

## Green Spectrum of Capital Exploring Sustainable Wealth Stewardship

### SPEAKERS' BIOS

#### Jonathan Moon – CHAIR

Jonathan is an investment director at Greenbank, specialising in managing tailored investment portfolios with a focus on sustainability, impact and ESG considerations. He started his career as an investment adviser at Tilney Investment Management and has since held roles at Close Brothers Asset Management and Sanlam Private Office, working with both private clients and professional intermediaries. Jonathan holds the Investment Management Certificate, the Private Client Investment Advice and Management Diploma and the CISI Masters in Wealth Management. He is also a CFA Charterholder and holds the CFA Certificate in ESG Investing as well as the STEP Certificate for Financial Services. A Chartered Fellow of the Institute for Securities and Investments, Jonathan has a B.A. in Management Studies with Spanish from the University of Nottingham. He joined Rathbones in March 2022 and provides values-based investment solutions for private clients, trusts and charities, with an emphasis on ethical and socially responsible portfolios.

#### Kai Johns

Kai conducts analysis of investments against a range of environmental, social and governance criteria for both new ideas and companies in Greenbank's investment universe. Kai's focus is on climate impact and risk assessment across the investment portfolios Greenbank manages and his areas of interest include climate solutions, net zero and smart cities. Kai joined the ethical, sustainable and impact research team in March 2019 after graduating from the University of Cambridge with a BA in Law and he is a CFA Charterholder.

#### James Broderick

Jamie Broderick is a Director of the Impact Investing Institute, an independent, non-profit UK organisation that aims to accelerate the growth and improve the effectiveness of the impact investing market. The Institute is supported by the Government Inclusive Economy Unit, the Department for International Development, the City of London Corporation, and a number of financial services organisations in the UK.

Jamie was head of UBS Wealth Management in the UK from 2013 to 2017. Jamie joined UBS after nineteen years at J.P. Morgan Asset Management, latterly as Chief Executive of its European operations. He joined J.P. Morgan in New York in 1993 and moved to London in 1996. He started his financial services career at Wellington Management Company, an independent asset management partnership in Boston. He studied Arabic Linguistics and Near Eastern Languages and Civilizations at Harvard College and continued those studies in a Ph.D. program at the University of Chicago.

#### Joanne Etherton

Joanne Etherton is an experienced City lawyer and as ClientEarth's Head of Purposeful Markets leads a team of more than 30 lawyers. The Purposeful Markets team develops and implements legal strategies based on corporate, consumer and financial laws designed to contribute to the rapid emergence of new models of corporate governance and investment that operate within planetary boundaries. The team also ensures corporates and those who finance them are held accountable for their negative impact on the environment and stop corporate greenwashing activities.

# NETWORKING EVENT



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The team also advocates for new financial laws and their proper enforcement and works with those taking a lead in responsible transition. Prior to joining ClientEarth in 2017, Joanne had practised law in the London offices of two international law firms for more than 25 years, including many years as a pensions partner.