

# Workshop on Strategic Direction for Global Governance, Environmental Social and Governance (ESG) Integration, and Industry Context

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## Moderator Bio

**Allan Emkin, Managing Director, Pension Consulting Alliance**

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Allan Emkin founded Pension Consulting Alliance, Inc. (PCA) in 1988, with offices in Los Angeles, New York City, and Portland, Oregon.

Long a member of the consulting community, Allan has over 25 years of general consulting experience emphasizing public plan administration and investment policy, as well as international, global, and real estate investments.

Allan was Vice President at Wilshire Associates before forming PCA in 1988. Prior to his work in the consulting field, he worked in the California Governor's Office in the Pension Investment Unit. Before joining the Brown administration, he was a registered lobbyist for ten years specializing in affordable housing and other matters affecting low-income families.

Allan is a frequent speaker at various conferences and educational seminars and has long standing relationships with the Liberty Hill Foundation in Santa Monica, California as well as The Labor and Worklife Program at Harvard University.

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**Panelist Bio**      **Jane Ambachtsheer, Global Head of Responsible Investment, Mercer**

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Jane Ambachtsheer is Partner and Global Head of Responsible Investment at Mercer Investments; based in Toronto, Jane joined Mercer's London, UK office in 2000. She is responsible for developing intellectual capital across a range of responsible investment topics and advises investors in North America, Europe, and Asia Pacific.

Jane was a consultant to the United Nations through the development of the Principles for Responsible Investment, which has now been supported by more than 1000 signatories. She is a global advisor to the Carbon Disclosure Project and sits on the finance committee of the Toronto Atmospheric Fund.

In 2011, Jane received a Lifetime Achievement Award from the Canadian Social Investment Organization. In 2008, Mercer's decision to expand its manager research to include an assessment of manager integration of environmental, social and governance (ESG) factors was awarded "most innovative development" by Investment & Pensions Europe's ESG Leader Awards. In 2007, Mercer was awarded the Capital Markets Award for Sustainable Investment & Banking, as part of GLOBE Awards for Environmental Excellence.

Jane is an Adjunct Professor at the University of Toronto, where she teaches a graduate course on responsible investment and sits on the University's Environmental Finance Committee. She holds a Bachelor of Economics and English literature with honors from York University and a Master of Social Science from the University of Amsterdam. Prior to joining Mercer, Jane worked for CEM Benchmarking, in Amsterdam and Toronto.

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**Panelist Bio**      **Roger Urwin, Global Head of Investment Content, Towers Watson**

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Roger Urwin is the Global Head of Investment Content at Towers Watson. His role includes work for some of the firm's major investment clients both in the United Kingdom and internationally. He leads the firm's work on transformational change and has conducted major strategic reviews at a number of global leading funds. He is also heavily involved with the Towers Watson Thinking Ahead Institute.

Prior to his current position, he was the Global Head of the investment practice from 1995 to 2008. Roger joined Watson Wyatt in 1989 to start the firm's investment consulting practice. Under his leadership, the practice grew to a global team of over 500. His previous careers involved heading the Mercer investment practice and leading the business development and quantitative investment functions at Gartmore Investment Management.

Roger's investment innovations include three global firsts: the origination of the first target date DC funds (in 1988), the risk budget framework (in 1999) and the governance budget framework for assessing asset owner organizational effectiveness (in 2007). He is also the author of a number of papers on asset allocation policy, manager selection and governance, and sustainability. He is a previous Board member of the Chartered Financial Analyst (CFA) Institute and is now on the Board of the CFA Future of Finance Council and an Advisory Director to MSCI Inc. Roger has a bachelor's degree in mathematics and a master's degree in applied statistics from Oxford University. He qualified as a Fellow of the Institute of Actuaries in 1983.

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**Panelist Bio**      **Verity Chegar, Vice President, BlackRock**

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Verity Chegar, Vice President, is an ESG Strategist within the BlackRock Investment Stewardship group. She is responsible for global research of ESG trends and their implications for investment. Her work informs Stewardship's corporate engagement program. She also works with portfolio managers to integrate ESG factors into investment decision-making within BlackRock's active investment strategies.

Prior to joining BlackRock, Verity worked at Allianz Global Investors as an ESG analyst. She was responsible for research and ratings of companies in the global healthcare and global technology sectors. Her role included company and policy level engagement, and she also served as chair of the US proxy voting committee. In 2006 she joined the US Large Cap Portfolio Management team at RCM, which later became Allianz Global Investors. Her investment career began in 2003 at a small cap investment advisor.

Verity serves on the Standards Council Subcommittee of the Sustainability Accounting Standards Board, and is an alternate for the International Integrated Reporting Council. She earned a bachelor's degree in Spanish from Mount Holyoke College in 2000.

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