Systemic Change, and the Special Adviser (Responsible Investment) to the Chief Financial Officer, all at the University of Cambridge. Her work centres on the mitigation of climate change and inequality through the investment policies and practices of institutional investors. She is from Saskatoon, Saskatchewan, Canada, and holds an AB in English literature from Harvard College, an MSc in Nature, Society, and Environmental Policy from the University of Oxford, and a PhD in economics education from the University of Cambridge. Her article, Universal Ownership in Practice: A Practical Investment Framework for Asset Owners, won the GRASFI Paper Prize for Potential Impact on Sustainable Finance Practices in 2020.



Mr Alan Smith

Alan is the First Church Estates Commissioner for the Church of England since 1 October 2021.

Alan was formerly Senior Advisor - Climate and ESG Risk Management; and prior to that, Global Head of Risk Strategy and Chief of Staff to the Group Chief Risk Officer - HSBC. He was a member of HSBC's climate business council which shaped the group's sustainable finance strategy. Alan worked with HSBC for 27 years in a variety of senior finance, investment banking, risk, and capital management roles.

Alan was Systemic Resilience Forum Chair at the Coalition for Climate Resilient Investment from June 2021 to March 2023.



Mr Jonathan Ward

Jonathan is a climate and energy practitioner who has held a wide range of professional and voluntary roles in the last two decades. Jonathan's current role at Cogo is to lead impact work on carbon reduction for individuals and small businesses in EMEA, whilst identifying and shaping product needs around climate related regulations, disclosure and risks.

Jonathan has a multidisciplinary background, with a number of research related roles and projects, and has worked at the leading edge of city/sub-regional climate, low-carbon economy and energy policy, whilst securing funding for programmes.



Mr Peter Ward

Pete heads up the team at the Natural History Museum responsible for securing corporate sponsors and partners, in particular facilitating relationships with companies interested in using the Museum's Biodiversity Intactness Index to understand their impact on Biodiversity. He was a Delegate at COP15 in Montreal and represents the Museum on the World Economic Forum's Global Collaboration Village project. Previously, Pete was Head of Sponsorship at Sainsbury's where he was responsible for managing the relationships with the British Paralympic Association and Comic Relief, helping to raise over £37m for the charity over 4 years, as well as working 10 years previously as a buyer.