



Preparing the Capital Markets for the Purpose-Driven Economy

Known as the Purpose Generation,¹ Millennials already represent 50% of the U.S. workforce² and are emerging as the next generation of managers, executives, and institutional and retail investors. They believe **business has a responsibility to be transparent about its values, make a positive contribution to society and align financial performance with its principles and corporate purpose** – the key elements of the developing purpose-driven economy.

In partnership with corporate executives, the CEO Investor Forum provides the tools and platform to enhance and communicate their sustainable long-term strategies to investors and other key stakeholders including employees, customers, suppliers, and communities. **Through a proprietary content framework, advisory services, and events, the Forum empowers CEOs to proactively:**

1 Set the Context

Establish the agenda to build trust and confidence in your company's mission.

2 Own the Narrative

Reorient the expectations of investors and stakeholders for the next 3-5 years.

3 Lead for the Future

Create a path to achieve a sustainable and fair valuation on a company's long-term prospects.

Proven Market-Tested Solution

35 CEOs

presented Sustainable
Long-Term Plans

+\$2T

aggregate market cap of
presenting companies

*"We recognize that for many companies, providing **forward-looking information**, particularly detailed information regarding future operating conditions and resource needs, may present difficulties, including because any shift to a forward-looking health and welfare strategy is at most in its incipient stage. As time passes, and our strategies come into greater focus, making and refining theses estimates should become less difficult."*

- SEC Chairman Jay Clayton, April 8, 2020³



*"It is through the groundbreaking efforts of the **CEO Investor Forum** that companies and investors can change the impact businesses have on the world."*

- Bill McNabb, CEO Investor Forum Co-Chair & Former Chairman & CEO, Vanguard



The CEO Investor Forum in Action

The **Sustainable Long-Term Plan** changes the conversation companies have with investors from short-term earnings expectations to sustainable long-term value creation. In partnership with KKS Advisors, Professor George Serafeim, and institutional investors, the Forum's proprietary Sustainable Long-Term Plan Framework empowers CEOs to articulate their long-term strategy across **9 themes** and **22 forward-looking, decision-relevant disclosures**:



Competitive Positioning



Corporate Purpose



Important Trends



Corporate Governance



Risks & Opportunities



Human Capital



Long-Term Value Creation



Financial Performance



Capital Allocation



Engage with the
CEO Investor Forum

ANNUAL MEMBERSHIP BENEFITS:

- **Sustainable Long-Term Plan Framework:** Review of public filings and disclosures against our proprietary guidelines.
- **1:1 Briefing w/ Forum's Research Team:** Video call to discuss findings of review.
- **Ongoing Education & Resources:** Webinars and thought leadership from experts in ESG and long-term value creation.
- **CEO Investor Forum Event Access:**
 - Annual flagship CEO Investor Forum
 - Virtual executive workshops
 - Peer networking
- **Digital Portal Access:** Interactive modular Long-Term Plan tool, access to peer analysis and insights.

**Bespoke advisory services also available, please contact us for more information.*



Connect with the
CEO Investor Forum

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