

ICGN Autumn Conference 2026, Toronto

Wednesday 4 November - Thursday 5 November 2026

University of Toronto

Schwartz Reisman Innovation Campus

ICGN Member Day Tuesday 3 November

To be held at the offices of TD Asset Management

TD Tower, 15th Floor, 66 Wellington Street West Toronto, ON M5K 1A2

13:00 – 14:30 **Asset Owner Forum Launch**

14:30 – 15:00 Refreshments

15:00 – 17:30 **Investor/Auditor Roundtable**

Day One: Wednesday 4 November

08:30 – 09:10 Delegate registration

09:10 – 09:20 Opening Prayer

Larry Frost, Ojibway Leader, Ontario, Canada

09:20 – 09:30 **Land Acknowledgement & Opening remarks**

Jen Sisson, CEO, ICGN, UK

09:30 – 09:45 **Morning Keynote Address**

Ann Lipton, Professor and Laurence W. DeMuth Chair, University of Colorado Law School, USA

09:45 – 10:45 **Plenary 1: Fragmentation and Divergence: The Evolving Global Landscape for Governance and Stewardship**

What is happening, what do we need to know, what do we need to engage with? This session will present recent regulatory and legislative developments across the world and emerging standards which will impact corporate governance and stewardship practices.

- Victor Guo, CFA, Managing Director, Head of M&A and Activism, Corporate Governance and ESG, Sodali & Co, Canada
- Takuya Shiratori, Head of IRSR Consulting Team, Corporate Governance Consulting Department, Sumitomo Mitsui Trust Bank, Japan
- Katarina Hammar, Head of Investment Stewardship, Nordea Asset Management, Sweden

Moderator: Peter van Veen, Global Policy Director, ICGN, UK

10:45 – 11:15 Networking Refreshments

11:15 – 11:30 ICGN Member spotlight: Canadian Coalition for Good Governance (CCGG)

Catherine McCall, CEO, Canadian Coalition for Good Governance (CCGG),
Canada

11:30 – 12:15 Expert Briefing: US Policy and Legal Developments: What They Mean for Shareholder Rights Globally, Hosted by Pomerantz

Recent policy, regulatory and legal developments in the United States are reshaping the shareholder rights landscape, with implications that extend well beyond US borders. As the world's largest capital market, changes in US approaches to shareholder rights, litigation, disclosure and voting can influence global norms, investor behaviour and policy debates elsewhere. This plenary will examine the most significant US developments, assess their international spill-overs, and consider how global investors should respond to protect and promote effective shareholder rights.

- Jeremy A. Lieberman, Managing Partner, Pomerantz LLP, USA
- Daniel Summerfield, Director of ESG & UK Client Services, Pomerantz LLP, UK

12:15 – 12:30 Alternative Performance Measures – Improving Corporate Disclosure

- Tom Trainor, Co-Chair, Industry Standards Reporting Research Council (ISRRC), Canada
- Richard Talbot, Co-Chair, Industry Standards Reporting Research (ISRRC), Council, Canada

12:30 – 13:30 Networking Lunch

13:30 – 14:15 Plenary 2: Allocating Capital in an Era of Change

From geopolitical fragmentation and economic uncertainty to evolving governance frameworks, shareholder rights and regulatory reforms, investors face a growing number of factors shaping capital allocation decisions. As governance standards diverge across markets, investment leaders must increasingly assess not only economic fundamentals, but also the frameworks that support investor confidence and long-term value creation. This session will hear from leading CIOs on how governance quality, stewardship expectations and market reforms influence geographic allocation, asset class decisions and long-term investment strategy in a rapidly changing world.

- Steven Grey, CEO / Chief Investment Officer, Grey Value Management, LLC, USA

14:25 – 15:10 Breakout Sessions

A: Expert Briefing – The State of Sustainability Reporting and Assurance Globally

Sustainability reporting is rapidly becoming a core component of corporate accountability, while assurance is increasingly central to the credibility and usefulness of reported information. This expert briefing will provide a clear global snapshot of where sustainability reporting and assurance frameworks are landing, how requirements and practices are evolving across major jurisdictions, and what this means for investors assessing risk, performance and governance.

- David Madon, Senior Advisor to the Chief Executive Officer, International Federation of Accountants (IFAC), USA
- Elizabeth Seeger, Board Member, IFRS Foundation, USA

Moderator: Snorre Gjerde, Lead Investment Stewardship Manager, Norges Bank Investment Management

B: Emerging Markets in Focus: India, hosted by Quantum Advisors

India is a priority focus market for global investors, combining rapid economic growth with an evolving corporate governance framework. With ICGN set to host a regional conference in India in 2027, this session will provide a forward-looking assessment of what investors need to understand about the Indian governance landscape today—and how active stewardship can help unlock long-term value. The discussion will explore regulatory developments, market practices and engagement pathways, highlighting where investor involvement can make a tangible difference.

- Jennifer Coulson, Senior Managing Director & Global Head of ESG, British Columbia Investment Management Corporation (BCI), Canada

15:10 – 15:35 Networking refreshments

15:35 – 16:20 Plenary 3: Future-Fit Boards: Skills, Culture and Governance

As companies navigate rapid technological change, shifting risk profiles and rising expectations of accountability, board effectiveness is being redefined. This session will explore what it means to build a “future-fit” board, one with the right skills, culture and governance structures to oversee strategy, risk and long-term value creation. From board composition and succession planning to culture, information flows and oversight of emerging risks, the discussion will focus on what good board practice should look like as we look toward 2030 and beyond.

- John Vizikas, Head of Canada Research, ISS STOXX, Canada
- Miekela Singh, Director of Investment Stewardship, GMO, Canada

Moderator: Sarah Neville, Director of Policy Development, Canadian Coalition for Good Governance (CCGG), Canada

16:20 – 17:05 Plenary 4: Collaborative Investor Initiatives: What’s working, what needs to evolve, and how to maximise Impact

Collaborative investor initiatives play an increasingly important role in both company-specific engagement and policy advocacy, enabling investors to amplify their voice on governance, stewardship and market-wide reform. This session will assess how collaboration is being used today across corporate engagement and regulatory or policy dialogue, where it is delivering tangible outcomes, and where current models are under strain. The discussion will explore how collaborative initiatives can evolve to be more targeted, accountable and effective - while remaining aligned with fiduciary duties and long-term value creation.

- Mike Garland, Assistant Comptroller, Corporate Governance and Responsible Investment, Office of New York City Comptroller, USA
- Alex Wolsky, Senior Investment Officer, Minnesota State Board of Investment (SBI), USA
- Barbara Zvan, President and CEO, University Pension Plan Ontario, Canada

Moderator: Lindsey Walton, Director of Global Markets, Principles for Responsible Investment (PRI), Canada

17:05 – 17:20 Closing Keynote Address

Grant Vingo, CEO, Ontario Securities Commission (OSC), Canada

17:20 – 17:30 Closing Remarks

17:30 Evening Reception

Day Two: Thursday 5 November

08:30 – 09:00 Delegate registration

09:00 – 09:10 Opening Prayer
Larry Frost, Ojibway Leader, Ontario, Canada

09:10 – 09:15 **Land Acknowledgement & Welcome Back**

09:15 – 09:45 **Morning Keynote Address**
Demetrios Logothetis, Chairman, PCAOB, USA

09:45 – 10:45 **Plenary 5: Governance for Growth: A Strategic Value Driver Across Public and Private Markets**

Institutional investors increasingly allocate capital across both public and private markets, bringing a consistent, long-term perspective on value creation wherever companies sit on the capital lifecycle. This session will explore how governance should function as a strategic enabler of growth and resilience across public and private companies, supporting better decision-making, capital allocation and accountability - rather than being viewed as a compliance burden or a disincentive to listing. The discussion will focus on how strong, proportionate governance can help companies scale, attract long-term capital and deliver sustainable value in both market contexts.

- Jennifer Coulson, Senior Managing Director & Global Head of ESG, British Columbia Investment Management Corporation (BCI), Canada
- David Herbinet, Member of the Group Executive Committee, Audit & Assurance Leader, Forvis Mazars, UK
- Colin Lynch, Managing Director, Head of Private Markets, TD Asset Management Inc, Canada

Moderator: Caroline Escott, Head of Investment Stewardship, Co-Head of Sustainable Ownership, Railpen, UK

10:45 – 11:15 Networking Refreshments

11:15 – 12:00 **Fireside Chat: Governance, Stewardship, and the Changing Investment Technology Landscape**

Jen Sisson and Glass Lewis CEO, Bob Mann, will explore the broader forces influencing today's global stewardship landscape. The conversation will look at how and why stewardship practices are diverging across markets, how AI and shifting market dynamics are modernizing proxy voting, and how investment and stewardship professionals are leveraging trusted investor-grade data to improve governance within portfolio companies.

12:15 – 13:00 Breakout Sessions

C: Expert briefing: What Should the Role of Indexes be in Modern Corporate Governance? Hosted by Morningstar

This year's mega IPOs have thrust a spotlight on the role of index methodology in determining whether institutional investors end up with unwanted exposure to companies with unconventional corporate governance. This discussion will explore the important nuances of index methodology, investors' views on the effects of index inclusion, and the solutions available to those wishing to include governance and sustainability criteria in their index-based strategies.

D: Expert Briefing: Oversight and Opportunity: Governing AI for Sustainable Value Hosted by KPMG

Artificial intelligence is rapidly becoming a core driver of competitiveness, efficiency and innovation, but it also introduces new risks around accountability, data integrity, bias, resilience and trust. This session will explore how boards and investors can govern AI effectively to balance risk oversight with strategic opportunity. The discussion will focus on how effective AI governance supports resilience, trust and sustainable value creation, and how investor stewardship approaches can encourage responsible adoption and accountability.

13:00 – 14:00 Networking Lunch

14:00 – 14:20 Afternoon Keynote Address

Carol Hansell, Hansell LLP, Hansell McLaughlin Advisory, Canada

14:20 – 15:05 Plenary 6: AI and the Future of Investor Voting: Evolution or Disruption?

Artificial intelligence is beginning to reshape how investors analyse resolutions, apply voting policies and execute stewardship at scale. While AI-enabled tools promise efficiency, consistency and broader coverage, they also raise fundamental questions about judgement, accountability and fiduciary duty. This session will examine how investors can harness technology while ensuring voting remains an informed exercise of ownership rights that supports long-term value creation.

- Pete Dervan, Senior Director, Manulife Investment Management, USA
- Delaney Greig, Senior Director, Stewardship and Government Relations, University Pension Plan, Canada
- Lucas Swertloff, Global Head of Custom Policy, Broadridge, USA

15:05 – 15:50 Plenary 7: Deep Dive: Evolving Stewardship Data, Reporting and Impact

As stewardship expectations increase, investors are under growing pressure to demonstrate not only activity but effectiveness. This session will explore how stewardship data and reporting are evolving, including new metrics, data sources and analytical tools that aim to better capture outcomes and real-world impact. The discussion will focus on how investors can move from compliance-driven disclosure to decision-useful reporting that supports accountability, learning and long-term value creation.

- Rachit Gupta, Head of Global Research, Diligent Market Intelligence Research, UK
- Jane Ambachtsheer, Chief Sustainability Officer, BNP Paribas Asset Management, Canada

15:50 – 16:00 Closing Remarks & Close of Conference

Michael Herskovich, Global Head of Stewardship, BNP Paribas Asset Management, France