



**Ethical Investment  
Association**

**UKSIF**

**Autumn 2012  
Meeting**

**Wednesday 5<sup>th</sup> September 2012**

**Sponsors: Pictet**

**Location: Moor House, Level 11  
120 London Wall  
London, EC2Y 5ET**

**Agenda**

10.30 – 11.00	<b>Registration</b> Tea / Coffee
11.00-11:20	<b>Welcome</b> inc Reminder / Update – UKSIF & the EIA Update/ discussion re functionality of website Handover to new EIA Chair
11:20-12:30	<b>Adviser Session</b> Topics for discussion (lead by members of EIA Steering Group) A) Wrap platforms and those most useful to ethical investors B) UCIS vs other specialist investments (eg social impact) but different regulatory rules C) Restricted vs. independent – the recent FSA paper clarified this quite well and it also led onto compliance linked issues such as what you can decide you ignore e.g. UCIS etc. D) Use of Centralized Investment Processes (CIP's) – e.g. DFM, DMS. Models etc – maybe one or two advisers would be willing to share their view/practice and open up for discussion?
12:30 – 13:15	<b>Lunch</b>
13:15 - 14:05	<b>Pictet</b> - our hosts & Sponsors will talk us through their thematic fund range, with a focus on the Timber Fund
14:05 – 14:15	<b>Break</b>
14:15 – 15:00	<b>Triodos Bank</b> - the launch of their new Investment ISA
15:00 – 15:45	<b>Suzannah Nicklin</b> - the Global Impact Investing Network
15:45 – 16:15	<b>Aviva</b> - update on the transfer of funds to Alliance Trust
16:15	Close
16:45	UKSIF AGM nearby!

If you have any queries or difficulties on the day, please contact Lisa Stonestreet on 07779 591049