

MEMO# 34157

May 26, 2022

Agenda for ICI Research Committee Zoom June 2022 Meeting

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TO: Research Committee RE: Agenda for ICI Research Committee Zoom June 2022 Meeting

The ICI Research Committee video meeting on Zoom will take place, mid-day, over two days, June 8, 2022 (12:30 PM to 2:30 PM ET) and June 9, 2022 (12:30 PM to 2:30 PM ET). The first day will focus on ESG; the second day on investors' motivations and activities, as well as a comprehensive update from ICI Chief Government Affairs Officer, John Emling.

ICI Research Committee
Video Meeting
AGENDA

DAY 1 — Wednesday, June 8, 2022
12:30 PM to 2:30 PM (ET)

12:30 PM — Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

12:40 PM to 2:00 PM — Insights into ESG Investing

- Paul Schaeffer, IndexIQ, Moderator
- Gary Mottola, Research Director—Investor Education at FINRA
(<https://www.finrafoundation.org/sites/finrafoundation/files/Consumer-Insights-Money-and-Investing.pdf>)
- Amanda Tepper, Founder & CEO, Chestnut Advisory
- Sarah Gelfand, Managing Director, BlueMark, a Tideline company

2:00 PM to 2:30 PM — ESG Regulatory Update

- Annette Capretta, Associate General Counsel, ICI
- Elizabeth Lance, Assistant Chief Counsel, ICI Global

2:30 PM — Adjourn Day 1

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DAY 2 — Thursday, June 9, 2022
12:30 PM to 2:30 PM (ET)

12:30 PM — Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

12:40 PM to 1:45 PM — Insights into Investors' Activities, the Economy, and Fund Flows

- Paul Schaeffer, IndexIQ, Moderator
- Sean Collins, Chief Economist, ICI
- Shelly Antoniewicz, Senior Director, Industry & Financial Analysis, ICI
- Sarah Holden, Senior Director, Retirement & Investor Research, ICI

1:45 PM to 2:25 PM — Washington Update on Retirement and Fund Policy

- John Emling, Chief Government Affairs Officer, ICI

2:30 PM — Adjourn Day 2

REGISTRATION

Please register at: <https://cvent.me/IPwzAv>.

Please feel free to share this invitation with other colleagues. While we hope you can join us, we welcome non-committee members, as well.

Paul Schaeffer
Chairman, Research Committee
IndexIQ

Sarah Holden
Senior Director, Retirement & Investor Research