



**APPLICATION**

**GLOBAL INVEST SOCIAL EXCELLENCE – ASSET OWNER**

Email your application no later than 12 July to Elza Marette (emarette@agefi.fr)

Name of your company .....

**Particulars of the person in charge of the application**

Last name .....

First name .....

Position .....

Telephone number .....

E-mail .....

**TO APPLY FOR THE GLOBAL INVEST SOCIAL EXCELLENCE – ASSET OWNER AWARD:**

Candidates will have to describe one or more CSR (Corporate Social Responsibility) initiative(s) within their institution (promoting and empowering persons and processes within you organisation) and/or as part of their investments (allocating [new or additional] money & resources to particular asset classes or projects) which is/are aiming at better social inclusion, through efforts in favour of gender equality & empowering women, representation of ethnic minorities and/or combatting poverty and territorial/geographic inequality.

Could you please specify the means employed, the objectives sought and the results achieved?

In addition to this presentation, the jury would like to have some figures/indicators.

- How do you take social criteria into account in your CSR?
- How many – and what percentage of – women are on your board / governing body?
- How many nationalities are represented on your board / governing body?
- Do you observe/measure the effect of training on the upskilling of employees, thereby leading to an upskilling of jobs and then professional advancement?
- How many board members undergo training? What is the standard career path of a member of your board / governing body?
- Could you indicate the budget allocated to each social cause (gender equality, inclusion & integration, ending poverty) in your CSR?
- Do you have a policy in place to promote diversity (gender / social / education) in your recruitment process and career management, including a talent management program?
- Is ESG performance – and in particular the social aspect of ESG – part of the criteria affecting the variable remuneration of managers?
- How do you comprehend social issues at both the asset allocation and investment processes levels?
- Does your ethical charter describe your investment policy? How do you take ESG criteria into account, and, more specifically, how you take social issues into account?
- What part(s) of your assets under management focus(es) specifically/solely on social issues (dedicated funds/mandates)? Do you have plans to extend such an approach to a broader asset pools in the next two years?
- How do you enforce your investment policy in social issues?
- How do you review your investment managers’ performance in ESG issues and, more specifically, social issues? do you include ESG factors in your investment management contracts?
- Do you publish a detailed report on your activity as a shareholder? If not, do you intend to do so?



## **RULES**

### **GLOBAL INVEST SOCIAL EXCELLENCE AWARDS**

#### 1/ Initiatives covered:

One or more initiatives conducted in a hands-on fashion in the award category under consideration.

#### 2/ How to take part:

All asset owners (insurers, pension funds, sovereign-wealth funds, family offices, foundations or endowments), asset managers and corporates may compete in their category.

To do so, simply describe, for each award under consideration, one or more initiatives conducted in a particular area, by filling out the application.

PDF-format applications are to be emailed no later than Friday 12 July 2019 at 6:00 pm to Elza Murette (emurette@agefi.fr).

#### 3/ Jury membership:

Suzanne Bishopric, Co-founder & Managing Partner, GLOBAL SOVEREIGN ADVISORS (GSA)

Philippe Desfosses, Vice-President, INSTITUTIONAL INVESTORS GROUP ON CLIMATE CHANGE (IIMGCC)

Nicolas Firzli, Managing Director, WORLD PENSION COUNCIL

Annick Masounave, Beat Writer, *L'Agefi Hebdo*, L'AGEFI

Zara Nanu, CEO, GAPSQUARE

Guillaume Prache, Managing Director, BETTER FINANCE

Fiona Reynolds, Managing Director, PRI (PRINCIPLES FOR RESPONSIBLE INVESTMENT)

Ric van WEELDEN, Senior Partner, INDEFI

#### 4/ Prize categories:

- Global Invest Social Excellence – Asset owner
- Global Invest Social Excellence – Asset manager
- Global Invest Social Excellence – Corporate

#### 5/ Timetable:

- Applications accepted from Tuesday, 14 May 2019
- Application submission deadline: Friday, 12 July 2019
- Awarding of prizes: Thursday, 10 October 2019

Email the PDF-format application no later than 12 July to Elza Murette (emurette@agefi.fr), along with the following information:

- Your company's name.
- The particulars of the person in charge of the application (first name, last name, position, telephone number, email address).
- The award(s) that you are applying for.

For any further information, contact Ludivine Garnaud at 33 (0)1 41 27 47 83 or at lgarnaud@agefi.fr