

Media Contact:

Jackie Albano
646.863.1926
jalbano@cecp.co

CEO Investor Forum Launches Advisory Services to to Empower CEOs to Refocus Investor Expectations Towards the Long Term

CEO Investor Forum Enhances Guidance on ESG Integration

SEPTEMBER 16, 2020, NEW YORK, NY— The [CEO Investor Forum \(the Forum\)](#), the capital markets engagement arm of [Chief Executives for Corporate Purpose \(CECP\)](#), announces the launch of a new suite of tools and advisory services designed to empower CEOs and their executive leadership teams to navigate the quickly changing capital markets landscape and the emerging purpose-driven economy.

“Now more than ever, investors are carefully evaluating a company’s material environmental, social, and governance (ESG) practices and their resiliency in the face of crisis,” said **Nandika Madgavkar, Head of the CEO Investor Forum, CECP**. “The Forum’s tools and advisory services support CEOs seeking to demonstrate their long-term strategic and operational decisions to sustain their businesses and relationships with key stakeholders.”

While markets have been adapting to this new paradigm in recent years, the perfect storm of events in 2020 has accelerated the shift in market expectations. Most recently, the guidance to corporate issuers regarding the importance of producing more forward-looking disclosures by [SEC Chair Clayton and Director Hinman](#) has reinforced the mission of the Forum to refocus investor expectations toward the long-term. Other calls from the market include **Chairman of Blackrock Larry Fink’s** Annual Letter to Shareholders and new guidance from The World Economic Forum.

The Forum’s proprietary Long-Term Plan framework is designed to help CEOs structure their forward-looking narrative across 9 themes and 22 decision-relevant investor questions.

Developed in partnership with **Professor George Serafeim of Harvard Business School and KKS Advisors**; long-term institutional investment managers and asset owners including **Blackrock, State Street, and Vanguard** (see [Advisory Board](#) members); and [Brian Tomlinson](#), the Forum’s **Research Director**, the framework provides corporate issuers (CEOs) with the guidance they need to communicate their sustainable long-term strategy.

To date, CECP’s CEO Investor Forum has partnered with over 35 of the world’s leading CEOs and their companies, such as [GlaxoSmithKline, Voya, JetBlue, Nestlé, Allstate, UPS, PMI, and others](#), representing over \$2 trillion in market cap, to prepare and communicate their Long-Term Plan in a Reg FD environment. When working with leading companies, the Forum advises CEOs to apply a forward-looking lens to the existing ESG reporting standards to support their narrative with

consistent, comparable metrics for investors to measure and hold them accountable over a three- to seven-year horizon. The results and feedback from CEOs have consistently been positive.

"By presenting Voya's long-term strategy to investors at CECP's CEO Investor Forum, I was able to share a comprehensive story that included our environmental, social, and governance results, which are increasingly important to all stakeholder groups and speak to the character of our brand. I believe that this bigger picture of who we are...it is a significant differentiator for Voya," said **Rod Martin, Chairman & CEO, Voya Financial**.

The market has spoken, and the CEO Investor Forum is answering the call. The organization's newly created suite of services offers additional tools to guide CEOs as they refocus investor expectations toward long-term value creation, as well as provide support and guidance to CEOs on how to develop and communicate their long-term strategy to institutional investors and other key constituencies. Companies taking advantage of the organization's proprietary **content framework, advisory services, online tools, events, and benchmarking data** will be able to proactively set the context, own their narrative, and lead toward a sustainable future.

"It was 50 years ago this September that the economist Milton Friedman published his doctrine, which became a new narrative for business. That view is being challenged today as calls are made for business to focus on driving sustainable value versus merely short-term gains," said **Daryl Brewster, CEO, Chief Executives for Corporate Purpose**. "The new services and support offered by CECP's CEO Investor Forum will accelerate the progress of companies to make the shift to long-term sustainability and value creation."

Levering an increasing digitized world, the CEO Investor Forum engaged long-time partner Tata Consulting Services through a pro bono tech offering to create an exclusive web-based portal to deliver the Forum's unparalleled Long-Term Plan Builder and benchmarking tool.

"As a purpose-driven enterprise, we recognize the role of technology in creating value for all stakeholders. We are proud to partner with CECP's CEO Investor Forum in creating the digital platform to enable organizations and executives on a path to long-term sustainability," said **Surya Kant, Chairman, TCS North America**.

The CEO Investor Forum is honored to welcome **American Electric Power (AEP), Aptiv (APTV), and KPMG** as Founding Members of the new CEO Investor Forum Network. Leaders from these companies will partner with the CEO Investor Forum team and its **Chairman Bill McNabb, former Chairman of Vanguard**, to deliver on its mission to prepare the capital markets for the long-term.

"For too long, companies have sacrificed long-term value creation to generate short-term results, which erodes the sustainability strategic investors seek," said **Bill McNabb, former Chairman of Vanguard and Chair of the CEO Investor Forum Advisory Board**. "It's through the groundbreaking efforts of the CEO Investor Forum that companies and investors can change how businesses plan and act. CECP's CEO Investor Forum is the right organization to lead this transformation."

#

ABOUT THE CEO INVESTOR FORUM

The CEO Investor Forum is the capital markets engagement arm of Chief Executives for Corporate Purpose (CECP). Chaired by former Vanguard Chairman Bill McNabb, the CEO Investor Forum advises CEOs and their teams on developing and communicating their long-term value creation story to institutional investors and other key stakeholders. Through the Forum's research-driven, market-tested tools, bespoke advisory services, and flagship events, the Forum empowers CEOs to proactively set the context, own their narrative and lead for the future.

Publications including [*Reorienting Capital Markets Toward the Long-Term*](#), [*Emerging Practice in Long-Term Plans*](#), [*The Economic Significance of Long-Term Plans*](#), [*Method of Production of Long-Term Plans*](#), and [*ESG and the Earnings Call*](#) have been widely cited and republished in leading corporate finance journals and media. Access the complete collection of research that informs the new advisory services on the CEO Investor Forum's new [website](#) or connect with the CEO Investor Forum via [LinkedIn](#).

ABOUT CHIEF EXECUTIVES FOR CORPORATE PURPOSE

Chief Executives for Corporate Purpose® (CECP) is a CEO-led coalition that believes that a company's social strategy — how it engages with key stakeholders including employees, communities, investors, and customers — determines company success. Founded in 1999 by actor and philanthropist Paul Newman and other business leaders to create a better world through business, CECP has grown to a movement of more than 200 of the world's largest companies that represent \$11.2 trillion in revenues, \$23 billion in total community investment, 14 million employees, 30 million hours of employee engagement, and \$21 trillion in assets under management. CECP helps companies transform their social strategy by providing customized connections and networking, counsel and support, benchmarking and trends, and awareness building and recognition. Learn more at <http://cecp.co>.