

**AGENDA: San Francisco**

9:00–9:30am	<b>Registration. Networking. Coffee and Tea.</b>
9:30–10:10am	<b>Welcome! Overview. Introductions.</b> Steve Schueth, President, First Affirmative Financial Network; Producer, The SRI Conference
10:10–10:20am	<i>Sponsor Update: Danielle Burns, Rebecca Jackson, First Affirmative Financial Network</i>
10:20–11:20am	<i>Introduction by Erin Gray, Green Century Funds</i> <b>Advocacy in Action: We Will Not Be Silenced!*</b> Danielle Fugere JD, President, As You Sow; Patricia Farrar-Rivas CIMA, CEO, Veris Wealth Partners; Leslie Samuelrich, President, Green Century Capital Management <i>*Submitted for CE for CFAs and CIMAs</i>
11:20–11:30am	<i>Sponsor Update: Andrew Olig, Calvert / Eaton Vance</i>
11:30–11:50am	<b>Break. Networking</b>
11:50am–12:00pm	<i>Sponsor Update: Bob Helmuth, Peter Schwab, Pax World Investments</i>
12:00–12:50pm	<b>Economic Update, PLUS Lessons from Iceland*</b> Mel Miller CFA, Chief Economist, First Affirmative Financial Network <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
12:50–1:35pm	<b>Buffet Lunch. Networking.</b>
1:35–1:45pm	<i>Sponsor Update: Robert Steger, Folio Institutional</i>
1:45–2:00pm	<b>Loving Your To-Do List: Time Management for Busy Professionals</b> Sonya Dreizler CFP, Solutions with Sonya
2:00–2:05pm	<i>Sponsor Update: Vidya Nathu, Parnassus Investments</i>
2:05–2:55pm	<b>Making the Grade: Higher Education and Sustainable Investing*</b> David Dinerman JD, Trustee, Hampshire College; Robert Nava JD, President San Francisco State Foundation; Seren Pendleton-Knoll, Program Director, Berkeley-Hass Center for Responsible Business and Sustainable Invest & Finance Initiative; Paul Herman, Founder and CEO HIP Investor, Inc. <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
2:55–3:00pm	<i>Sponsor Update: Emily Lee, Trillium Asset Management</i>
3:00–3:05pm	<i>Sponsor Update: Colin Rennich, Appleseed Capital</i>
3:05–3:25pm	<b>Break: Networking</b>
3:25–4:20pm	<i>Introduction by Craig Churman, Saturna Capital Management</i> <b>Sustainable Investing Solutions for Tomorrow's Client Appointments*</b> Paul Ellis JD, Consultant; Jeff Gitterman, Founder, Gitterman Wealth Management; Sarah Green CFP, Co-Founder and Principle Advisor, Transformative Wealth Management; Craig Churman, Vice President Saturna Capital Management <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
4:20–4:30pm	<b>Wrap Up. Feedback. Evaluations.</b>
4:30–6:00pm	<b>Cocktail Reception</b>

