



PRE

**THE
DISTRIBUTION
INITIATIVE**

8th International r3.0 Conference

**Plenary Science & Behavior – Thresholds
of Transformation for Sustainability
Measurement & Reporting**

7 September, 2021

**Co-creating a Taskforce on
Inequality-related Financial
Disclosures (TIFD)**

Layers of Influence in the “Capital Markets Value Chain”

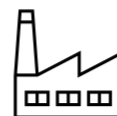
Incentives, portfolio construction, and financial analysis practices at the asset owner and allocator level cascade down to the rest of the economy



Investment professionals at the **asset owner and allocator level** (as well as **banks and lenders in the case of debt**) set expectations and incentives for asset managers and companies



Investment professionals at the **asset manager level** set expectations for companies based on demands from asset owners



Companies incentivize their own teams often in response to demands from investors



Examples of ESG Issues in Investment Practices and Structures

**Fund Manager
Compensation**

**Financial
Engineering**

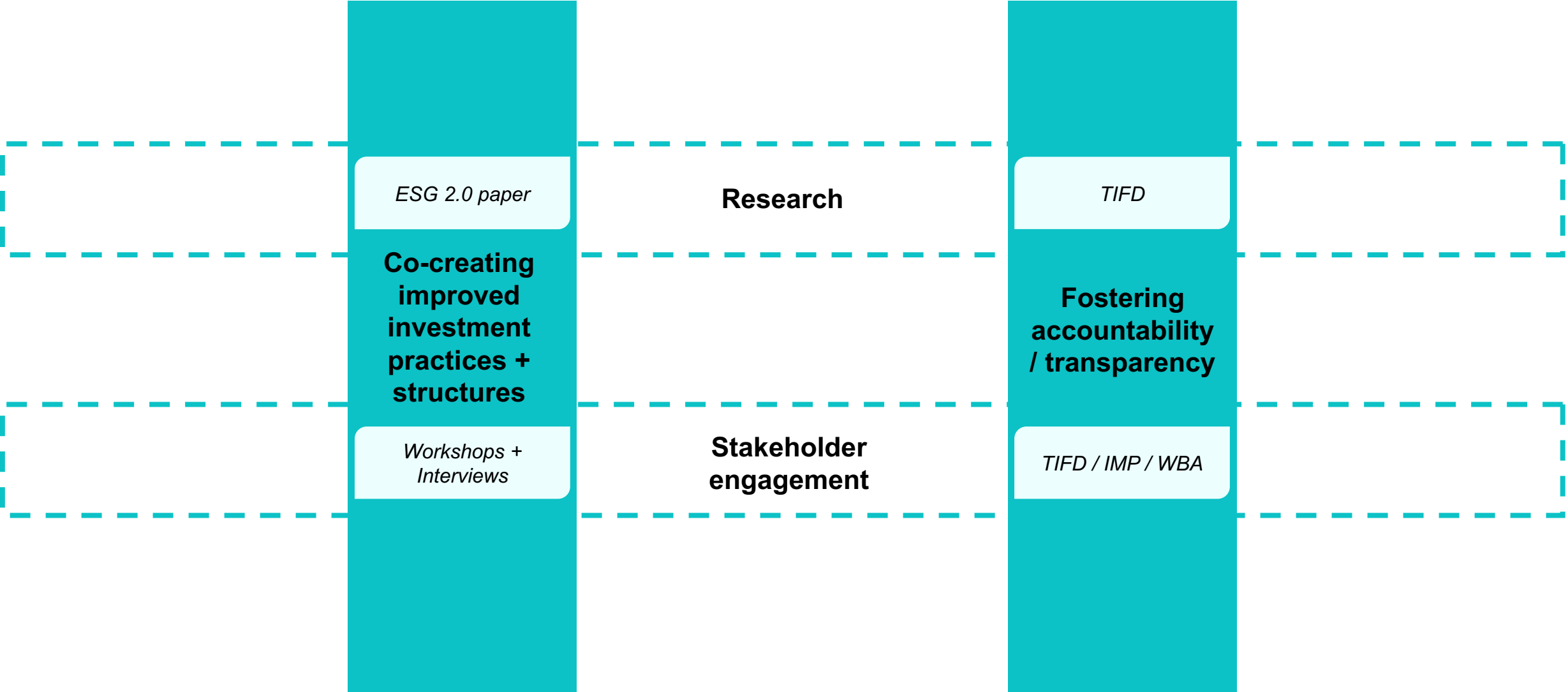
**Tax & Policy
Issues**

**Team
Incentives &
Performance
Evaluations**

**Valuation
Methodologies
& Financial
Analysis**

Issues at *both* asset manager + asset owner and allocator levels

PDI: Key Pillars of Work



TIFD: Inspired by TCFD, but Different

Rights-based → centering rights holders, particularly the marginalized + vulnerable, in a co-creation process

Company AND investor level reporting

“Inside-out” + “outside-in” risks

Context-based: targets and thresholds informed by planetary boundaries + human rights

TIFD: History to Present

May 2020

Categories: [Hot Topics > Data & Disclosure](#) | [Hot Topics > Thought Leadership](#) | [Social > Diversity & Equality](#)

FREE It is time for a Taskforce on Inequality-related Financial Disclosures

The current crisis reminds us that inequality is a systemic financial risk just like climate change



print save in my articles SHARE: [email icon] [facebook icon] [twitter icon] [google plus icon] [linkedin icon] [pinterest icon] [telegram icon]

by: Dellan Rothenberg, Paul Risman, and Joanne Bauer | May 20th, 2020

Mid 2020 – Mid 2021

Stakeholder Engagement

Iterative FAQ

Present

Interim Secretariat:



Seed Funding:

GRANT RECIPIENT TIPPING POINT FUND ON IMPACT INVESTING

TIFD: High-level Timeline of Next Steps

The TIFD Project + Interim Secretariat Launches

TIFD Framework is developed

Official TIFD Framework Launch



Iterative stakeholder mapping, engagement, coalition building, and research

Fine-tuning of FAQ

Develop Conceptual Framework and governance structure, as well as build further resources

Working Groups commence mapping of disclosures, gap identification, and recommendations for synthesis and closure of gaps

Draft TIFD Framework is released, along with guidance

Investors and companies pilot the TIFD Framework

Join us!

To learn more about TIFD and get involved,
visit www.thetifd.org

Thank you!

