

Evolving Fiduciary Obligations of Institutional Investors

FEBRUARY 21, 2017 | TEMPE MISSION PALMS | TEMPE, AZ



Keynote Speaker

Al Gore

*Former Vice President
of the United States,
Chairman,
The Climate Reality Project*

Globalization—And the Role of Active Engagement in It—At a Crossroads

For 8 years now, in conjunction with co-host Kessler Topaz Meltzer & Check LLP, and with the essential input of an Advisory Board of your peers, we will offer a thorough overview of the landscape within which legal advisors are operating to fulfill their obligations as fiduciaries and active shareholders, and in turn, how they may better leverage strategies and objectives within this environment. Emphasizing real-world examples of how shareholders are engaging with the companies they invest in, this one-day event will review the most crucial legal decisions, regulatory actions, and developments investors should be aware of, and offer insights on the approaches successful plans have implemented to create the structures that meet investment return targets strategically and for the long term.

Topics for Discussion:

- ❖ Putting Principles into Action: The General Counsels' Panel
- ❖ The Volkswagen Litigation: A Truly Global Shareholder Action
- ❖ Post-Morrison: What Is the Best Means for Smaller or Less Experienced Plans to Take Action Outside the US?
- ❖ Redefining "Fiduciary" for Everyone? The Consequences of the DOL's Fiduciary Rule for Plan Sponsors and Their Managers and Advisors
- ❖ Identifying and Rectifying Conflicts of Interest in Agreements with Managers and Consultants
- ❖ Creating an Investment Organization to Succeed: Governance, Structure, and Politics: The Canadian Example

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