

CEO Investor Forum

HOSTED BY THE STRATEGIC INVESTOR INITIATIVE, CECP

Chaired by Johnson & Johnson CEO Alex Gorsky and Vanguard Chairman Bill McNabb, CECP's Strategic Investor Initiative hosts the CEO Investor Forum. This invitation-only event is limited to presentations by CEOs of Fortune 500 companies and approximately 200 long-term-oriented, institutional investors and pension funds. The event is designed to redirect the traditional investor presentation focus from short-term events to a conversation that underscores and supports a corporate framework capable of generating long-term earnings per share growth.



Learn more about the Strategic Investor Initiative

The first convening of its kind, the inaugural CEO Investor Forum, came in response to the growing consensus of CECP's CEOs and leaders from the global investment community that the current market focus on short-term performance can adversely affect their ability to generate sustained value.

The CECP CEO Investor Forum featured senior leaders of six leading global companies presenting a new form of long-term plans that included social and traditional business considerations, as well as panel discussions with and presentations by distinguished thought leaders in the movement to usher in a new era of long-term planning.

Post-event materials of the CEO Investor Forum can be reviewed on our [website](#).

CEO Investor Forum Key Features

» 30-35 minutes for the CEO presentation followed by 5-10 minutes for the Q&A

- » CEOs identify key stakeholders and risks relating to how long-term value creation/preservation affects these groups
- » CEOs share their long-term plans and the short- and mid-term building blocks required for these plans
- » CEOs have the opportunity for additional one-on-one discussions with long-term investors

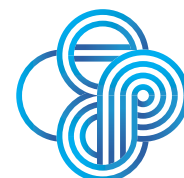
If your CEO is interested in presenting the company's long-term plan to the world's largest investors, please see next steps below:

1. CECP will arrange a call with your CEO and/or senior executives to share further session details
2. CECP will provide case studies/templates and presentation development support
3. CECP will assist in media outreach and financial disclosure considerations
4. CECP will arrange a final planning meeting with your CEO and/or executive leadership team

“For too long, companies have sacrificed long-term value creation to generate short-term results, which erodes the sustainability strategic investors seek.

It's through the groundbreaking efforts of the Strategic Investor Initiative that companies and investors can change how businesses plan and act. CECP, with the 200 global CEOs in their coalition, is the right organization to lead this transformation.”

—Bill McNabb, Chairman, Vanguard, & Co-chair, Strategic Investor Initiative



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ATTENDEES OF PAST CEO INVESTOR FORUMS INCLUDE REPRESENTATIVES FROM:

AllianceBernstein
Allianz Global Investors
Allstate Corporation
Amalgamated Bank
Ameriprise Financial
Ariel Investments
Assurant, Inc.
Aviva
Bank of America
Barclays
BlackRock
BNP Paribas
BNY Mellon
Boston Partners
Breckinridge Capital Advisors
Brown Brothers Harriman
Caisse de Dépôt et Placement du Québec
CalSTRS
Calvert
Cambridge Associates LLC
Charles Schwab Investment Management
Citi
ClearBridge Investments
Commerzbank
Cornerstone Capital Group
Credit Suisse
Deutsche Bank
Dimensional Fund Advisors
Domini Impact Investments LLC
F.B. Heron Foundation*
Fidelity Investments
Ford Foundation*
GAMCO Asset Management
Gitterman Wealth Management
Goldman Sachs
Great Lakes Advisors
GSAM
Guardian Life Insurance Company of America
Hermes Fund Managers Limited
Hermes Investment Management
HSBC Bank USA
ING Investment Management

J.P. Morgan Asset Management
J.P. Morgan Chase & Co.
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Lazard Asset Management
Legg Mason
Liberty Mutual
Lincoln Financial Group
Macquarie Group
Merrill Lynch
MFS Investment Management
Morgan Stanley
MSCI, Inc.
Nasdaq
Neuberger Berman
New York Life Investment Management
New York State Common Retirement Fund
Nordea Investment Management
Norges Bank Investment Management
Nuveen Asset Management
Pax World Management LLC
PIMCO
Prudential Financial Inc.
Pzena Investment Management
Raymond James
RBC Capital Markets
Rockefeller & Co.
Starboard Value LP
State Street
Stone Point Capital
SunAmerica Asset Management
TIAA
Trade and Development Bank
UBS Asset Management
USAA
U.S. Bancorp
Vanguard
Voya Financial
Wellington Management
Wells Fargo Asset Management
World Bank

Bold lettering indicates Strategic Investor Initiative Advisory Board member

**Indicates event sponsor*

SPEAKERS INCLUDE:

David Abney, Chairman & CEO, UPS
Steven Collis, Chairman, President & CEO, AmerisourceBergen Corporation
Kenneth Frazier, Chairman & CEO, Merck & Co., Inc.
Mauricio Gutiérrez, President & CEO, NRG Energy, Inc.
Omar Ishrak, Chairman & CEO, Medtronic Plc
Paul Polman, CEO, Unilever PLC
Mark Schneider, CEO, Nestlé
Timothy J. Sloan, CEO & President, Wells Fargo
Marco Tronchetti, Executive Vice Chairman & CEO, Pirelli
Emma Walmsley, CEO, GSK
Geisha Williams, CEO & President, PG&E Corporation
Tom Wilson, Chairman & CEO, The Allstate Corporation
AND MANY MORE...

“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 ... is a significant differentiator for Voya.”

—Rod Martin, Chairman & CEO, Voya Financial

About the Strategic Investor Initiative (SII) Leveraging CECP’s network of 200+ companies representing over \$7 trillion in annual revenues, the SII seeks to address constraints that inhibit corporations and investors from building resilient businesses and from creating sustained long-term value. The SII is a collaborative forum that seeks to fundamentally change the conversation between CEOs, Boards of Directors, and investors from short-term profits to sustained long-term corporate performance. The SII will provide tools and resources designed to introduce and support market behaviors that ultimately deliver sustained long-term value for all stakeholders. The SII will do this through a series of CEO Investor Forums, an annual conference, and on-demand advisory services available to CEOs and institutional investors seeking to share long-term plans and commitments.



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