

Impact/SRI & ESG Investing 2016 Conference



AGENDA | September 19, 2016

7:00 am - 8:00 am

Breakfast In Exhibit Hall

8:00 am - 8:10 am

Opening Remarks And Chairperson Welcome

9:05 am - 9:55 am

Impact/SRI & ESG Investing Session

The Disconnect Between Financial Advisors And Clients

IMCA and CFP Board CE Credit Approved

A majority of clients are asking for impact investments yet only a minority of FAs are servicing them. Why the gap?

Speakers:

Justin Conway, Calvert Foundation

Paul A. Hilton, Trillium Asset Management

10:35 am - 11:25 am

Impact/SRI & ESG Investing Session

*A Plethora Of ESG & Impact Investments
Now Exist For Retail Investors*

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Via which platforms, exchanges and broker-dealers can investors find them?

Speakers:

Mark A. Regier, Praxis Mutual Funds

Craig Churman, Saturna Capital

Patrick T. Drum, Saturna Capital

11:30 am - 12:20 pm

Impact/SRI & ESG Investing Session

Impact Investments Can Outperform Traditional Securities

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Which investments—private equity, debt, or alternatives—are outshining their common peers?

Speakers:

Abhilash Mudaliar, GIIN

David Sher, Greenbacker

2:10 pm - 3:00 pm

Impact/SRI & ESG Investing Session

*For Those Seeking Non-Correlated Assets,
Impact Investments Fit The Bill*

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How to construct portfolios while lowering risk using impact investments.

Speakers:

Andrew Shafter, Community Capital Management

Abdur Nimeri, Ph.D., FlexShares

3:05pm - 3:55 pm

Impact/SRI & ESG Investing Session

Impact & Effect!

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How can active ownership promulgate gender equality and create impact across a broad range of social issues?

Moderator:

Perth Tolle, Life + Liberty Indexes

Speakers:

Gloria S. Nelund, TriLinc Global

Tracey Rembert, Christian Brothers Investment Services

Luan Jenifer, Miller/Howard Investments

4:40 pm - 5:30 pm

Impact/SRI & ESG Investing Session

*More Than \$300 Billion In Philanthropic Funding
Could Be Re-Directed To Impact Investments*

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A better understanding of charitable giving and goals could foster a sea change in the amount of impact investing's total assets under management.

Speakers:

Liz Sessler, ImpactUs

5:30 pm - 6:30 pm

Cocktail Reception