

Sustainable Investment in Pension

Over 2021, Headlines relating to Environmental, Social and Governance (E,S and G) topics comes a close second to headlines relating to the pandemic. So now into 2022, are asset owners any wiser on their approach to ESG integration, sustainability investing, their role in the climate transition journey and so on? What additional resources are asset managers putting in place to meet the new demands and support individual investors better? Hear from the panelists and raise your questions and ideas, since the march towards greater disclosure, awareness-building and reporting is unstoppable, and it is important to be on the right side of 'being ready'.

At this webinar, Mercer explores the challenges and invites you to express your thoughts, areas of interest or concerns, and challenges as key decision-makers in your respective areas.

Event Details

In Support of:



Moderator & Presenters:

Ms. Adeline TAN, Ms. Helen LEUNG & Ms. Jaimee TO of Mercer HK

Guest Speaker:

Mr. Phillip BRETNALL of HSBC Provident Fund Trustee (Hong Kong) Limited

Date & Time:

Monday, 11 April 2022 | 3:00pm – 4:00pm

Language:

English

Join the webcast:

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Webcast details will be emailed to participants approximately 24 hours prior to the event via email

Notes:

1. This webinar is eligible for 1.0 hour of non-core CPD/CPT training hours, subject to approval by relevant accreditation bodies. Attendees must log in the Zoom link with the same name and email address registered with the HKRSA.
2. Virtual platform will be provided by Mercer. By registering for this event, you are providing your consent to the HKRSA to pass your personal particulars (including name, title, organisation, and email address) to Mercer to create access of Zoom facility for you.
3. For any enquiries, please contact us at events@hkrsa.org.hk or (852) 2147-0090.

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Event Programme

- 15:00 – 15:05 **Opening Remarks**
Ms. Adeline TAN
Wealth Business Leader, Mercer HK
- 15:05 – 15:20 **Part I – Trustee perspective: Taking appropriate action on one of many priorities**
Ms. Adeline TAN
Guest Speaker:
Mr. Phillip BRETNALL
Chief Executive Officer, HSBC Provident Fund Trustee (Hong Kong) Limited
- 15:20 – 15:45 **Part II – Due diligence on ESG and Stewardship**
Facilitator:
Ms. Adeline TAN
Presenters:
Ms. Helen LEUNG
Fundwatch Solutions Leader, Asia, Mercer HK

Ms. Jaimee TO
Sustainable Investment Consultant, Mercer HK
- 15:45 – 15:55 **Q&A**
Facilitator:
Ms. Adeline TAN
- 16:10 – 16:15 **Closing Remarks**
Mr. Alfred LEE
Vice Chairman of Business Strategy Sub-Committee, HKRSA
Director, Head of Institutional Business, Hong Kong & Macau, Amundi HK

Opening Remarks & Facilitator



Ms. Adeline TAN
Wealth Business Leader, Mercer HK

Adeline has 20 years of consulting experience advising clients on pension governance, investment strategy and performance monitoring. Adeline's move to Hong Kong in 2014 follows 12 years of consulting experience with Watson Wyatt (now Willis Towers Watson) in the UK. Her most recent role was primarily focused on delivering whole-fund investment solutions to clients that have chosen to delegate a greater part of their investment processes. In 2008, she returned to the UK after a secondment to the Shanghai office in 2007.

She serves a broad client base including corporations, wealth managers and public funds. Adeline is a graduate of the Business School at the University of Warwick and is a Fellow of the UK Institute of Actuaries.

Part I – Guest Speaker



Mr. Phillip BRETNALL

Chief Executive Officer, HSBC Provident Fund Trustee (Hong Kong) Limited

Phillip is a seasoned pensions professional with 39 years of experience across a wide variety of roles including senior roles at outsourced pensions providers, to COO of the largest occupational DC scheme in the UK and the UK Pensions Regulator. The last 7 years of his career have been with HSBC in Hong Kong as CEO of HSBC Provident Fund Trustee (Hong Kong) Limited, the largest MPF trustee in Hong Kong and also Head of Pensions Oversight for ORSO schemes under the trusteeship of HSBC.

Part II - Presenter



Ms. Helen LEUNG

Fundwatch Solutions Leader, Asia, Mercer HK

Helen Leung is responsible for leading the strategic expansion and driving growth for Mercer FundWatch, an investment ratings platform for individual investors and financial advisors.

Before joining Mercer, Helen was the MD Head of Greater China Institutional Business, a SFC RO & MIC and a member of the board of directors at the Ninety One Hong Kong Limited (previously Investec Asset Management Hong Kong) for 11 years. Before Ninety One, she was the SVP & Head of North Asia Business Development at Neuberger Berman Hong Kong (previously Lehman Brothers Asset Management Asia) for over three years. Her responsibilities included institutional business growth across traditional and alternative asset classes, firm profile building and senior management oversight.

Before asset management, Helen held various senior positions at corporate, institutional and transactional banking at Citigroup, Deutsche Bank and Standard Chartered Bank.

Helen has served as the Advisory Board Chairperson of a Hong Kong University Financial Services Degree program, a School Manager of an Anglican primary school, a member of Investment Committee of an Anglican Secondary school endowment, a council member of an Anglican church and a Treasurer at the Hong Kong Y.Elites Finance Study Group. Helen is a member of HKRSA and a fellow member of HKSI, has served on HKSI Examinations Committee, the Education & Development Committee, the Corporate Membership Committee and Mentorship Program.

She holds a BA (Hons) in Business Studies and a Master of Science in Financial Management.

Part II - Presenter



Ms. Jaimee TO

Sustainable Investment Consultant, Mercer HK

Jaimee is a Consultant in Mercer's Sustainable Investment team, advising institutional investors in Asia on integrating environmental, social, and governance (ESG) factors into their investment strategy and decision-making process, in line with Mercer's Sustainable Investment Pathway framework.

Jaimee has a particular focus on supporting investors and companies to identify and manage climate change risks, opportunities and reporting requirements.

Prior to joining Mercer in 2021, Jaimee spent 7 years in the sustainability consultancy field. She was once a Senior Consultant in the Climate Change and Sustainability Services team at a global accounting firm, advising corporates on ESG integration, strategy, and green financing.

Jaimee is also a member of the Paris Aligned Investment Working Group under The Asia Investor Group on Climate Change.

Jaimee is native in Cantonese, fluent in Mandarin and English.

Closing Remarks



Mr. Alfred LEE

Vice Chairman of Business Strategy Sub-Committee, HKRSA
Director, Head of Institutional Business, Hong Kong & Macau, Amundi HK

Alfred Lee, Director and Head of Institutional Business for Amundi in Hong Kong and Macau, is responsible for the Institutional Business development in Hong Kong and Macau across all the investment strategies including Active and Passive Fixed Income & Equity as well as ETF and alternative investments. Alfred not only covers the Sovereign Wealth Funds, Central Banks, Insurance Companies but also both government related & corporate pensions, family offices and foundations & endowments.

Before joining Amundi, Alfred was the Head of Institutional Business Development for PineBridge in Hong Kong, Macau and Philippines responsible for all the institutional business activities in those regions. Alfred started his career in BlackRock as an analyst in the institutional client service team to cover the Asia ex-Japan region. Alfred moved on the Institutional Business development team after spending two years at the client servicing to be responsible for the business development in Hong Kong, Macau and Philippines.

Alfred graduated in the University of Hong Kong, with honors in Economics and Finance. Alfred is also a chartered Financial Risk Manager.