

SFi Asian Family Impact Summit

SFi 亞洲家族創效峰會

Where **Capital** meets **Purpose**

TABLE OF CONTENT

THE SUMMIT

AGENDA

PANELS

WORKSHOPS

SFI MEMBERSHIP

PARTNERS



**Sustainable
Finance**
initiative

Table of content

3	Welcome note by Katy
4	The Impact Summit
5	Agenda
6	Our Summit Moderators
	Day 1
7	The Purpose of Capital
9	Icebreaker: 2 Degrees of Separation
10	Impact Pioneer Showcase
12	Pathways to Impact
14	Lightning Pitches
16	Open Mic: Call for Collabs
17	Next Gen Visions
19	Roundtables
22	Tale of Collaboration
23	Thematic Clusters
28	Summit Partners
	Day 2
37	Impact Social
38	Impact Workshops
43	SFi Membership
45	Special thanks

Welcome note

WELCOME!

SFi officially launched in 2018 and due to May 2023, we are proud and honoured to welcome you to the first SFi Asian Family Impact Summit. SFi is a community of dedicated impact investors, we “walked the talk” and invested into businesses and funds making positive change to our environment and our society internationally and at our own backyard, Hong Kong. It is time to go from Incubation to Scale-together

Private wealth investors in Asia are sitting at a unique juncture with access to levers of capital across business, philanthropy and investments, a powerful “tri-factor”. It is predicted that Asia-pacific region’s “private capital AUM, excluding China RMB funds, will grow at an annual rate of 15% reaching \$2.2 trillion by 2026.

At SFi, we believe in the potential of sea-change when capital meets purpose. The narrative around impact investing has just begun in Asia and we are here to amplify and celebrate key influencers in the region.

As we celebrate the 18th Anniversary of the coining of the term “Impact Investing” and the re-opening of Hong Kong post-pandemic, it is opportune time to Rebuild and Revitalize the impact investing ecosystem for the decades to come. Join us.

Access Asia’s most curated gathering of investors in impact, sustainability and philanthropy space – touching over 100 dedicated attendees from family offices, private investors, foundations, entrepreneurs and experts.



Katy Yung

Katy Yung, Managing Partner
Sustainable Finance Initiative

The Impact Summit

Welcome to the inaugural SFi Asian Family Impact Summit. Our goal is to convene Asia's leading family offices and modern wealth owners in the impact space, to explore ways to accelerate the impact investing movement.

The Summit brings together **impact leaders and family wealth owners** to share, learn and collaborate on impact in Asia. We will deep dive into the **Asian Family impact story**, exploring **where capital meets purpose** through personal narratives, pioneer showcases, lightning pitches and collaborative workshops.

At its core, impact investing is driven by the belief that capital resources should be used and allocated purposefully for social and environmental progress, so much so that investment decisions should hinge on a double-bottom line of measurable impact and financial returns.

At SFi, we believe that the "Impact" narrative will play a key role for Asian-based family offices. Asian based family offices and wealth owners are sitting at a unique juncture with access to levers of capital across business, philanthropy and investments, **a powerful "tri-factor"**. Coupled with succession and transfer of wealth to the next generation, we believe in the potential of sea-change when **Capital Meets Purpose**.



Agenda

Day 1

24 May 2023

The Asia Society, Hong Kong | 9 Justice Drive, Admiralty, Hong Kong

09:00–09:30	Coffees & Reception
09:30–09:50	Opening: The Purpose of Capital
09:50–10:00	Icebreaker: 2 Degrees of Separation
10:00–10:35	Impact Pioneer Showcase
10:35–10:50	Break
10:50–11:35	Pathways to Impact
11:35–12:05	Lightning Pitches
12:05–13:15	Lunch
13:15–13:35	Open Mic: Call for Collabs
13:35–14:20	Next Gen Visions
14:20–15:30	Roundtables
15:30–15:45	Break
15:45–15:55	Tale of Collaboration
15:55–17:00	Thematic Clusters
17:00–17:30	Closing: Your Commitments, Our Community
17:30–19:30	Networking Drinks

Day 2

25 May 2023

KIN Food Halls | 2/F, Devon House, Taikoo Place, Quarry Bay

13:45–14:00	Workshop Check-in
14:00–17:30	Expert-led Workshops

TRACK A

Impact Investing
Strategy and Design

14:00–15:30 How to Compare
Sustainable Investing Strategies

15:45–17:15 How to Design
Community-centred Pilots

TRACK B

Impact Investing
Governance & Measurement

How to Design Family Office
Governance & Impact

How to Strategize Impact
Measurement & Management (IMM)

17:15–17:30	Cross-share & Mingle
17:30–18:00	Impact Social Check-in
18:00–18:30	Impact Spotlights
18:30–20:30	Impact Social

Our Summit Moderators

ALVIN LI

SFi Member, Entrepreneur, Impact Consultant, Professor

Alvin is a sustainability consultant, impact investor and policy researcher. Alvin co-founded The Kommon Goods, a green products provider offering eco-friendly products. He was named Global Shaper by the World Economic Forum, and invited to speak at international conferences like UN COP25 and WTO. Alvin is a board advisor for Zero Foodprint Asia.

He holds a Masters in Management and Masters in Social Innovation, both at the University of Cambridge, and is currently completing his PhD in Public Policy at HKUST. He is the recipient of the HKUST RedBird PhD Award for Outstanding Performance 2021/22.



CHRISTINE YU

SFi Innovation and New Impact Society Lead, Entrepreneur, Financial Expert, Angel Investor

Christine's career spans over 20 years across impact finance, venture building and the international capital markets. The majority of Christine's career was in the institutional debt capital markets at HSBC in both Hong Kong and New York. She is Co-Founder of Sophia, a financial education platform which helps companies tackle the gender investing gap. She also co-founded a non-profit organization called Girls Just Wanna Have Fund\$ focused on helping women prioritise their financial future,

She holds a BA in Political Science from the University of Chicago and an MBA from The University of Chicago Booth School of Business.



Why us? Why now? Starting our journey of reflection & exploration in a uniquely Asian context, with the *Tale of Evolution*.

How would you tell a story of impact investing in Asia? What role would each of us play? In the race to meet the Global Goals by 2030, how are Asian changemakers paving the way?

SFi will share our view on the great opportunity at hand, riding on recent momentum in the region. It's time to draw on our unique heritage & values, while setting our collective ambitions higher, further, together.

SPEAKERS

ANNIE CHEN

Founder and Chair, RS Group (HK)

Annie is the Chair of RS Group, and she believes we should, and can, “invest in the future we want to create”. Besides challenging RS Group to invest its own capital sustainably, Annie also seeds/supports innovative philanthropic or impact investing strategies to mainstream environmental and social considerations in the wealth management context within Asia. RS Group has incubated and launched the [Sustainable Finance Initiative](#), a private investor community platform that aims to promote and drive demand for sustainable finance, and is currently developing a “[Natural Capital Initiative](#)”, aimed at deploying catalytic capital to support innovative investment solutions that can protect and enhance natural capital in Asia



SPEAKERS

KATY YUNG

Managing Partner, SFi

Katy is Managing Partner of Sustainable Finance Initiative (SFi), a platform for Impact Investors and Experts "Where Capital Meets Purpose". Katy leads the strategic direction of SFi with a vision to mainstream Impact Investing in Asia via the group's key areas of focus: SFi Circle (memberships), SFi Hub (unlocking capital) and SFi ED (training and upskilling).

Katy has served as Director of Investment at RS Group, a HK-based family office focused on sustainability since 2010. She led the family office's transition from a traditional investment portfolio to one that is 100% sustainably invested. Katy remains as consultant to RS Group.



Day 1 | 09:50

Icebreaker: 2 Degrees of Separation

We're 2 degrees from world destruction, so to speak, and also just 2 degrees of separation from other changemakers instrumental to our impact goals.

Let's get to know each other; take a pulse check on interests, opinions, frustrations. We challenge you to meet those who seem very different and start to look for an accountability partner for your commitment to action at the end of the day.

Impact Pioneer Showcase

On the long, winding journey toward our visions of purpose-led business, how does an influential Asian family steer its people and portfolios toward embedded social impact?

Hosted by UBS, we ask two early adopters and sisters to candidly share their stories - from guiding mission, legacy factors and watershed moments, to success cases, failed experiments and ongoing challenges. In all this, what are the cultural and contextual nuances unique to Asian families, to keep in mind as we build the movement?

Hosted by Amy Lo | Co-Head Wealth Management Asia Pacific, UBS Global Wealth Management

SPEAKERS

AMY LO

Co-Head Wealth Management Asia Pacific,
UBS Global Wealth Management

Amy is Co-Head of Wealth Management Asia Pacific, UBS Global Wealth Management, Head and Chief Executive of UBS Hong Kong. Since joining UBS in 1995, she has held a number of senior management positions including Regional Head of Ultra High Net Worth and Global Family Office in Asia. Amy chairs the Executive Committee of the Hong Kong Private Wealth Management Association (PWMA), and is a Board Member of the Hong Kong Financial Services Development Council (FSDC)



SPEAKERS

VANESSA CHEUNG

Group Managing Director, Nan Fung Group (HK)

Vanessa is the Group Managing Director of Nan Fung Development Ltd., managing the Group's global real estate development portfolio. She is also the Founder of The Mills – a revitalization project of transforming the Nan Fung Textile Mills into a global innovation techstyle destination comprising of art, start-up incubator and experiential retail. She currently spearheads the Group's SEWIT framework, which stands for social cohesion, environmental sustainability, wellness, innovation and technology.

She is also a convener of NarrativeHK and the co-owner of Asphodel Fitness and Performance.



KAREN CHEUNG

Trustee & Chief Strategist, The D.H. Chen Foundation (HK)

Ms. Karen Cheung is the Trustee and Chief Strategist of The D. H. Chen Foundation, a family philanthropic trust established in 1970 by Dr. Din Hwa Chen who also established the Nan Fung Group. With the aspiration of building a compassionate society, the Foundation has been initiating and supporting innovative, sustainable and impactful programs, in order to realize Dr. Chen's philosophy "Care for others as well as you would care for yourself".

She also serves on Ronald McDonald House Charities Hong Kong, Pamela Youde Nethersole Eastern Hospital and CHAT (Centre for Heritage, Arts and Textile).



Pathways to Impact

Delving further into varied pathways to integrating impact, we explore three families' journeys to creating impact through their investments, philanthropy, and business. Hosted by [The ImPact](#), we will hear the challenges and successes of how these families have approached building family alignment, setting up family offices, and how they pursue impact through investments and personal activities.

Hosted by Pearline Yum | Director of Operations, The ImPact (SG)

SPEAKERS

PEARLINE YUM

Director of Operations, The ImPact (SG)

Pearline is the Director of Operations at The ImPact, a global network of families committed to making more impact investments more effectively. Pearline also works closely with families in Asia and is responsible for community management, partnerships, and ecosystem building in the region. Prior to graduate school and joining The ImPact, Pearline was a regulator with the Monetary Authority of Singapore, overseeing U.S. banks operating in Singapore.



FERNANDO SCODRO

Director, Grupo Baoba (SG)

Fernando Scodro is leading the ESG and impact investing arm of his family office, Grupo Baoba. The family built and exited Brazil's second largest confectionary company as well as other vertically-related operations and currently have milling operations, a real estate portfolio and a fund of funds. Fernando devised an ESG integration strategy for all of his family's assets and is currently implementing them across the portfolio starting with the VC and financial assets. Fernando also sits on the Global Board of The ImPact.



SPEAKERS

VICTORIA BUT

Director, Sun East Group (HK/China)

Victoria But is an impact enabler. After working in her family business of equipment manufacturing solution provider, she started her impact investment journey from being a passive investor to an active investor where she can bring more value to the businesses by being the bridge between the East and the West. She is particularly interested in circularity and innovative technology which focus on combating climate change.



WILLIAM GONDOKUSUMO

Founder, Campaign for a Better World (SG/Indonesia)

William Gondokusumo is a passionate social entrepreneur and impact investor. As a third-generation member of an Indonesian family, he advocates for sustainable wealth management and the role of families in shaping social and environmental impact. William founded Campaign.com, recognized as Google Play Indonesia's Best App for Good 2020. He holds a degree in Finance from Boston University, where he graduated summa cum laude.



Lightning Pitches

Hear from 5 boundary-pushing impact entrepreneurs from the region, all tackling diverse issues & selected from nominations – each looking for partners to reach their growth ambitions.

In 3 minutes flat, each founder will tell you the story of why & how their startup is building a better future. You'll have 1 minute to “bid” your interest with a name card for a simple connection. These are the innovators disrupting our broken systems, actively combining purpose and profit. Who will you support?

SPEAKERS

CALEB CHIU

CTO, [Neurum Health](#) (諾安科健)

Neurum Health personalises mind and lifestyle health care at-scale for people-first businesses and insurers for every mind's growth and healing. This is done via a digital platform powered by AI to personalise care journeys for every unique individual end-to-end. The vision is bringing mind and lifestyle care to life — top-quality, truly accessible, and sustainable care for everyone directly where we live, work, play, and learn.



ANTONIO NG

Founder & Director, [Formwork IO](#)

Formwork IO applies Whole Life Carbon Thinking to design revolutionary products that help developers and asset managers win the Net Zero Embodied Carbon race, boosting their contribution to reducing the world's embodied carbon. As an upfront and Scope 3 carbon specialist, they give developers and asset managers access to a wide range of scalable carbon negative and neutral materials that can drastically reduce upfront carbon and Scope 3 emissions in the construction and building industry.



SPEAKERS

ALDRIN YIM

CEO, [Codex Genetics](#)

Codex is a genomics company focused on improving patient outcomes through digital precision medicine. By leveraging a proprietary bioinformatics architecture and a clinical trial matching platform, they aim to accelerate the drug discovery and approval process. Codex is specialised in the oncology, neurology and rare disease area.



CAO ZHEHOU

Founder/CEO, [Jimi Biotech](#)

Jimi Biotech was founded in 2021, when it debuted the first cultivated beef in China. Jimi is a cultivated meat company that produces delicious meat directly from animal cells, without slaughtering. The company has made significant scientific breakthroughs to bring costs down, and are dedicated to continue this trend.



ROBIN WONG

Founder & CCO, [TeamSolve](#)

TeamSolve is a pioneer in smart water analytics and digital water, building innovative solutions with the most forward-thinking utilities in the world. Their Digital Knowledge Companion for the workforce addresses the mounting challenge of knowledge drain in the industrial and utilities world, which is costing businesses and employees alike in the form of high operating costs, mismanaged responses and a disengaged workforce.



Open Mic: Call for Collabs

Hear from a few family offices looking for collaborators on new impact investing projects, as we seek to promote joint efforts between private investors.

SPEAKERS

ADA YIP

Founding Director, WYNG 43 Social Investment

Ms Ada Yip is one of the Founding Directors of WYNG 43 Social Investment, a company which invests in financial and human capital in early stage mission-driven companies. Ada also acts as the Chief Empowerment Officer at Urban Spring, a purpose-driven company with a mission to reduce the consumption of single-use plastic bottles through building a reliable physical and digital network of well-designed and well-maintained water refill stations. Prior to these ventures, she was the Program Director of the i2i (incubation to investment) program at SOW Asia. She sits on the board of Social Value International, the Hong Kong Institute of Social Impact Analysts and B Lab Hong Kong & Macau.



ROBERT KIM

Managing Director, JLIN LLC

Robert is a Managing Director at JLIN, a mission-driven firm established by a professional basketball player Jeremy Lin to impact culture. At JLIN, Robert is incubating an impact investing venture around the “Redefine Love” theme in Asia/US. Robert is living in Korea and also serves on the Investment Committee of Access Ventures, a private operating foundation that has invested 100% of its endowment in impact investments. Prior to JLIN, Robert managed several family offices and foundation endowments at Caprock, a \$8B+ multi-family office and a founding B-Corp member.



More than a generation label, “Next Gen” is a way of thinking & doing, very often with purpose at the core. Let’s hear from 3 ambitious leaders steering their business empires toward sustainable and inclusive growth strategies. We explore personal journeys to strengthen their own leadership capacity, as well as the enormous task of integrating sustainability at scale. We touch on active stewardship from a stakeholder capitalism lens, and examine what Asia’s brand of impact looks like, to set the scene for three roundtables.

Hosted by Ronald Chan | Chief Investment Officer, Chartwell Capital (HK)

SPEAKERS

RONALD CHAN

Chief Investment Officer, Chartwell Capital (HK)

Ronald Chan founded Chartwell Capital in 2007 and currently serves as Chief Investment Officer and Co-Portfolio Manager.

Ronald is a member of the Public Shareholders Group and the Listing Committee of the Securities and Futures Commission of Hong Kong. He is also an Independent Non Executive Director of Hong Kong Ferry and Powerlong Commercial Management Holdings Ltd., an international committee member of the Hong Kong M+ Museum, a committee member of the Hong Kong Biotech Development Council of the Hong Kong Science and Technology Park and the Hong Kong Trade Development Council’s Greater Bay Area Working Group. He served as a member of the Listing Committee Panel of The Stock Exchange of Hong Kong Limited from 2016 to 2022.



SPEAKERS

JAMIE LEE

Associate, Happiness Capital (Lee Kum Kee family) (HK)

Jamie Lee is a 5th generation member of the Lee Kum Kee family. She currently works at the venture capital arm Happiness Capital as an Associate, participates on the board of H Properties, and serves as a Family Council member. Previous to joining the family business in Hong Kong, she led business development at various startups in San Francisco, including Findo, an enterprise search company that was later acquired by Visier. She holds a dual undergraduate degree in Economics and Political Science and a Masters in Media and Communications from the London School of Economics.

**ADRIEL CHAN**

Vice Chair, Hang Lung Group & Hang Lung Properties (HK)

Adriel Chan is the Vice Chair of Hang Lung Group and Hang Lung Properties and also chairs the Sustainability Steering Committee.

Adriel is a Vice President and Executive Committee member of the Real Estate Developers Association of Hong Kong, and is Chairman of the Committee of Overseers of Morningside College at the Chinese University of Hong Kong. He sits on the HKUST Business School Advisory Council, is a Court member of the University of Hong Kong and a Council Member of the Academy of Chinese Studies.

**REBEKAH LIN**

Director, Jia Foundation (SG)

Rebekah is passionate about starting conversations around longevity, mental health and end-of-life care. She has 13 years of experience in the private equity and equity crowdfunding space, working primarily in investor relations, marketing and portfolio management. She runs her family's foundation, Jia Foundation and is also Singapore's Country Director for Nexus, a global collective that unites next-gen philanthropists, impact investors and social entrepreneurs. Rebekah is also Co-Founder of The Social Co., the team that have raised \$5 million for more than 50 charities in Singapore.



Experts open with insights for participants to share their own experiences, challenges & approaches to 3 topics (choice of track): (A) Leading Radical Transformation / (B) Active Stewardship / (C) Asia's Brand of Impact

A. LEADING RADICAL TRANSFORMATION

Designed for heads of families and principals, we will untangle the enormous complexities of pursuing radical change at scale.

Here, we aim to understand the underlying motivation and family firms' north star for transformation. We will explore whether it is the moral obligation to leave the world a better place by using family businesses as a force of good, or the responsibility and compliance family firms need to adapt in this new age.

Starting with expert insights from a family business coach, our host will guide you in unearthing common barriers through case sharings and leadership tips, under Chatham House rules.

HOST

MARSHALL JEN

Executive Director, G. Li & Company

Marshall is the Executive Director and Principal of G. Li & Company. With over 15 years of experience in the family advisory and education industry, Marshall spearheaded multiple projects for the first listed education company as the Vice President of Asia Pacific. Marshall left his family business in 2019 to pursue a journey in family business research and advisory with The Chinese University of Hong Kong, Centre for Family Business in the capacity of a Project Director. His research focuses primarily on Succession Planning, NxGen Learning and Development, Business Family Leadership, Corporate Governance and Entrepreneurship. Marshall continues his involvement in Education as he lectures about Family Business, Corporate Governance and Entrepreneurship at CUHK and HKUST.



B. ACTIVE STEWARDSHIP OF YOUR PORTFOLIO

Designed for those managing impact investments, venture capital & experimental projects.

We invite you to explore how we steer our portfolio toward impact goals, in any form of stewardship & partner engagement. Guided by our prompts, it's time to exchange experience and perspectives, while hearing examples from Europe, the Americas & Asia. What does it mean to be a responsible steward of family wealth & proactive investor in impact?

HOST

WILSON TAN

Managing Director, Center for Sustainable Finance and Private Wealth Singapore (CSP) (SG)

Marshall is the Executive Director and Principal of G. Li & Company. With over 15 years of experience in the family advisory and education industry, Marshall spearheaded multiple projects for the first listed education company as the Vice President of Asia Pacific. Marshall left his family business in 2019 to pursue a journey in family business research and advisory with The Chinese University of Hong Kong, Centre for Family Business in the capacity of a Project Director. His research focuses primarily on Succession Planning, NxGen Learning and Development, Business Family Leadership, Corporate Governance and Entrepreneurship. Marshall continues his involvement in Education as he lectures about Family Business, Corporate Governance and Entrepreneurship at CUHK and HKUST.



C. ASIA'S BRAND OF IMPACT

Designed for anyone driving social impact & sustainability, to unpack what "impact" looks like across Asia vs. the West, in a dialogue on trends, approaches and stakeholder engagement approaches within the context of our regional backdrop.

What does "social impact" mean in practice to Asian families? Is "impact" in Asia essentially leapfrogging to sustainable, inclusive economic development in emerging markets? Are "purpose" & "equity" foreign concepts? How do we strengthen Asian changemakers' voices on the global stage?

HOST

MICHAEL AU

Managing Director, District Capital

Michael Au manages Hong Kong-based impact investment firm District Capital. He developed the firm's strategy to invest across private to listed equity strategies which proliferate solutions for the future of public health, sustainable food, and the climate crisis.

Michael dedicates his work to developing the Asian impact investing ecosystem, supporting capacity building, policy development, and advocacy. He currently serves on the boards of the Sustainable Finance Initiative, Toniic, Hong Kong Council of Social Service's Investment Fund, and other impactful ventures.



Tale of Collaboration

The *Tale of Collaboration* shines a spotlight on the importance of seeing the big picture, finding allies and working together to achieve scalable impact.

SPEAKERS

POMAN LO

Founding Managing Partner, AlphaTrio Capital

Poman Lo is the Vice Chairman of Century City International Holdings Limited and Vice Chairman and Managing Director of Regal Hotels Group. She is the Founding Partner of AlphaTrio Capital, an Asian-focused sustainable technology fund empowering the next wave of green tech unicorns to provide disruptive solutions for the world's most pressing environmental challenges. She serves as an Adjunct Professor, teaching sustainable business management at The Hong Kong University of Science and Technology and founded the non-profit Institute of Sustainability and Technology to nurture the next generation of ESG talent.



Thematic Clusters

We all face common challenges on the road to scalable impact. This is your chance to learn from peers and experts working on the same thematic areas or operational sticking points. Choose your theme and draw on our collective intelligence to invite new perspectives and rapidly brainstorm solutions.

Themes: Youth Empowerment, Climate Investing, Intergenerational Poverty, China ESG, Emerging Markets, Sustainable Portfolios, Strategic Philanthropy and Corporate Venture Impact.

In each breakout, an expert sets the scene, one changemaker shares a real challenge, and the group serves as a sounding board to share their approaches & experience. At the end, hear quick takeaways from

SPEAKERS

① Youth Empowerment

ARTHUR SHEK

Co-Founder, Project Melo

Arthur is a Co-Founder of Project Melo, a not-for-profit platform dedicated to empowering youth in Hong Kong. He sits on the Board of Junior Achievement Hong Kong. Arthur is also the Managing Partner of McKinsey's Hong Kong office. He focuses on driving holistic and sustainable change at companies especially in Hong Kong and Mainland China and Asia. He has led many transformation efforts with multinational financial institutions, local conglomerates, public organizations, advising on strategy, digital, innovation, and more. He is the co-lead for McKinsey's work in fintech in the region.



② Climate Investing

TASOS ZAVITSANAKIS

Head of Sustainable Finance Greater China,
APAC Sustainable Finance Office, UBS

Tasos is Head of Sustainable Finance for Greater China within the APAC Sustainable Finance Office where he is responsible for driving Sustainable Finance business initiatives. His focus is on client and regulatory engagement, thought leadership development, capacity building, and forging strategic partnerships in the sustainability ecosystem. Tasos, specializes in Decarbonisation strategies supporting clients in formulating Credible and Just Transition Plans and Impact towards Net Zero. In addition, he leads UBS's global Carbon working group and has represented UBS in the global industry Taskforce for Voluntary Carbon Offset Markets and developing UBS's Carbonplace infrastructure.



SPEAKERS

③ Intergenerational Poverty

LEHUI LIANG

Chief Impact Capital Officer, Social Ventures Hong Kong (SVhk)

Lehui Liang is the Chief Impact Capital Officer at Social Ventures Hong Kong (SVhk), an impact purpose organisation founded in 2007. The Impact Capital team designs new platforms to synthesise capital - ranging from funds to real assets to networks and knowledge - from partners across all sectors and enables these resources to have a social impact in enriching Hong Kong's communities. Lehui is also the Senior Manager, Hong Kong for AVPN, a Singapore-based funders' network committed to building a vibrant and high impact social finance community across Asia. Lehui graduated from Wellesley College and is an avid hiker of Hong Kong's trails.



④ China ESG

MAGGIE TSUI

Executive Director, Pictet Asset Management

Maggie joined Pictet Asset Management in 2021 covering intermediaries in Asia ex Japan.

Before joining Pictet she was a Client Relationship Manager at UBS Asset Management. Prior to that she was a Global Investment Specialist at JPMorgan Private Bank. She started her career at Deutsche Bank in their Private Wealth Management division and became a Portfolio Consultant upon completion of the graduate trainee program. Maggie holds a double degree of Bachelor of Laws and Bachelor of Business Administration (Law) from University of Hong Kong, and obtained the CFA Institute Certificate in ESG Investing. She is also a CFA and CAIA Charterholder.



SPEAKERS

⑤ Emerging Markets

GUNEET BANGA

Executive Director, The Caravel Group

Guneet Banga is an Executive Director at The Caravel Group, a Hong Kong-based diversified conglomerate with three key areas of business: maritime, commodities and investment management. He is an active proponent of conscious capitalism, which guides his investment approach in impact and sustainability start-up ventures that focus on climate change solutions and mitigation technologies. In 2022, Guneet established Caravel Sustainable Investments (CSI), a dedicated vehicle for the Group's investment management activities focused on impact, ESG and sustainable investing. He is also a General Partner of Aera VC, a Singapore-based portfolio company which invests in deep tech sustainability ventures. Guneet recently received the 'Global Visionary – Impact & Sustainability' award by the Vision World Academy in India.



⑥ Sustainable Portfolios

JUDY ZHANG

Managing Director, Cambridge Associates (HK)

Judy is a Managing Director in Cambridge Associates' Beijing office. Judy has worked with a variety of institutional investors (sovereign wealth funds, family offices, endowment and foundations, and insurance companies) with assets ranging from \$100 million to \$30 billion, on asset allocation, manager selection, and portfolio construction. She has also led a number of private equity and venture capital investment due diligence efforts.

During business school, Judy studied at the Yale investment office and was a summer fellow at Kaust Investment Management Company, a large Saudi Arabia endowment, specializing in investment strategy, asset allocation, and hedge fund evaluations.



SPEAKERS

⑦ Strategic Philanthropy

STACEY CHOE

COO, Asia Philanthropy Circle (SG)

Stacey is passionate about working with leading Asian philanthropists on furthering their strategic philanthropy in the region. She served as the Membership Services Director at the Asian Venture Philanthropy Network for four years before her last role as Director of Policy Engagement. She spent three years in China as the marketing director of a boutique Italian consulting company, specialising in communications, events management, market research and strategy. In Singapore, she was responsible for regional incentive and rewards programmes at Intel Corporation, and prior to that, Stacey worked in the government sector on nationwide campaigns relating to social cohesion and national identity.



⑧ Corporate Venture Impact

KIRIL POPOV

Innovation Consultant, Eureka Nova

Kiril Popov is an innovation consultant at Eureka Nova and the founder of Faculty Ventures. At Eureka Nova, Kiril specializes in investments and venture development. Previously, Kiril led programs and partnerships at Explorium, the innovation hub of Fung Group, and served as a senior analyst at Coresight Research, a US-based consumer research and advisory firm. In these roles, he collaborated with businesses to identify and cultivate growth opportunities within the consumer and supply chain sectors.

Kiril has a background in project and structured finance, and holds an MBA from New York University's Stern School of Business. He is passionate about using innovation and sustainable design principles to solve real-world problems.



SUMMIT PARTNERS

Thank you to our partners
for taking action,
and championing impact in Asia

RE-IMAGINING THE POWER OF INVESTING. CONNECTING PEOPLE FOR A BETTER WORLD.

We all know finance has a powerful influence on the world. At UBS, we reimagine the power of people and capital, to create a better world for everyone: a fairer society, a more prosperous economy and a healthier environment. That's why we partner with our clients to help them mobilize their capital towards a more sustainable world. And it's why we've put sustainability at the heart of our own business too.


Read SFI's full writeup on UBS' [Three Things in Impact](#) which includes [the rise of the impact economy](#) and [investing sustainably-and nimby](#).

SUMMIT CO-HOST

UBS convenes the global ecosystem for investing, where people and ideas are connected and opportunities brought to life, and provides financial advice and solutions to wealthy, institutional and corporate clients worldwide, as well as to private clients in Switzerland. UBS offers investment solutions, products and impactful thought leadership, is the leading global wealth manager, provides large-scale and diversified asset management, focused investment banking capabilities, and personal and corporate banking services in Switzerland. The firm focuses on businesses that have a strong competitive position in their target markets, are capital efficient and have an attractive long-term structural growth or profitability outlook.

“Finance has a catalytic role to play, to solve some of the biggest challenges in the world. As a global leading wealth manager, we are in a privileged position. We have access to wealth and we know where the needs are so we can connect them together, delivering a real impact on a truly global scale”

–Amy Lo, Co-Head Wealth Management Asia Pacific,
UBS Global Wealth Management



“We expect the next decade to be of consolidation and acceleration in responsible innovation and investing. Increasingly, governments, investors, and entrepreneurs are working in pursuit of a more sustainable world economy and responsible innovation is the brightest path to a better future, for investors and for the planet.”

–Rosa Sangiorgio, Head of ESG,
Pictet Wealth Management

Pictet is a leading independent investment firm with more than two hundred years’ experience. Headquartered in Geneva, we are present in 30 financial centers across the world with offices in Asia in Hong Kong, Shanghai, Taipei, Singapore, Tokyo and Osaka. As long-term investors, we aim to direct capital to the real economy in a manner that improves the state of the planet. We do this by building responsible partnerships with our clients and the companies in which we invest.

“Every civilisation, every generation, has faced times that required an abundance of courage, imagination and resilience. We live in such a time, where the existential threat we face as a species requires all of us to do what we can to collectively transform our entire global system, and in doing so, save humanity and our only home.”

–Guneet Banga, Executive Director,
The Caravel Group

The Caravel Group is a diversified conglomerate headquartered in Hong Kong SAR, with three distinct business areas: maritime, commodities, and investment management. Through its multiple operating units, the Group provides value-added solutions in distinct but complementary areas, while focusing on identifying and capitalizing on selected opportunities within each. The Group has operations across 18 countries, and subsidiary companies include Fleet Management Limited, the world’s second largest ship management company. The Group also has a Caravel Sustainable Investments arm focusing primarily on climate technology and decarbonization.

IMPACT PARTNERS

InvestHK's mission is to attract and retain foreign direct investment which is of strategic importance to the economic development of Hong Kong. We work with overseas and Mainland entrepreneurs, SMEs and multinationals that wish to set up an office – or expand their existing business – in Hong Kong.

We offer free advice and services to support companies from the planning stage right through to the launch and expansion of their business.

Cambridge Associates is a global investment firm. The firm aims to help pension plans, endowments & foundations, healthcare systems, and private clients implement and manage custom investment portfolios to generate outperformance so they can maximize their impact on the world. With 50 years of institutional investing experience, the firm has helped to shape and implement investment best practices and built strong global investment networks with the purpose of driving outperformance for clients. Cambridge Associates delivers a range of services, including outsourced CIO, non-discretionary portfolio management, staff extension and alternative asset class mandates.

**“Green Fintech
can enable corporates to
become more competitive
in any industry amid
the evolving business world”**

–InvestHK

**“At Cambridge Associates,
we have been helping our clients
invest with their values for nearly
50 years. We believe that clients
do not have to choose between
long-term portfolio returns and
positive real-world impact.
By building sustainable and
solutions-oriented portfolios today,
we aim to deliver resilient, future-
proof portfolios tomorrow.”**

–Judy Zhang, Managing Director,
Cambridge Associates

COMMUNITY PARTNERS

Audacy Ventures is a principal investment firm dedicated to backing early-stage climate tech ventures. Founded in 2017 by a team of experienced energy and investment professionals, the firm primarily focuses on three verticals: clean energy production and storage, mobility and transport, and carbon removal and utilization. To date, they have invested globally into companies in areas such as point source carbon capture, hydrogen mobility and infrastructure solutions, energy storage applications and along the SAF value chain.

illio is a research analytics company, specialising in delivering wealth analytics digitally to both businesses and individuals. illio aims to bring efficiency to portfolio analytics through clear and sophisticated visualisation, as well as proprietary Insights that help investors, wealth managers or family office advisors focus on the key drivers of each portfolio. illio has analysed over US\$3bn+ of assets on its proprietary platform since its inception.

BlueOnion is an innovative sustainability fintech empowering responsible investment decisions leveraging global data in climate, environmental, social, and governance metrics, providing a multilayered framework for research, investing, and stewardship. The BlueOnion cloud-based products provide data-driven insights, analytics, and ratings for over 40k companies, 300k funds, 130k ETFs, and any bespoke portfolio assembled by the investor. BlueOnion is in Hong Kong, Singapore, Taiwan, Malaysia, and London.

“The greatest threat to our planet is the belief that someone else will save it.”

- Audacy Ventures

“[We hope] to see impact investing become a core part of any portfolio instead of a nice to have. There is still a way to go before impact investing becomes integral to any investment decisions, however, these conversations need to originate with us, and slowly they will be client led as well.

- Sofia Sacre,
Growth Marketing
Manager, illio

“Bona fide responsible investors have moved past the lack of globally accepted standards or taxonomy. They are looking for earnest collaboration and intelligent, intuitive ESG data analytics to align with the new norm – ESG-correlated investment performance.”

- Elsa Pau,
Founder & CEO, BlueOnion

COMMUNITY PARTNERS

Cathay Pacific Airways is Hong Kong's flag carrier, offering passenger and cargo services to around 200 cities in Asia, Europe, North America, Africa and Australia. Underscored by its ongoing commitments and progress in achieving its sustainability goals, the airline company has targeted to achieve net-zero carbon emissions by 2050, making it one of the first airlines in Asia to establish a timeline for making carbon neutrality a reality.

CSP SG is an independent nonprofit that works in collaboration with the CSP Zurich at the University of Zurich. It is a pioneering research center advancing sustainability finance and private wealth, and the first and only university unit that works at the intersection of wealth owners, wealth managers, researchers, regulators and the public sector to mobilize private wealth toward impact.

The Impact is a global membership community of families committed to aligning their assets with their values. As a non-profit organization, The ImPact unifies the voice of investors in order to catalyze the action and collaboration necessary to solve the world's most intractable problems.

SUPPORTING PARTNERS



Roger King Center for Asian Family Business and Family Office
金樂琦亞洲家族企業與家族辦公室研究中心



Impact Social

Evening drinks and networking with the wider Hong Kong Impact & ESG ecosystem. Workshop ticket includes entrance to the Impact Social which will be held from 17:30-20:30 on May 25.

Featuring ‘Impact Spotlight’ pioneer speakers from overseas on their personal journeys to impact across investing, philanthropy and business.

What are their visions for Asia’s impact investing movement?

What mindsets and actions can we each bring home?

SPEAKERS

Alvin Li | Head of Impact, ANF Family Office

Rebekah Lin | Director, Jia Foundation

Elisa Khong | Group Managing Director, KSK Society

Khailee Ng | Managing Partner, 500 Global

Katy Yung | Managing Partner, SFi

TRACK A. IMPACT INVESTING STRATEGY & DESIGN

A1—How to Compare Sustainable Investing Strategies

Interactive workshop and card game to introduce different sustainable investing approaches. Come learn best practices, Do's & Don'ts for true “impact” and understand the range of tools in sustainable finance. Based on CSP's advocacy, training and internationally-adopted frameworks, this session will equip you with a sharp radar for choosing your ideal impact investing portfolio while avoiding greenwashing.

Hosted by Center for Sustainable Finance & Private Wealth (CSP) Singapore | Wilson Tan, Managing Director

HOST

WILSON TAN

Managing Director, Center for Sustainable Finance & Private Wealth (CSP) Singapore

Over two decades, Wilson has been a global business leader in various industries. His unique experiences from alternate assets, to industrial, and to marketing communication showcase agility, broad thinking, and an embrace of diverse experiences and perspectives to thrive. Wilson led large-scale corporate development, launched a hedge fund, and advocates global peacemaking with a nonprofit. His multi-lateral experiences and broad network across domains enables him to build sustainable businesses in a changing world.

His focus at CSP Singapore is on capacity building and research and training to help wealth owners and wealth managers mobilize their capital, firms, and societal gravitas for sustainable development and impact investing.



TRACK A. IMPACT INVESTING STRATEGY & DESIGN

A2—How to Design Community-centred Pilots

Hands-on workshop to promote a community-centric approach to impact projects, designed for impact investors & partnership builders to practice co-creation alongside frontline stakeholders. Led by a social innovation “do-tank,” hear creative cases of community pilots for social good, before you & peers practice rapid human-centred design to tackle any social or environmental issue with frontline participation & diverse perspectives.

Hosted by The Good Lab | Warren Luk, CEO

HOST

WARREN LUK

CEO, The Good Lab

Warren serves as CEO of Good Lab, an award-winning non-profit social innovation Think-and-Do Tank in Hong Kong committed to fostering community participation and collaboration for social impact.

Driven by the conviction that every individual has the potential to be a changemaker, Warren has been at the forefront of numerous large-scale public and social sector innovation initiatives. In doing so, he has established ground-breaking cross-sector collaborations between community organisations, NGOs, and the Hong Kong government. With a fervent interest in civic engagement, Warren employs Design Thinking as a means to co-create with local communities, understand people's needs, and reconcile differing viewpoints among stakeholders.



TRACK B. IMPACT INVESTING GOVERNANCE & MEASUREMENT

B1–How to Design Family Office Governance & Impact

Fireside chat with case stories from HK & China to explore different approaches to family office governance in the Asian family context. Designed for family principals and teams seeking to crystallize mission, vision & succession – as applied to social impact. Based on HKUST’s research examples, SFi invites you & peers to exchange on how these practices could accelerate your impact journey in a family setting.

Co-hosted by SFi & HKUST Roger King Center for Asian Family Business & Family Office | Prof. Winnie Qian Peng (彭倩教授), Director

HOST

PROF. WINNIE QIAN PENG

Director

Professor Winnie Qian Peng is Director of Roger King Center for Asian Family Business and Family Office, Director of Thompson Center for Business Case Studies, and Adjunct Associate Professor of Finance at HKUST. She is also the only Asian board member of International Family Enterprise Research Academy (IFERA). Professor Peng is currently a columnist at Hong Kong Economic Times and China Family Business Review. Professor Peng offers family business and family office courses at HKUST, and tailor-made programs for family owners around the world. Professor Peng received her Bachelor’s degree in Accounting from Tsinghua University, and her PhD degree in Finance from HKUST.



TRACK B. IMPACT INVESTING GOVERNANCE & MEASUREMENT

B2–How to Strategize Impact Measurement & Management

Interactive case sharing on best practices in IMM from Asian investors, revealing nuances to evaluating impact in private debt & equity, vs. public equity funds. Guided by GIIN and SFi, hear examples from RS Group (HK) and investment boutique Arisaig Partners (Singapore). Dive deep with Q&A, then brainstorm with peers how you could apply different IMM approaches to your impact strategy.

Co-hosted by SFi & Global Impact Investing Network (GIIN)

HOST

MAUD SAVARY-MORNET

Senior Advisor, GIIN

Maud brings over 30 years of experience in ESG, impact investment, international development in the private and public sector in emerging markets.

Maud is the founder of Beyond Finance consulting HK, a consulting company supporting asset owners and asset managers implementing a strategy in impact investing. She is the senior advisor Asia for the GIIN, the Global Impact Investment Network, strengthening the impact investing community and building engagement with institutional investors. She is member of the investment committee of Emerging Markets Impact Investment Fund trust (EMIIF), a fund of funds set up by the Department of Foreign Affairs and Trade to support SMEs and gender lens investing in Asia Pacific. She also serves as advisor in several companies.



TRACK B. IMPACT INVESTING GOVERNANCE & MEASUREMENT

CASE

LILIAN WANG

Research Director (Impact & Engagement), Arisaig Partners

Lilian is Research Director (Impact & Engagement) for Arisaig Partners. She joined Arisaig in May 2020 in London before moving to the Singapore office in December 2021. At Arisaig, she is responsible for impact measurement and management, as well as reporting on impact. She also looks after ESG integration and oversees the Research Team in engagement and proxy voting. Prior to joining Arisaig, she was with PwC for 13 years, including 10 years in the Sustainability & Climate Change team where she specialised in impact measurement and management. She has a BA in Mathematics from University of Cambridge, a MSc from LSE in Environmental Economics & Climate Change, and is a Chartered Accountant with ICAEW.



HOST

KATY YUNG

Managing Partner, SFi

Katy is Managing Partner of Sustainable Finance Initiative (SFi), platform for Impact Investors and Experts "Where Capital Meets Purpose". Katy leads the strategic direction of SFi with a vision to mainstream Impact Investing in Asia via the group's key areas of focus: SFi Circle (memberships), SFi Hub (unlocking capital) and SFi ED (training and upskilling).

Katy has served as Director of Investment at RS Group, a HK-based family office focused on sustainability since 2010. She led the family office's transition from a traditional investment portfolio to one that is 100% sustainably invested. Katy remains as consultant to RS Group.



SFi Membership



Sustainable
Finance
initiative

WHO WE ARE

[Sustainable Finance initiative](#) (SFi) is a platform for Impact Investors and Experts "Where Capital Meets Purpose". Our vision is to mainstream Impact Investing in Asia and position ourselves as a sandbox for building community, unlocking capital and learning through our three areas of services (see "What We Offer").

OUR HISTORY

SFi was incubated in 2018 by [RS Group](#), a Hong Kong-based family office focused on sustainability with over a decade of experience in the sustainable finance industry.

WHAT WE OFFER

1 [SFi Circle](#)

Join an inspired and engaged community of impact investors in Asia through a variety of curated events and receive the most up to date news, research reports and trends on Sustainable Finance.

2 [SFi Hub](#)

Access SFi's curated directory of Companies and Fund Managers in the Impact Space for active Asia-based Investors.

The screenshot displays the SFi Hub directory interface. It features a grid of investment opportunities, each with a logo, name, and key details. A detailed view of the Circulate Capital Ocean Fund I-B is shown on the right, including its mission, LP base, and impact summary.

Investment Opportunity	Asset Class	Close Date	Geography
Circulate Capital Ocean Fund I-B	VC Fund	Q2 2023	South Asia, Southeast Asia, US, EU, Australia
FormWork	Company	Currently raising	HK
Quadria Capital Quadria Capital Fund III LP	PE Fund	Q3/Q4 2023	South Asia, ASEAN
Plastics for Change	Company	TBD	India, Southeast Asia
Energy Revolution Ventures	VC Fund	TBD	TBD
Urchinomics	Company	TBD	TBD
Verge Verge HealthTech Fund II	VC Fund	TBD	TBD
Burnt Island Ventures	VC Fund	TBD	TBD

Circulate Capital Ocean Fund I-B
The first investment firm dedicated to advancing the circular economy and fighting ocean plastic and climate change in South and Southeast Asia. Circulate Capital Ocean Fund I invests in growth stage SMEs across the circular plastic value chain, while Circulate Capital Disrupt (Fund I-B) is a Southeast Asia based companion fund that benefits from the pipeline and diligence work of Circulate Capital Ocean Fund.

LP Base
Unilever, DFC, USAID, EIB, IFC, Proparco, Pepsico, Coca Cola, Danone, Mondelez, Chevron, Chanel, Dow, P&G, Jøbsen & Jøson, Builders Vision, Twynam, Rumah Group, North East Group, Eden, Impact Capital, SK2Fund, Align Impact, Minderoo Foundation

Impact Summary

- Vision/mission statement with impact elements
- ESG/impact policies in place
- Impact/ESG strategy integrated with investment strategy
- Portfolio companies tackle affordability/accessibility issues
- Team with Impact Experience
- Existing impact LPs
- Tracking impact KPIs/impact report available

Fundraising Details

Asset Class: VC Fund	Close Date: Q2 2023
Targeted Fund Size: USD 50 million	Impact theme: Circularity
	Geography: South Asia, Southeast Asia, US, EU, Australia

3 [SFi Education](#)

Bespoke online and offline Impact Investing courses led by seasonal practitioners currently working in the sustainable finance field via New Impact Society



SFi Membership

OUR MEMBERS

Our Members are active and engaged impact investors looking to increase their deployment into sustainable finance investments.

- Wealth owners
- Family office
- Family led businesses



MEMBER TESTIMONIALS



SALLY TSAI & WAYNE CHANG
FOUNDER & STRATEGIST,
AFFINITY IMPACT



ALVIN LI, HEAD OF IMPACT,
ANF CAPITAL

“SFi was instrumental in helping us start on our impact investing journey. We didn't know where or how to begin but SFi provided us both the inspiration and the due diligence guidance that led to our first impact investment.”

“Being an SFi member is such a delight! On top of gaining regular access of high quality impact deals, we also get to walk our impact journey side-by-side with other like-minded families and change-makers. As part of the SFi family, we no longer need to walk our path alone.”

MEMBERSHIP DETAILS

- Annual membership from USD5,000/year
- Includes: Monthly bespoke Events & Socials, Access to SFi Hub, New Impact Society Education courses, etc
- Discounted access to SFi Family Impact Summit

Email us or follow our social media links below:

<https://www.linkedin.com/company/sustainablefinancehk/>
<https://sustainablefinance.hk>

SFi Membership

Join now

SPECIAL THANKS TO SUPPORTING PARTNERS

CO-HOST



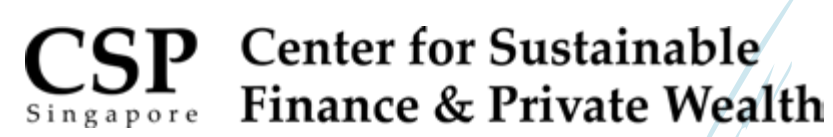
NETWORK PARTNERS



IMPACT PARTNERS



COMMUNITY PARTNERS



SUPPORTING PARTNERS



Email us or follow our social media links below:

<https://www.linkedin.com/company/sustainablefinancehk/>

<https://sustainablefinance.hk>



**Sustainable
Finance**
initiative