



Oakledge Advisors + FFI Solutions Strategic Partnership Webinar



January 14, 2026

Webinar agenda

- + What we're seeing in the market
- + Overviews:
 - Oakledge Advisors
 - FFI Solutions
 - Why we partnered
- + What we do for institutional clients
 - Asset owners & consultants
 - Asset managers & GPs
 - Ecosystem partners (NGOs, MDBs & DFIs, service providers)
- + How we work: engagement models
- + Third party collaborations
- + Closing remarks
- + Q&A

What we're seeing in the market

- + ESG "backlash" - signal : noise ratio is skewed
- + Allocators are sensitive to language: risk/return > perceived altruism
- + Proliferation of climate/impact data solutions = innovative insights but hard to manage & parse
- + **Opportunities remain abundant**

About Oakledge

Founded by Max Messervy (ex-Mercer, Ceres, public & NGO sector leader)

Mission-driven and unconflicted (no OCIO, no product sales, no manager placement)

Client partnership ethos: high-trust, strategic, collaborative, open solution architecture

Embedded deeply in allocator, manager, and ecosystem networks

About FFI Solutions

Connecting the Dots on Climate



**Fossil Fuel
Analytics**



**Energy
Transition
Research**



**Physical
Climate Risk
Model Design**



**Climate Action
Planning**

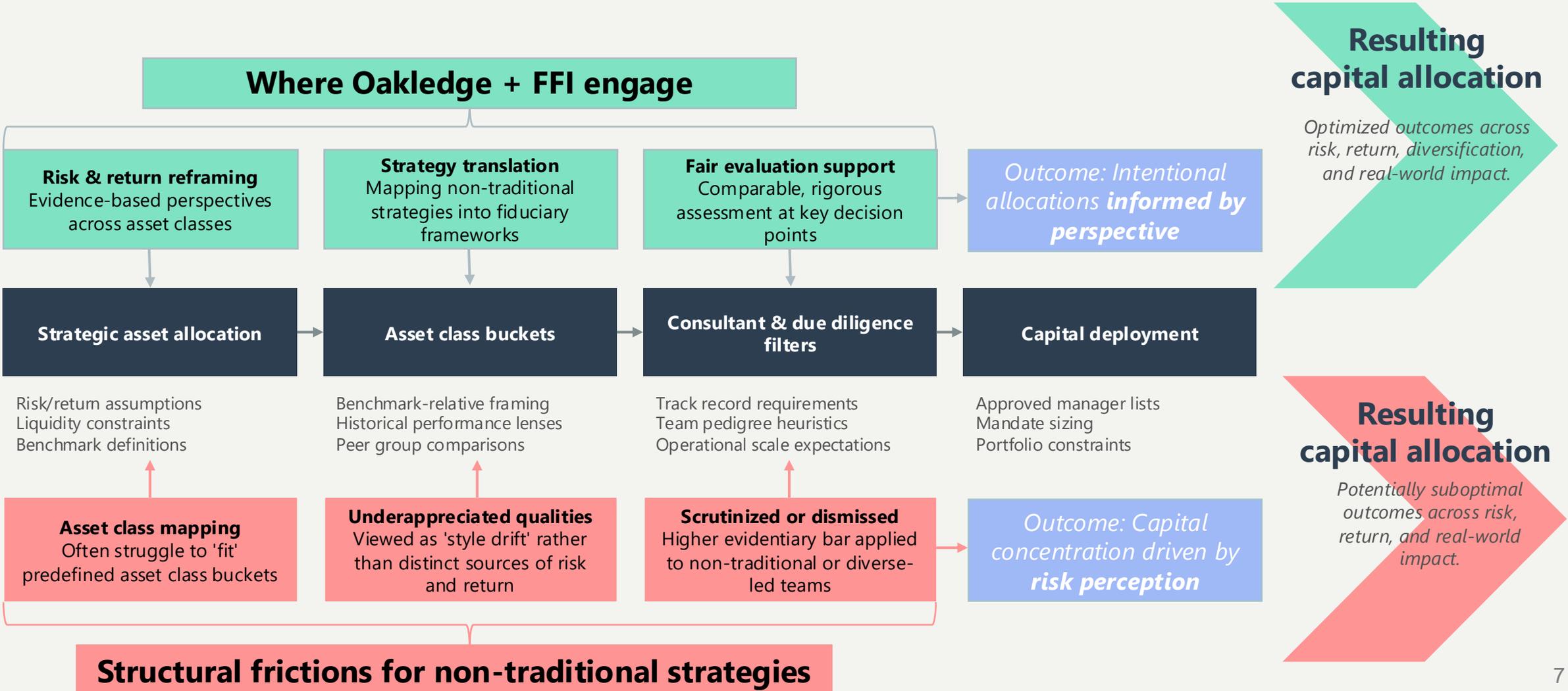


Why we partnered

- + Longstanding professional relationship and shared market perspective
- + Common philosophy:
 - Fiduciary duty
 - Performance orientation
 - Pragmatism over ideology
- + Complementary strengths:
 - Oakledge: strategy, governance, fiduciary translation, senior-level advisory
 - FFI: climate analytics, research depth, expert execution partners
- + Together:
 - Delivering decision-grade sustainability and climate advisory that neither firm could deliver alone

Why capital struggles to reach non-traditional strategies

Structural friction points in institutional allocation frameworks: often unintentional, but **highly consequential**





What we do for institutional clients

Asset owner & consultant-focused offerings

- + **Strategic Sustainability & Climate Advisory**
- + **Decision-Useful ESG & Climate Integration**
David Root, Head of Product Management, FFI
- + **Physical & Transition Risk Analysis**
Lynn Connolly, Senior Expert, FFI
- + **Climate Solutions & Impact Assessment**
Kent Costello, Founding Partner, Vested Futures

Asset manager & general partner-focused offerings

Decision-useful growth strategy

Richard Fontes, Expert Network, FFI

All of the above, plus:

- + Strategic advisory and fiduciary translation
- + Product concept refinement and ESG/impact framework design
- + Market positioning and investor narrative development
- + Research and market intelligence
- + Design thinking-led growth strategy

Ecosystem partner-focused offerings

Non-profits, grant-makers, public development banks, service providers

Accelerating your capital influence

- + Connecting impactful research and initiatives to institutional capital
- + Supporting capital mobilization through investor coalitions and convenings
- + Advancing research that is decision-relevant for allocators and managers



How we work

Engagement models

Engaging Oakledge + FFI Solutions

Project-based or retained advisory

- + Explicitly unconflicted:
 - No success fees
 - No broker-dealer activity
 - No product sales incentives

Outsourced Chief Sustainability Officer model

- + An integrated capability covering:
 - Strategy
 - Decision support
 - Implementation oversight
 - Reporting and communications alignment
- + Annual retainer structure, with flexibility for bespoke assignments



Third-Party Collaborations

Who else do we partner with, and why?

Connecting the Dots on Climate



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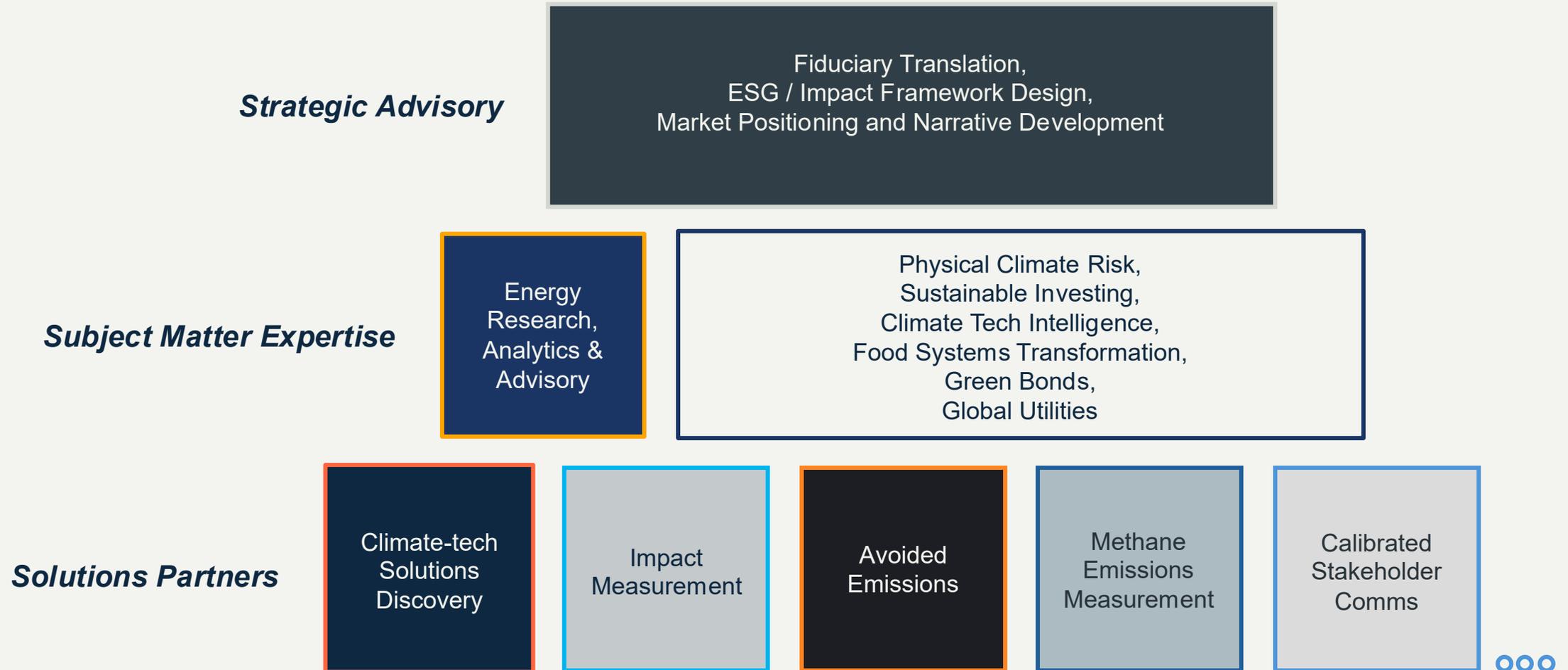
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Connecting the Dots on Sustainability



Connecting the Dots on *Sustainability*

Strategic Advisory



Subject Matter Expertise



FFI Expert Network

Solutions Partners



ACA Ethos

RHOIMPACT





Closing remarks



Q&A

Thank you!

- + Get in touch:
- + Oakledge Advisors:
info@oakledgeadvisors.com
- + FFI Solutions:
info@ffisolutions.com