



CAPITAL LINK'S "CSR&IR FORUM" ATTRACTS 375+ DELEGATES "Corporate Social Responsibility & Investor Relations-Maximizing Shareholder Value"

NEW YORK, NY, March 18, 2013—Capital Link's Annual "CSR & IR-Maximizing Shareholder Value" Forum took place on Wednesday, March 13, 2013 at the Metropolitan Club in New York. The event was organized in cooperation with NYSE Euronext. It attracted 375+ influential C-level Corporate, financial and investment executives, service providers and media who got together for a half day to discuss, debate and exchange information on critical industry topics and to network.

FORUM OVERVIEW :

<http://forums.capitallink.com/csr/2013newyork/index.html?articleID=qFJdobPSg6HnKNY>

Companies and investors are increasingly looking at Corporate Social Responsibility (CSR) not only as a means of accomplishing corporate governance, but also as a measurable, concrete way to increase shareholder value and profits.

CSR is becoming a fundamental component of a company's business model meant to produce tangible and profitable results in response to stakeholder expectations.

Capital Link's Forum focused on three major topics. From the corporate perspective it explored how CSR impacts the valuation and cost of capital for private and publicly listed companies as investors and financiers may perceive them as safer and more sustainable financing and investment choices. From the investors' point of view, it explored how CSR integrates among the investment criteria, what Socially Responsible Investing (SRI) is all about and its comparative return performance. And the third topic explored the alignment of the CSR, IR and the overall corporate communications strategy, message and function. Also, the developments in the area of Integrated Reporting Standards and updates on Reporting Solutions, standards and guideline.

FORUM STRUCTURE & PRESENTERS

The half day Forum was structured into lively panel discussions of industry experts from Fortune 500 listed companies, banks, investment companies, audit companies, consulting firms, Foundations and Reporting Organizations who came together to provide valuable insight and analyses on topics of critical importance to CSR&IR.

Nicolas Bornozis, President of Capital Link mentioned that a consistent corporate CSR track record can be a differentiating factor and a competitive advantage from an operational, commercial and financial point of view, impacting a company's valuation and cost of capital, along with its overall profitability and long term viability. He noted the increased demand from the investment community for CSR information, thereby necessitating closer cooperation between the IR, CSR and Corporate Communications departments. Capital Link aims to host this Forum on an annual basis to discuss and debate trends and developments in this field while providing during the year a flow of thought leadership initiatives through webinars.

PANEL DISCUSSION:

“VALUING COMPANIES BEYOND FINANCIAL METRICS - CSR, Finance & Capital Markets”

Moderator:

Eric J. Hespenheide, Global Leader, Deloitte Sustainability Audit & Enterprise Risk Services - **Deloitte & Touche**

Panelists:

Marc Fox, Director, Investor Initiatives - **The Carbon Disclosure Project**

Bruce Kahn, Sustainability Management Program - **Columbia University**

Erika Karp, Managing Director, Head of Global Sector Research - **UBS Investment Bank**. She stated that “a greater consciousness by corporate leaders of the environmental, social, and governance factors which impact their economic outcomes will prove to benefit ALL stakeholders. Given the fundamental challenges facing society, ranging from climate change to women's economic empowerment, education and healthcare, great companies can both manage risk, and seize growth opportunities, by a systematic and transparent effort towards Sustainability”.

PANEL DISCUSSION:

“CSR & SHAREHOLDER VALUE: OPTIMIZING VALUATION & RETURNS”

Moderator:

Joe Sibilia, Chief Executive Office - **CSRwire**

Panelists:

Adam Kanzer, Managing Director & General Counsel - **Domini Social Investments**; VP & Chief Legal Officer - **The Domini Funds**

Michael Jacobson, Director, Corporate Responsibility Office - **Intel Corporation**

Al Iannuzzi, Sr. Director, Product Stewardship, WW Environment, Health & Safety - **Johnson & Johnson**

Paula Luff, VP Corporate Social Responsibility - **Hess Corporation** (NYSE:HES)

Kevin Anton, Chief Sustainability Officer – **Alcoa, Inc.** (NYSE:AA) – He stated that “Throughout Alcoa’s 125-year history, sustainability has been central to our activities, embedded in our strategies, product offerings and operations. We take a long-term approach by balancing the interests of our stakeholders – shareholders, customers, employees communities – to offer sustainable products and ensure our continued success.”

PANEL DISCUSSION:

”CSR, ALIGNING STRATEGY & COMMUNICATIONS”

Moderator:

Michelle Greene, SVP & Head of Corporate Responsibility - **NYSE Euronext** (NYSE:NYX)

Panelists:

Dave Stangis, VP Public Affairs & Corporate Responsibility - **Campbell Soup Company** (NYSE:CPB)

Beth Shiroishi, VP, Sustainability & Philanthropy - **AT&T**

Maggie Kohn, Director, Global Corporate Responsibility – **Merck & Co., Inc.**

Jacqueline Strayer, VP, Corporate Communication - **Johnson Controls, Inc.**

PANEL DISCUSSION:

“INTEGRATED REPORTING AND UPDATES ON REPORTING SOLUTIONS, RATIO STANDARD & GUIDELINES”

The panel shared their expertise and perspectives on the present and future of corporate responsibility and sustainability disclosure and reporting. The expansion of third party ratings, rankings, scorecards, best-of-list of companies was discussed and panelists helped the audience to better understand the various standards, frameworks, analyst models, and other approaches fit in the broadening mix of information related to corporate ESG performance.

Moderator:

Hank Boerner, Chairman - **Governance & Accountability Institute, Inc. (G&A)**

Panelists:

Stathis Gould, Head of Professional Accountants in Business - **IFAC**

Janice Warren, President - **OneReport**

Marjella Alma, Manager External Relations - **Global Reporting Initiative USA (GRI)** – She stated that “The process of sustainability reporting should help enable companies to identify issues that have a material impact and justifying public disclosure. Sustainability was never intended to be an “add-on” exercise, but should be used to smarten up your business, be holistically integrated with your corporate strategy from a 21st century perspective,, and focus on long-term viability by looking through a broader “sustainability” lens”.

Mark Tulay, Program Manager - **GISR** – He stated that “Do these financial and other mandated reports tell the whole story of the corporation? Are there missing elements that pose risk .or present an opportunity that we are not seeing in the numbers alone? The answer is yes and so we are now seeing a welcome and expanding flow of non-mandated information related to corporate sustainability and ESG performance. This expanded disclosure in the form of corporate sustainability, responsibility, citizenship disclosure. and reports comes from large-cap, as well as mid- and small-cap enterprises. We find that 53% of the S&P 500 Index companies and 57% of the Fortune 500 companies issued reports in 2011 and to mid-year 2012. That's up from a base of about 20% reporting for each the previous year”.

PANELDISCUSSION:

“CSR & INVESTING-THE INVESTOR’S POINT OF VIEW-WHAT MATTERS?”

Moderator:

Dan Hanson, Managing Director & Portfolio Manager - **BlackRock**

Panelists:

Jan C. Childress, Director, Investor Relations - **Consolidated Edison, Inc.**

Gary Buesser, Director - **Lazard Asset Management, LLC**

Elizabeth Seeger, Principal - **Kohlberg Kravis Roberts (NYSE:KKR)**

Joseph M. Kinard, Investment Committee Member, Board of Pensions - **Presbyterian Church USA Pension Fund** He mentioned that“ SRI equals SRI. Socially Responsible Investing equals Solid Returns on Investment.”

PANEL DISCUSSION:

“SUSTAINABLE INVESTING & CREATED SHARED VALUE”

Moderator:

Bennett Freeman, SVP, Sustainability Research and Policy - **Calvert Investments**

Panelists:

Mark D. Sloss, Executive Director, Sr. Portfolio Manager - **UBS Wealth Management Americas**

Paul Hilton, Portfolio Manager & Director of Business Development - **Trillium Asset Management, LLC**. He mentioned that “It is very important that investors realize they can combine performance and impact in selecting an investment manager. This is driving the growing demand for sustainable and responsible investments among retail and institutional investors alike and sending a powerful message to corporations that it pays to be a responsible company.”

Orin Kramer, General Partner - **Boston Provident L.P.**, Chairman of the Board of Directors - **Robert F. Kennedy Center for Justice & Human Rights**. He mentioned that “The fundamental premise of sustainable investing is that there isn’t a trade-off between investment returns and sustainability considerations. Sustainability isn’t about imposing policy values on fiduciaries; it’s about incorporating factors which do, in fact, affect investment outcomes into risk management”.

PANELDISCUSSION:

“PUBLIC PRIVATE PARTNERSHIPS/GLOBAL CSR”

This panel examined public private partnerships across the spectrum from those focused on philanthropic objectives to those aiming to create shared value for both the company and the society. They discussed how these types of partnerships differ, how they are measured and key trends for various industries.

Moderator:

Laura Herman, Managing Director - **FSG**

Panelists:

Judith Moore, Consultant, Environment & Corporate Responsibility, Treasury & former Head of CSR - **World Bank**

Mauricio Barbeiro, Sustainable Business Manager - **Banco Santander Brasil**

Bulbul Gupta, Head of Market-Based Approaches - **Clinton Global Initiative**. She mentioned that “Trends in Public Private Partnership equals with Corporate Strategic Philanthropy as Market Differentiation, which means mobilizing core business competencies while meeting beneficiaries’ It is necessary to know what a corporation stands for re core business, as well as social impact.

It is important to identify the right social issue to address as a corporation, that is based on community needs (and that takes advantage of core business and staff expertise, provides business unit engagement as well as traditional CSR and volunteering opportunities).

Finally, it is important to then identify the right partners to commit with long-term. Corporate philanthropy can be a series of first or second dates, but strategic philanthropy can and should be a deeper engagement, especially to see impact at the base of the pyramid populations and least-developed markets. Core Business in combination with strategic philanthropy means Shared Value, which is one of the most powerful approaches that has helped take that internal analysis of external societal problems into an ideal tool for designing the next generation of PPPs.

Taken the conference theme, Maximizing Shareholder Value is truly possible if we work to better align core business and CSR to achieve business as well as social value”.

Sharon D’Agostino, VP, Corporate Citizenship - **Johnson & Johnson**

She told us that "Partnerships are critical in delivering our commitment to improve health and well-being around the world. Johnson & Johnson was the first private sector partner to join the United Nations Health4+, a partnership that trains skilled birth attendants in Emergency Obstetric and Newborn Care in Ethiopia and Tanzania, two countries where maternal and infant mortality rates are high."

SPONSORS & MEDIA PARTNERS

Event Organized in Cooperation with: NYSE Euronext

Sponsor: Deloitte & Touche LLP

Supporting Sponsor: OneReport

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Media Partners: CSRwire, Barclay Hedge

WEBINAR SERIES

Capital Link will hold a series of CSR related webinars providing updates until the **2014 CSR & IR Forum**.

The Dec. 4, 2012 “CSR & Shareholder Value” Webinar is still accessible at the link below.

<http://webinars.capitallink.com/2012/csr/index.html>

ORGANIZER – CAPITAL LINK, INC.

With its headquarters in New York and presence in London and Athens, Capital Link has been active since 1995 in the field of Investor Relations and Financial Communication. Its activities focus mainly on three areas: 1) Linking companies with strategic and institutional investors, bankers, analysts, and the financial media in Europe and the United States, 2) American Closed-End Funds and ETFs, 3) Listed shipping Companies. Capital Link has a leading position globally in the area of Investor Relations with respect to shipping, and to US Closed-End funds and ETFs.

Capitalizing on our 17-year track record with the organization of uniquely successful investment conferences, Capital Link has pioneered a series of CSR-focused forums in London, Athens, and New York. We complement our forums with webinars that we regularly organize for each topic. Our London CSR Forum focuses on the Maritime and Offshore Industries, while our Athens Forum on the significance of CSR in a country that is tested by severe economic decline and social discomfort. The CSR Forum in the US focuses in the viability of CSR not only as means of accomplishing corporate governance, but also as a measurable, concrete way to increase shareholder value and profits.

As an Advisory and Investor Relations firm Capital Link is at the forefront of the major issues of interest and concern among financiers, analysts, investors and companies, enabling us to put together a powerful agenda with the right topics and panelists. We complement our industry expertise with highly targeted databases of contacts from the corporate, financial and investment communities, as well as from the CSR & the financial media. The Capital Link Forums combine an educational, informational and marketing platform with unique visibility and networking opportunities. Capital Link is a GRI Stakeholder.

AUDIO RECORDING & TRANSCRIPT

The full audio recording and transcription for this event is available upon request at the cost of: \$175. If you are interested, please send your requests to csr@capitallink.com - **Dana Carey** - Director of Business Development - Capital Link, Inc.- 230 Park Avenue, Suite 1536 - New York, NY 10169 - Tel. (212) 661-7566 ext. 234

Complete 5 Hour Transcription & Audio Package Available- Hear the latest updates from the Experts!

- **Michelle Greene**, VP & Head of Corporate Responsibility - **NYSE Euronext**
- **Orin Kramer**, CEO - Boston Provident Hedge Fund/Chairman - **Robert F. Kennedy Center Board of Directors**
- **Kevin Anton**, CSO - **Alcoa**
- **Curtis Ravenel**, Global Head, Sustainability Group - **Bloomberg**
- **Dan Hanson**, Managing Director - **Blackrock**
- **Erika Karp**, Managing Director, Head of Global Sector Research - **UBS Securities LLC**
- **Adam Kanzer**, Managing Director and General Counsel - **Domini Social Investments** and Vice President and Chief Legal Officer - **the Domini Funds**
- **Bennett Freeman**, SVP, Sustainability Research and Policy - **Calvert Investments**
- **Bulbul Gupta**, Senior Manager, Market-Based Approaches, **Clinton Global Initiative**
- **Mauricio Longhini Barbeiro**, Sustainable Business Manager - **Banco Santander(Brazil)S/A**
- **Judith Moore**, Consultant, Environment and Corporate Responsibility, Treasury, **World Bank (and former Head of CSR for the World Bank)**

- **Elizabeth Seeger, Principal - Kohlberg Kravis Roberts (KKR)**
- **Eric J. Hespeneide, Partner, Deloitte & Touche LLP**
- **Paul Hilton, Portfolio Manager & Director of Business Development, Trillium Asset Management**

FOR FURTHER INFORMATION

To become part of our database and to be invited to future events or for any other request please contact:

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ANNUAL NEW YORK CSR FORUM :

<http://forums.capitallink.com/csr/2013newyork/index.html?articleID=qFJdobPSg6HnKNY>