

**INVESTMENT
WITH THE FUTURE
PRICED IN**



WELCOME TO THE SNOWBALL AGM

Growing numbers of investors recognise that current investment priorities are changing. Many agree that delivering more of the same is running out of time.

The financial system needs a more sustainable and better quality return.

Snowball is an ambitious investment manager setting the standards now for tomorrow's markets.

You can join and follow the conversation on Twitter
at [#SnowballAGM2023](#) and [#BetterInvesting](#)

C. Hoare & Co.,
Fleet Street,
EC4Y 1BT

Wednesday
26th April
14:00 - 17:30



PROGRAMME

14:00	REGISTRATION Welcome and meet the team over tea and coffee.	Main entrance C. Hoare & co.
14:15	WELCOME Snowball momentum with Daniela Barone Soares and Janine Nicholls.	Jubilee Room
14:30	IMPACT AND FINANCIAL PERFORMANCE Sean Farrell, Jake Levy joined by Samantha Duncan, CEO of Net Purpose.	
15:20	EXPLORE THE PORTFOLIO Alice La Trobe Weston chairs a deep dive into the Snowball portfolio. Meet investees in the Snowball portfolio as we share the positive impact they are creating in social equity and environmental sustainability, taking the opportunity to explore the competitive advantage of impactful companies. You'll hear from.	
16:15	NETWORKING BREAK Break for tea and coffee.	
16:30	GLOVES OFF DISCUSSION To lead us into drinks and under Chatham House rules, Campbell Fleming, CEO, AssetCo plc will chair a "gloves off" discussion tackling the top misperceptions we hear about impact investment. We'll let the audience vote to decide what is needed to deliver better investment with the future priced in!	
17:30	DRINKS RECEPTION Connect with our community of investors who, like you, have realised that investment priorities have changed.	The Counting House
20:00	EVENT CLOSE If you have questions or themes you would like us to cover at the event, please email hello@snowball.im . To learn more about Snowball at snowball.im and follow the conversation on LinkedIn and Twitter using #BetterInvesting and #SnowballAGM2023	



SNOWBALL PEOPLE

TEAM

BOARD



Daniela Barone Soares
CEO
 Previously: Impetus, Granito, BancBoston Capital
 Non-Exec: IHG plc, Institute for the Future of Work.



Sean Farrell
CIO
 Previously: Partners Capital, 3i, TDR Capital, TPG Capital, Goldman Sachs



Janine Nicholls
COO
 Previously: GHO Capital, Hermes GPE.
 Non-Exec: Calculus VCT plc.



Alice La Trobe Weston
Senior Investment Manager
 Previously: Morgan Stanley Investment Management
 Non-Exec: Pilgrim Trust



Laura Boyle
Head of Marketing
 Previously: Withersworldwide
 Non-Exec: Digital Opportunity Trust, The Impact Branch



Henry Bacon
Head of Investor Relations, Finance & Operations
 Previously: Santander, CaixaBank, MUFG
 Pro Bono: The Avenues



Jake Levy
Investment Manager
 Previously: Big Society Capital
 Non-Exec: Creative Mentor Network



Jemima Lyon
Associate
 Previously: Investec W&I (placement)



Pavandeep Kasbe
Finance and Operations Associate
 Previously: Mainspring Fund Services Limited



Cindy He
Business Development Manager
 Previously: Fosun Capital, Infaith Capital



Alexander Hoare
 C. Hoare & Co., Golden Bottle Trust



James Perry
 Cook, B Lab UK, Panahpur



Kelly Clark
 The Laudes Foundation, Good Fashion Fund



Colin Baines
 Border to Coast Pensions Partnership



Patricia Lewis
 Harvard University Advanced Leadership Programme



Jack Goldstein
 Skagen Conscience Capital



Danielle Walker Palmour
 Friends Provident Foundation



LEADERSHIP COUNCIL



Campbell Fleming
(Co-Chair)

CEO: AssetCo plc.
Chairman and Director: The
Big Exchange



Rhian-Mari Thomas OBE (Co-Chair)

CEO: Green Finance Institute.
Former Global Head of Green
Banking, Barclays.



Sarah Gordon

Former CEO now
Senior advisor: The
Impact Investing
Institute



Nick Hurd

Chair of the Global
Steering Group for
Impact Investment



Jouja Maamri

Director of Climate
Philanthropy,
Impatience Earth



Sir Jonathan Porritt

Environmentalist and
writer



Professor Nick Robins

Sustainable Finance
Professor, LSE



Bhavini Shah

CEO & Co-Founder:
CityHive



Pelicitas von Peter

Founder: Active
Philanthropy



Bryony Worthington

Crossbench member
of the House of Lords



Suzanne Biegel
Gender Smart
Investing



Katie Gordon
Sustainable
Investment and
Business



Erik Bruun Bindslev
Merika Advisory



David Hunter
Renewity



Plum Lonax
New Philanthropy
Capital



**Michelle Kathryn
Essomé**
Birman Ventures



Ana Yang
Chatham House



Michael McCreles
Impact Frontiers



Paolo Fresia
100% Sustainability



Laurie Spengler
Courageous
Capital Advisors
LLC



Andy Schofield
The Transformational
Index



Sarah Forster
The Good Economy



Nils Johnson
Impact Advisers
Capital



Hugh Sinclair
Microfinance
Transparency

EXPERT NETWORK



SPEAKERS

IMPACT AND FINANCIAL PERFORMANCE



Sean Farrell, CIO

Sean was drawn to Snowball by the opportunity to play a role in transforming how assets are managed and in leveraging the power of commercially-driven investment to have positive and large-scale impact beyond what government and philanthropy can do alone.

He has deep experience in private markets and multi-asset class investing, both through direct investing and selection of asset managers. Sean was a founder of Nephin Capital, an investment and advisory firm and was previously Global Head of Private Markets for Partners Capital, a leading OCIO (Outsourced Chief Investment Office) firm with \$40B+ assets under management. At Partners Capital, he also ran multi-asset class portfolios for clients ranging from charitable endowments to pension funds to high net worth individuals.

Prior to Partners Capital, Sean worked in direct private equity investing at 3i, TDR Capital, TPG Capital and Goldman Sachs. He has an MBA from Harvard Business School and a degree in Computer Engineering from Trinity College Dublin.



ALICE LA TROBE WESTON, Senior Investment Manager

Alice joined Snowball after a career spanning over 20 years in the fixed income asset management business in London and New York. Given the vital role the allocation of capital will serve to solve global environmental and social problems, she brings her financial knowledge and experience to add to her belief that investing decisions are crucial to solving these challenges. Alice is a trustee of the Pilgrim Trust, which supports social welfare and heritage projects in the UK, as well as a trustee of Water Harvest, working towards sustainable water solutions in India.



JAKE LEVY, Investment Manager

Jake joined Snowball as he believes in a responsible and fair financial system which works for society and the environment. Having previously worked as a solicitor, Jake transitioned into impact investing through the On Purpose leadership programme, working at Big Society Capital and then in the impact investing team at Guy's and St Thomas' Charity. Alongside his work, Jake has also serves as a Trustee at the Creative Mentor Network and has recently completed a term as a school governor at the London Enterprise Academy.





PORTFOLIO SHOWCASE

Our underlying investments are full of inspiring stories of how investment capital can be used to create tangible positive change whilst making a return for investors. We've invited just a small selection of our fund managers and a CEO of an underlying holding company to tell you about their innovation in social equity and environmental sustainability.

You'll hear from the following fund managers.



PETER STEIN, The Lyme Timber Company

Peter joined Lyme in 1990 and has significant experience in conservation-oriented forestland and rural land purchases and dispositions. Peter develops conservation sale strategies on properties being evaluated or managed by Lyme and also leads Lyme's conservation advisory business. Prior to his career with LTC Partners and Lyme, Peter was Senior Vice President of the Trust for Public Land where he directed conservation real estate acquisitions in the Northeast and Midwest. Peter lectures frequently at graduate schools and professional conferences on conservation investment structures and strategies. Peter serves on the Investment Committee of Sustainable Land Management Partners' US focused agricultural land investment fund. He also serves on the advisory boards of the Appalachian Mountain Club, Rose Smart Growth Real Estate Fund No. 1, Upstream Technology, and Quantified Ventures. Peter is the co-founder of the Conservation Finance Network and the International Land Conservation Network. In addition, he is a former Board Chair of the Land Trust Alliance, served as a founding Commissioner of the Land Trust Accreditation Commission. Peter earned a B.A. with Highest Honors from the University of California at Santa Cruz in 1975 and was a Loeb Fellow and received a Certificate in Advanced Environmental Studies from Harvard University in 1981.



ZOË VANDERWOLK, ETF Partners

Zoë joined ETF Partners as Head of IR and Sustainability in 2019. Following a degree in statistics, she practiced for five years in the City of London in the Environmental Finance group at Baker & McKenzie LLP. In 2013 she co-founded Accessible Clean Energy LLP, a listed fund investing across the clean energy value chain. She is a trustee of the Mvumi Trust, a charity supporting bursaries and facilities and is the first boarding school in Tanzania integrating visually impaired and able-bodied students. She is a graduate of Harvard College (BA, Class of '05) and the College of Law, London (LLB (Distinction), 2008).





PORTFOLIO SHOWCASE

SIMON EAVES, Capital Dynamics

Simon is a Senior Managing Director, Co-Head of the Clean Energy team and member of the Executive Committee. He has approximately 30 years of energy, power and infrastructure related experience. Prior to joining Capital Dynamics, Simon spent six years in the infrastructure investment team of the Abu Dhabi Investment Authority where he was Global Head of Utilities, responsible for sourcing, executing and managing all utility related investments for ADIA. Prior to ADIA, Simon established and managed one of the first private equity funds focused on investing in the energy and infrastructure sectors in the Middle East. He started his career as a power developer both in the UK and internationally, before heading teams focused on power generation project financing and advisory at Sumitomo Bank and Standard Bank in London. Simon holds a bachelor's degree in Electronic and Electrical Engineering from Swansea University.



KATIE CRITCHLOW, NatureMetrics

Katie oversees all activities at NatureMetrics, spanning all teams from science and data to operations and business development. Katie holds an MSc in Environmental Economics and Climate Change from LSE, and a BSc in Biology from Oxford University. Katie has 18 years' experience in corporate strategy, innovation and partnership development for a green economy. With M&S, Katie developed Plan A in the supply chain and led a team that were developing global sustainable products and supply chains, including wood, palm oil, cotton and fish. Whilst based in Jakarta with WWF, Katie helped to deliver a Green Economy strategy for Borneo. Katie ran for parliament in 2019, and has experience running green start-ups in the energy and biosciences industries. Katie has a vision to revolutionise nature data provision which she is actively pursuing with NatureMetrics.





“GLOVES OFF” DISCUSSION

Together with the audience, we are tackling the top four misperceptions we hear about impact investment. Help us establish what is needed to deliver better investment with the future priced in!



CAMPBELL FLEMING, Co-chair Snowball Leadership Council, CEO, AssetCo plc. Chairman and Director, The Big Exchange

Campbell Fleming is an Australian businessperson who has been the head of 5 different companies and currently holds the position of Chairman of The Big Exchange Ltd. and Chief Executive Officer & Director at AssetCo Plc. He previously held the position of Global Head-Distribution & Marketing at abrtn Plc, Chief Executive Officer at Threadneedle Asset Management Ltd., Chief Executive Officer of Threadneedle Investment Services Ltd. and Managing Director at JPMorgan Asset Management (UK) Ltd. Campbell David Fleming received an undergraduate degree from The University of Sydney.



DANIELA BARONE SOARES, CEO, Snowball

Daniela is excited about systemic solutions for a healthy, prosperous and peaceful future in this planet. She has over 15 years' experience as a CEO and Board member at the intersection of the commercial and impact worlds, starting her career in private equity and venture capital investing and then spending nine years at the helm of Impetus. Daniela serves as non-executive director on the business responsibility committee of IHG Plc. She is a Trustee of the Institute for the Future of Work and a Senior Advisor for the Forward Institute.

She was selected by the Financial Times and Inclusive Boards as one of the top 100 women in engineering (2019) for her work as NED at Halma Plc, by Brazil's Istoé Dinheiro magazine as one of "20 People who are Changing Brazil and the World for the Better" (2017) and by the Independent on Sunday as one of 100 people who make Britain a better place ("Happy List" 2008). She holds a MBA from Harvard Business School and a BSc in Economics from Unicamp.





“GLOVES OFF” DISCUSSION



PETER BAXTER, Former CIO of Snowball and current Chair, Snowball Investment Committee

Peter joined Snowball because he believes that the social and environmental problems faced by current and future generations are too big to be solved by governments and philanthropy, and that asset owners and managers must get fully involved. Peter was previously CEO and CIO at Old Mutual Asset Managers UK and has over 30 years' experience in asset management. Peter is a trustee and chair of the Social Enterprise Committee at Trust for London, a charitable foundation tackling poverty and inequality in London, and is Senior Independent Director at Civitas Social Housing plc.



JANINE NICHOLLS, COO

Janine believes that asset owners and managers can, and should, deliver significant social returns in conjunction with realising solid financial returns. She has more than 20 years' experience in private equity investment and operations, most recently as COO of the healthcare investor GHO Capital. Janine is a non-executive Director and Chair of the Audit Committee at Calculus VCT plc and is a Trustee of Sevenoaks Hockey Club, a registered charity promoting health and wellbeing through community sport and volunteering. She qualified as a chartered accountant with Price Waterhouse, holds the Investment Management Certificate, an MBA from INSEAD and a BSc(Econ) from the London School of Economics.





WHAT THEY SAY

“ Our investment committee felt in particular that Snowball provided a unique offering to the market in impact investing. The EIRIS Foundation supports this and would like to promote it as a responsible investing option for charities. We are delighted to have an option that offers both measurable impact and competitive risk-adjusted returns.

Peter Webster,
The EIRIS Foundation

“ At the Impact Investing Institute we're delighted to see asset-owners going beyond ESG's risk management approach and instead contribute solutions to global problems with their investments. The EIRIS Foundation's selection of Snowball following their public tender is great evidence of that shift — a partnership that will yield deep impact and a compelling financial return.

Impact Investing Institute



WHAT THEY SAY

“ Snowball is consistently one of the most thoughtful investors we have at Bridges from an impact management perspective - we appreciate your support and challenge to continually improve!

Maggie Loo,
Partner,
Bridges Fund Management

“ Mainstream markets are not serving the interests of investors or the public anymore. Impact investment is the answer.

Alexander Hoare,
Partner & Director,
C. Hoare & Co.

www.snowball.im

 SNOWBALL

BE PART OF:

INVESTMENT
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Invest in Snowball: email us on
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