

Roundtable Participants

CFA Institute gathered qualitative data for the report through 23 virtual roundtables conducted with industry leaders and practitioners in various locations across the globe. The people listed below* participated in one of those roundtables. Their attendance does not necessarily indicate their endorsement of the study or its contents. We are grateful for their input as well as that of the Future of Finance Advisory Council and Future of Finance Content Council.

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**The roundtables consisted of these individuals listed above, in addition to a number of participants who did not explicitly grant us permission to publicly list their names*

Organizations Represented

The following organizations were represented at one or more of the virtual roundtables that provided qualitative data for this report. Readers should not assume that their participation indicates an endorsement of the report or its contents. We are grateful for their input.

Abbot Downing	CIBC Private Wealth Management	JGP Asset Management
Aberdeen Standard Investments	Cleveland Foundation	JP Morgan Asset Management
ABN Amro Bank	Colchester Global	JP Morgan Asset Mgt
Actiam	Credit Suisse	JP Morgan Chase Mexico
Aegon Asset Management	Danske Bank	Julius Baer
Afore CitiBanamex	Deka Investment	Kempen Capital
Afore Sura	Deloitte	LGIM
AIA	DSP Investment Managers	Lombard Odier
Allfunds Bank	Ecube Investment Advisors	Loomis, Sayles & Co.
Allianz Global Investors	EFG Asset Management	M&G
AllianzGI Sustainable Investing	Eighteen48 Partners	Maitri Asset Management
AMIB	Everbright Securities	Man Group
Amundi	Fiar Impact	Manulife
Amundi Pioneer	Fidelity International	Marquette Associates
ANBIMA	Fiduciary Trust	Melior Investment Management
Asset Management One	First Sentier Investors	Merian Global Investors
AXA	First State	MFS
Axis MF	Fitch Ratings	MGA Consulting
Balanced Equity Management	Franklin Templeton	Mirova
Banco Inter	Gitterman Wealth	Moody's
Banco Sicredi	GMO	Morgan Stanley Huaxin Fund
BBVA Asset Management	Great Lakes Advisors	Morningstar
BBVA Asset Management Mexico	Groupama Asset Management	MSCI
BlackRock	Harvest Fund	Nasdaq
Bloomberg	Hawthorn Responsible Investing	Natixis
Bloomberg Intelligence	Hemenway Trust	NN Investment Partners
Blue Sky Group	HSBC Bank	Nomura Research Institute
BNP Asset Management	ICICI Prudential AMC	Northern Trust
BNP Paribas Wealth Management	IHS Markit	Northern Trust Asset Management
Brazilian Capital Markets Investors' Association	Income Research + Management	Ossiam
BTC Pactual Chile	Indianapolis Zoo	Ostrum
Cambridge Associates	Intermediate Capital Group	Paribas
CDPQ	Invesco	Pendal Group
	Japan Catalyst	Pension Protection Fund

Organizations Represented, continued

Pictet	Trio Consultoria
PIMCO	TrustPlus Wealth Managers
Pingan Fund	UBP Investments
PNC AM	UBS Asset Management
PNC AM	UN JSPF
PNC WM	USS
PRIM	UTI Funds
Prima AFP	Vanguard
Principal Asset Management Mexico	VisionDom
Profuturo Mexico	Vontobel
Promethos Capital	Wellington Management
Quantum AMC	Wells Fargo
Rabo Bank	William Blair
RBC Global Asset Management	Willis Towers Watson
RBC Wealth Management	
Regnan	
Riverbend Advisors	
Robeco	
Rokos Capital Management	
S&P Global	
Sanso Investment Solutions	
Santander Bank Auto	
SASB	
SBI Funds Management	
Schroders	
SEB Bank	
Securities Commission Mexico	
Shinsei Corporate Investment	
Stance Capital	
Standard Chartered Bank	
State Street Global Advisors	
Steward Redqueen	
Stewart Investors	
Towne Ryan & Partners (Law Firm)	