



Simon Fraser Stewardship Award – winners

(London, 23 January 2024)

The Investor Forum is pleased to announce joint winners of the Simon Fraser Stewardship Award for 2023 are Kimberley Lewis, Head of Active Ownership at Schroders and Helene Winch, Head of Responsible Investing at Premier Miton Investors.

The Award, presented at the Investor Forum's 8th Annual Review event on 23rd January, is named in honour of the founding Chair of the Investor Forum in recognition of his commitment to stewardship, his generosity of spirit and his ability to both recognise and bring out the best in the people around him.

Andy Griffiths, Executive Director of the Investor Forum, said:

"We would like to congratulate Kimberley and Helene for jointly winning the Award. We are delighted to recognise both for their impactful contributions to stewardship in their own institutions and also to the wider investment industry.

We are also pleased to highly commend David Patt as a growing force within the corporate governance world."

The winners

As Head of Active Ownership at Schroders, **Kimberley Lewis** is responsible for driving forward Schroders' stewardship strategy, encompassing engagement and proxy voting. Under Kimberley's leadership, the team has launched an Engagement Blueprint, setting out for companies, clients and other key stakeholders Schroders' Active Ownership priorities. The Investor Forum has welcomed Kimberley's continued commitment to making the case for effective stewardship, engagement and escalation, her valuable input as a member of the advisory group on the Best Practice dialogues project and as an expert speaker on our IFDP programme.

Helene Winch brings her wide experience of responsible investing to Premier Miton, where senior management value the impact she has made not just in the investment process but also in the wider business. She formed, and participates in, the Responsible Investing Oversight Committee, which provides oversight of the stewardship and responsible investing process to comply with the firm's responsibilities to various stakeholders. Over the year Helene has been responsible for developing the firm's net zero strategy and engaging with portfolio companies assessed as posing the highest climate risk. Helene is an active contributor to many Investor Forum projects, events and company engagements, and we value her insights.

Highly commended

The judging panel also 'highly commended' **David Patt**, Responsible Investment VP at Columbia Threadneedle. In 2023, David was active in proposing UK companies for collective engagements, and made significant contributions to a number of Investor Forum Working Groups, including on Best Practice Dialogues and Proxy Voting provider feedback. His colleagues recognised the patience, tenacity and subject matter expertise that he demonstrates in his new role, and the Investor Forum team value the energy and insights he brings to all our conversations.



The Award

Nominations from Member firms were judged against the following criteria:

- Putting stewardship at the heart of investment decision making.
- Demonstrating sound judgement and the ability to deal with challenging situations effectively and with integrity.
- Taking an initiative, individually or collectively, which demonstrates either personal development or helps others to develop stewardship skills.
- Focusing on practical outcomes which have had an observable impact.

Contacts:

- **Investor Forum**

Andy Griffiths

andy.griffiths@investorforum.org.uk

Tel: 020 7611 2223

- **Lansons**

Tom Baldock

tombaldock@lansons.com

Tel: 07860 101715

Tom Straker

toms@lansons.com

Tel: 07505 425961

Notes to editors:

- Simon Fraser, 1959 – 2021, was instrumental in the establishment of the Investor Forum, taking on the role of founding Chair on a pro bono basis in 2014. See more [here](#).
- The Investor Forum is an independent, not for profit organisation founded in October 2014. At the end of 2023, 55 investment firms are Members, including asset managers, insurance companies, pension funds, and endowments.
- Members have ~£18trn in Global assets under management, and £580bn invested in UK equities, which represents ~27% of the FTSE All-Share market cap.
- The purpose of the Investor Forum is to position stewardship at the heart of investment decision making by facilitating dialogue, creating long-term solutions and enhancing value.