INCR Membership Benefits

**Working Groups**

- **INCR Policy Working Group.** Investors in this working group engage federal and state policy makers on key climate, energy and sustainability issues through a variety of vehicles, including in-person meetings, letters, and op-eds. The Group also facilitates international investor collaboration on global investor statements and events. Meets monthly. To join, contact Brandon Smithwood, senior associate, at smithwood@ceres.org.

- **SEC/Disclosure Working Group.** The working group aims to move the SEC towards greater implementation of its climate change disclosure guidance (issued in February 2010), as well as to address other environmental, social and governance (ESG) issues with the goal of improving corporate disclosure on material risks and opportunities. Meets quarterly. To join, contact Jim Coburn, senior manager, at coburn@ceres.org.

- **Sustainable Stock Exchanges Working Group.** Offers investors engagement opportunities with stock exchanges on environmental, social and governance (ESG) issues, with the goal of improving exchanges’ guidance for listed companies through a listing standard on sustainability reporting. Meets monthly. To join, contact Tracey Rembert, senior manager, at rembert@ceres.org.

- **Integrated Reporting Working Group.** Provides a voice for investors in the global effort—coordinated by the International Integrated Reporting Council (IIRC)—to formulate a strong framework for integrated financial and ESG reporting. Meets every other month. To join, contact Tracey Rembert, senior manager, at rembert@ceres.org.

- **Investment Consultants Working Group.** Aims to engage the investment consulting industry—the so-called investment “gatekeepers”—in a dialogue around how environmental, social and governance (“ESG”) factors, including climate change, are integrated into their business and decision-making. To join, contact Kirsten Spalding, director, at spalding@ceres.org.

- **Investor Water Working Group.** Led by representatives at Ceres, Calvert, ICCR and PRI – the working group informs and coordinates investors on water-related company engagements, provides updates on recent reports, tools, and surveys and provides expert/industry led webinars. Meets quarterly. To join, contact Berkley Adrio, senior associate, at adrio@ceres.org.

- **Shareholder Initiative on Climate and Sustainability.** The network coordinates a coalition of investors engaging companies to foster improved sustainability and climate change-related business practices. The goal is to reduce long-term portfolio-wide risks and enhance returns. Meets monthly. To join, contact Rob Berridge, senior manager, at berridge@ceres.org.

**Networking Events**

- **INCR Annual Meeting.** Each year, members meet at the Ceres Annual Conference for a half-day strategy session. Includes opportunities for networking, shared learning, and collaboration.

- **Investor Summit on Climate Risk.** Since 2003, the biennial Investor Summit on Climate Risk at the United Nations has been the preeminent forum for leading institutional investors in North
• America, Europe and the rest of the world to discuss the implications of climate change for capital markets and their portfolios.

**Shared Learning and Guidance**

• **Engaging with Companies.** INCR includes some of the most active investors in shareholder engagement. Investors members are able to learn from fellow members, utilize Ceres industry expertise on environmental, social and governance (ESG) issues, and participate in investor-company collaborations like the Ceres Investor/Company/Labor Roundtable. Ceres staff industry expertise includes Oil & Gas, Electric Power, Insurance, Transportation and Water.

• **Publications, Research and Training.** Ceres staff continuously publishes reports and research papers on ESG topics. INCR members get special access to staff training and insight into these reports, which include *Proxy Voting for Sustainability*, *Disclosing Climate Risk & Opportunities in SEC Filings*, and the *Ceres Roadmap for Sustainability*.

• **Investment Practices.** INCR members engage with staff and collaborate between members on sustainable investing practices and issues of importance to asset owners and asset managers including proxy voting, ESG integration, RFPs, investment policies and management agreements, investment consultants, best practices and investment products and strategies across asset classes including fixed income/green bonds.

• **Letter to the Russell 1000 Companies on Sustainability.** In June 2011, investors representing more than $1 trillion in assets sent a letter to every company in the Russell 1000 Index asking them to embrace the “new reality” of ESG risks, and to consider using to Ceres Roadmap in addressing those risks.

• **INCR Listserv and Weekly Bulletin/Calendar.** Investor members can share new research and important developments with the entire network through the INCR Members Forum, the weekly INCR Bulletin that reports on INCR activities and major member accomplishments, and the weekly INCR Events Calendar of upcoming events and webinars.

*To learn more about INCR Working Groups and to receive weekly notices on upcoming calls, webinars and meetings, as well as the weekly INCR Bulletin, contact Siobhan Collins, associate, at collins@ceres.org*