

The Authentic Investor: A retreat to inspire and support people who want to make investment and finance sustainable

2.30 pm Saturday 11 August 2018 to 6.00 pm Tuesday 14 August 2018
Findhorn Foundation, near Inverness, Scotland



FINDHORN
INTERNATIONAL CENTRE
FOR SUSTAINABILITY

WHY?

The finance sector is starting to recognise the urgency of sustainability challenges, and the need to ensure that finance serves society better. Working to encourage and accelerate these trends takes energy and creativity. But long-established cultures, norms and behaviours are slow to change. Meaningful change on the scale we need does not just require ‘materiality’, ‘risk’ and the ‘business case’. It takes vision, values and passion. It takes authenticity.

Sustaining these takes effort. From time to time our batteries need recharging.

This retreat is designed to do just that. It will help us re-discover the authenticity of vision, values and passion for sustainability and a finance industry that serves society.

“Live your beliefs and you can turn the world around.”

- Henry David Thoreau

WHO?

This retreat is for anyone working in investment or finance who wants to make the financial system sustainable and align it with the needs of society. Previous participants have come from pension funds, asset managers, investment consultants, international organisations, investor networks, banks, financial planning firms and NGOs. People at all stages in their career are welcome. Previous participants have been from Denmark, Finland, Germany, Hong Kong, Italy, the Netherlands, Sweden, the UK and the US. The maximum size of the group will be 27 people.

WHAT?

A range of professionally facilitated activities, discussions and experiences will give us opportunities for reflection, exploration and connection – with ourselves and with each other. We will also explore how we can work together in the future to spread the concept of the ‘authentic investor’ and the values of sustainability more widely through the financial system.

No ‘keynotes’. No presentations on ‘issues’.
No ‘panels’. No corporate masks.

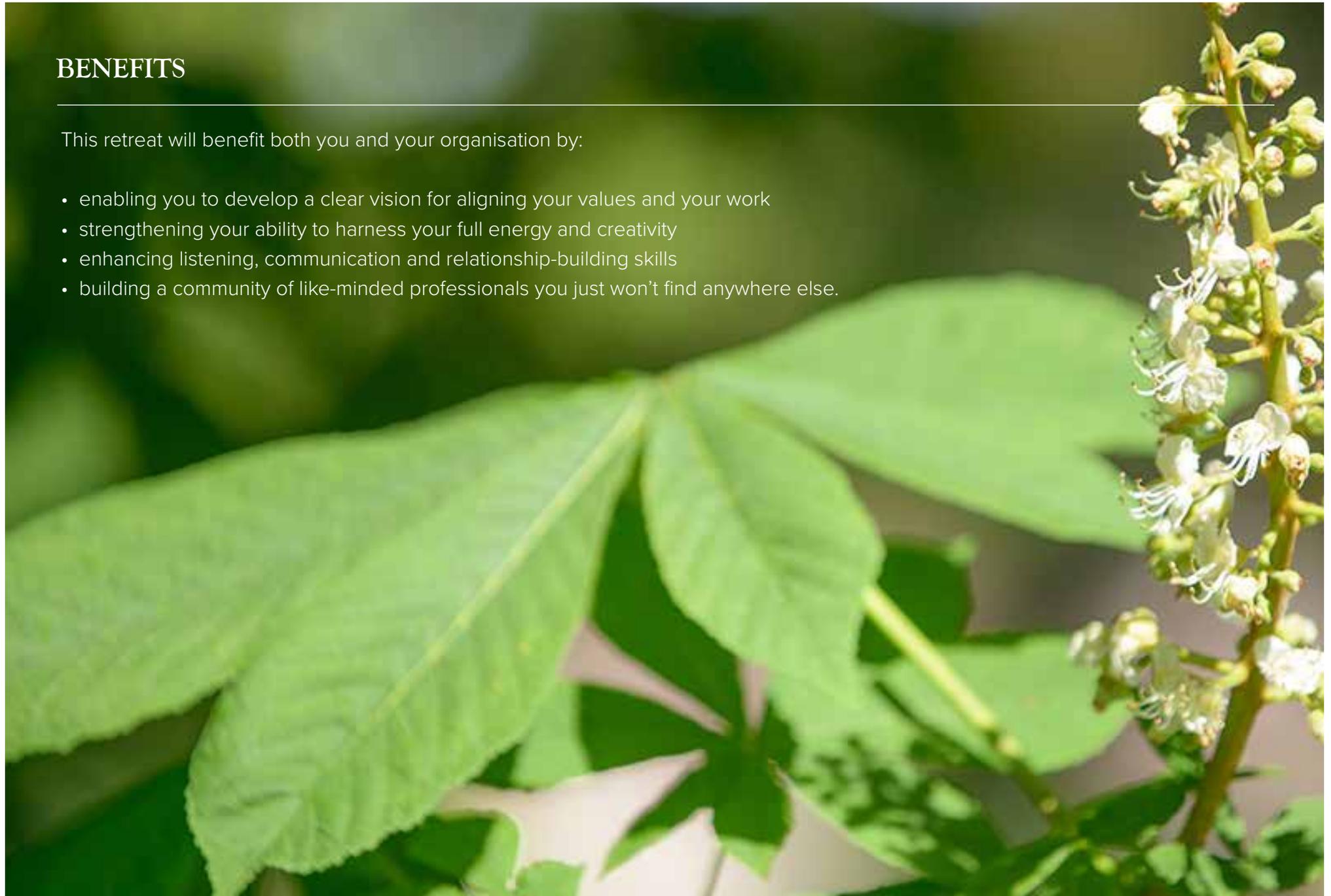
HOW WILL I FEEL?

Inspired. Supported. Challenged.
Connected.

BENEFITS

This retreat will benefit both you and your organisation by:

- enabling you to develop a clear vision for aligning your values and your work
- strengthening your ability to harness your full energy and creativity
- enhancing listening, communication and relationship-building skills
- building a community of like-minded professionals you just won't find anywhere else.



WHAT PARTICIPANTS HAVE SAID ABOUT PREVIOUS AUTHENTIC INVESTOR RETREATS

“The retreat gave me an opportunity to further explore myself, my values, my struggles and my authenticity.”

Pleuni de Kind, PGGM, Netherlands. Listen to Pleuni talking about the retreat [here](#).

“I gained a greater awareness of the rich opportunity set out there; a sense of personal tranquillity; and a higher awareness of my future personal purpose.”

Andrew Parry, Hermes Investment Management, UK.

“I really appreciated spending quality time with industry colleagues in a beautiful natural setting. Even better, the friendships we made in just a few days have proven to be both professionally and personally rewarding in the many months since.”

Emily Chew, Manulife Asset Management, Hong Kong.

“The best things were the ability to go deep into the personal and then to come back to the practice of investment; and the opportunity to air ideas and get really valuable peer response.”

Nick Robins, UNEP Inquiry into the Design of a Sustainable Financial System.

“It provided an invaluable network.”

Nadine Viel-Lamare, AP1, Sweden.

“It gave us an excellent venue for looking at some of the big-picture questions we face in sustainable investment, as well as the nitty-gritty issues we deal with on a daily basis.”

Tom Kuh, formerly MCSI, US. Listen to more of Tom’s experience of the retreat [here](#).

NB Comments are personal and do not constitute organisational endorsements.

Names of organisations are provided for information only.



AUTHENTIC INVESTOR

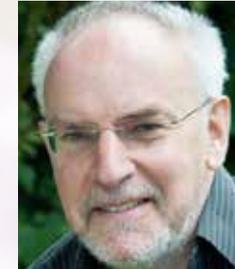
Authentic Investor's purpose is to align finance with sustainability and the needs of society. We do this by supporting personal and professional development for the people who work in finance, focusing on reconnecting value and values. Authentic Investor Ltd. is a not-for-profit initiative. Find out more about Authentic Investor [here](#).



**Rob
Lake**

Rob founded Authentic Investor in 2017. Rob's work focuses on the interconnected areas of sustainability, investment and people.

He has worked as an independent consultant to investors in Australia, Canada, Iceland, the Netherlands, Norway, Sweden, Singapore, the UK and the US. His work with investors focuses on beliefs, values, mindsets and strategy. He was previously with the Principles for Responsible Investment, APG Asset Management and Henderson Global Investors. Rob also works as a personal coach. He spent over ten years working for sustainability NGOs, after starting his career as a translator. He still thinks of what he does as an exercise in translation.



**Robin
Alfred**

Robin is Chief Executive of Findhorn Consultancy Service which he founded in 1999. A former Chair of Findhorn Foundation Trustees, his passion is facilitating extraordinary events as well as developing depth and authenticity in leadership.

Prior to Findhorn, Robin coached groups and individuals in the corporate, public and voluntary sectors. He also works as a Lead Presenter and Associate of Olivier Mythodrama with some of the world's largest corporations and Business Schools.

WHY FINDHORN FOUNDATION?

The Findhorn Foundation and Community has been a thought leader, a living experiment and an innovator in personal and professional development for over half a century. The Foundation has UN Habitat Best Practice designation and continues to pioneer new approaches to foster profound personal transformation and ways of integrated living that help co-create a positive future for humanity and the planet. Located 30 miles east of Inverness on the peninsula between Findhorn Bay and the Moray Firth, the Findhorn Community is blessed with stunning land and seascapes. This retreat seeks to make optimum use of this beautiful local environment as well as the community's considerable 'social software' that has helped to establish its global reputation.

LOGISTICS

Dates: 2.30 pm, Saturday, 11 August 2018 to 6.00 pm dinner, Tuesday, 14 August 2018

Cost: £1,750 - For-profit organisations (e.g. asset managers, banks)
£1,350 - Not-for-profit financial institutions (e.g. pension funds)
£950 - Individuals.

We are able to offer two places at £500 for NGO staff members on a first come first served basis. Please contact fics@findhorn.org to enquire about this option.

Included: three nights' accommodation (Saturday - depart Tuesday), all meals (vegetarian, local, organic where possible) and course content.

Optional: bed and breakfast extra night Tuesday 14 August £40.

Travel: There is a sleeper train from London via Inverness to Forres, and regular flights to Inverness. Findhorn is a strikingly beautiful place and accommodation is in single rooms in charming community facilities. Some bathrooms and toilets are shared, but this co-location does give you the opportunity to have breakfasts 'at home' with some other participants.

Please book early to ensure that you secure your place. We intend to confirm participants by 30 June. To register your interest in attending (by the end of April) and for any further information, email Yvonne Cuneo - fics@findhorn.org

Rob Lake & Robin Alfred

We look forward to engaging with you at Findhorn.



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