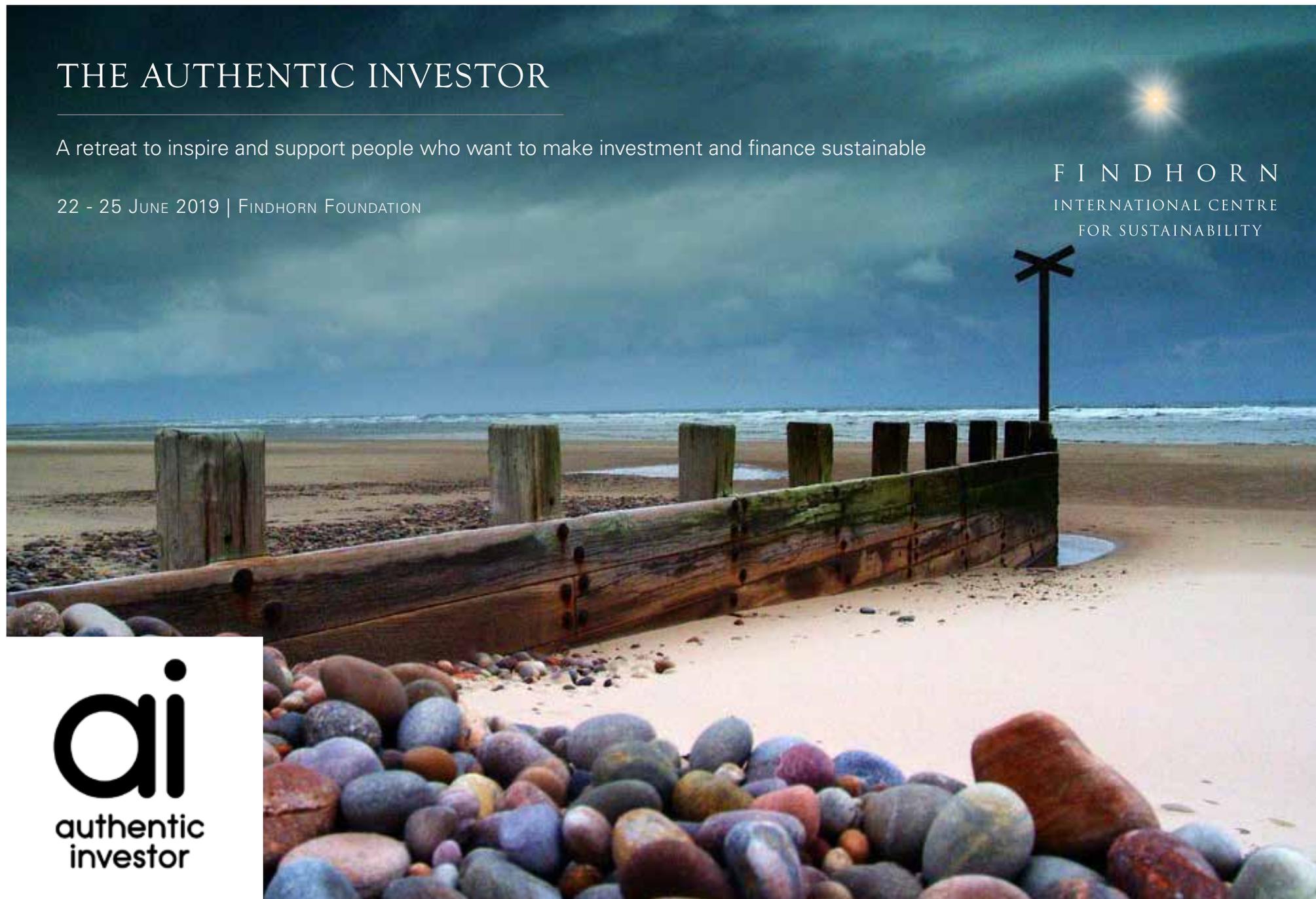


# THE AUTHENTIC INVESTOR

A retreat to inspire and support people who want to make investment and finance sustainable

22 - 25 JUNE 2019 | FINDHORN FOUNDATION

FINDHORN  
INTERNATIONAL CENTRE  
FOR SUSTAINABILITY



## WHY?

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Finance is waking up to the urgency of sustainability challenges, and of the need to serve society better. Working to encourage and accelerate this trend takes energy and creativity. But long-established cultures, norms and behaviours are slow to change. Meaningful change on the scale we need requires more than 'materiality', 'risk' and the 'business case'. It takes heart, not just head. It takes vision, values and passion. 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.

“Every journey, honestly undertaken, stands a chance of taking us toward the place where our deep gladness meets the world's deep need.

- PARKER J. PALMER

## 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 Australia, Canada, Denmark, Finland, Germany, Hong Kong, Italy, the Netherlands, Sweden, Switzerland, Turkey, the UK and the US. The maximum size of the group will be 25 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

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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

"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 time since."

*Emily Chew*, MANULIFE ASSET MANAGEMENT, HONG KONG/US

"The retreat gave me permission to explore who I am and what is important to me in life and work, and was a wonderful grounding opportunity. This is a powerful development opportunity for people in investment."

*Ingrid Holmes*, HERMES INVESTMENT MANAGEMENT, UK

"The range of ideas, the honesty of discussions, the breadth of perspectives and openness with which people shared their thoughts, feelings and inspirations were very beneficial."

*Ben Constable-Maxwell*, M&G INVESTMENTS, UK

"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 clarity about my values and how to apply sustainable investing within my organisation."

*Thomas Trsan*, VONTOBEL WEALTH MANAGEMENT, SWITZERLAND

Comments are personal and do not constitute organisational endorsements.

Names of organisations are provided for information only.



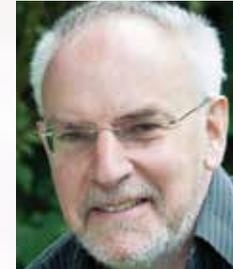
## AUTHENTIC INVESTOR

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.



*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, focusing 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?

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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

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Dates: 3 pm, Saturday, 22 June 2019 to 6 pm, Tuesday, 25 June 2019

£1,950 - financial institutions

£850 - 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](mailto:fics@findhorn.org) to enquire about this option.

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

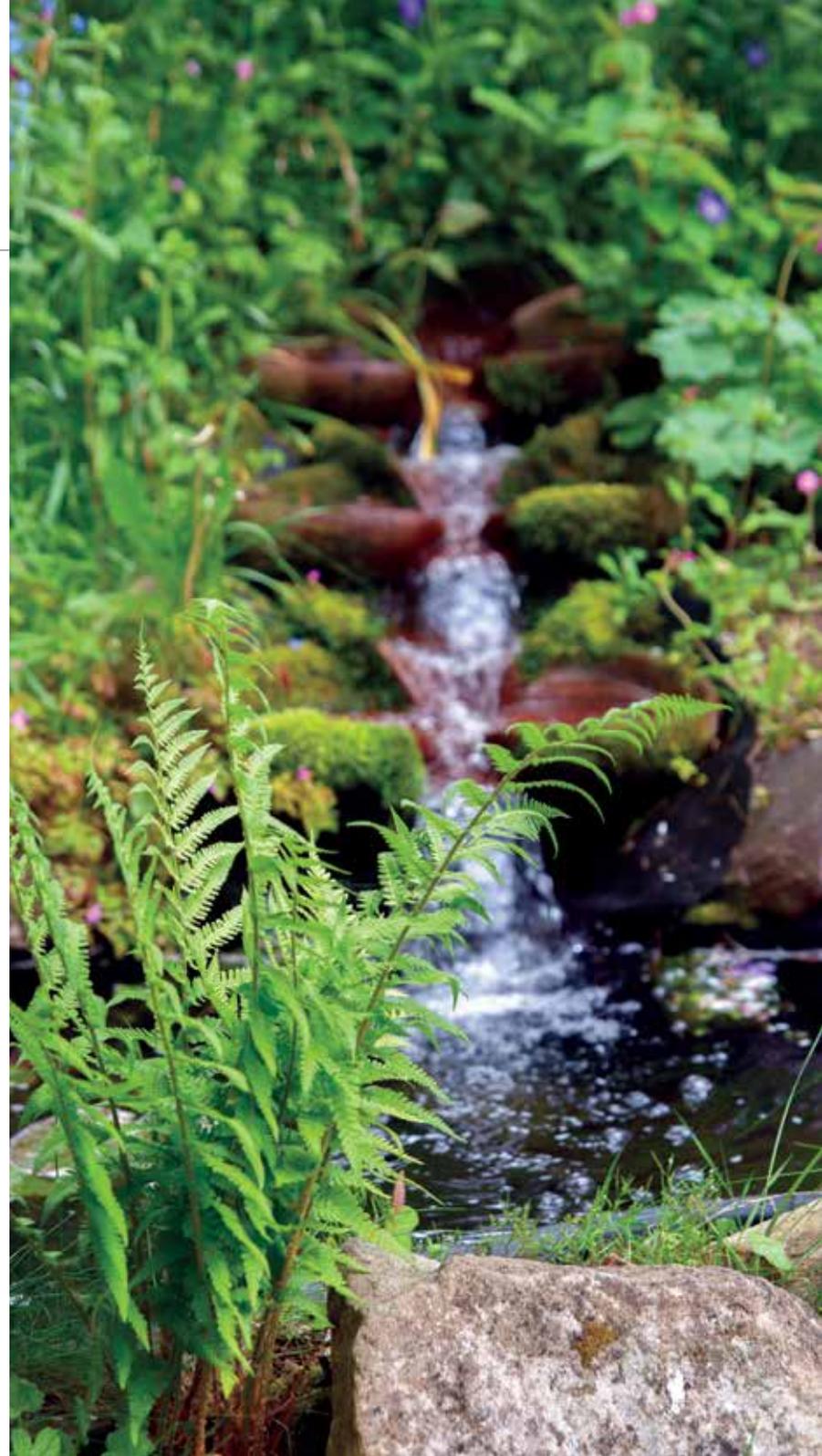
Optional: bed and breakfast extra night Tuesday 25 June £45.

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.

To register: and for any further information, email [fics@findhorn.org](mailto:fics@findhorn.org)  
Please book early to ensure that you secure your place. We intend to confirm participants by 30 April 2019.

Rob Lake & Robin Alfred

[fics.findhorn.org](http://fics.findhorn.org)





FINDHORN

INTERNATIONAL CENTRE  
FOR SUSTAINABILITY

We look forward to engaging  
with you in shaping a  
truly sustainable world.

**ai**  
authentic  
investor