

AGENDA: Boston

9:00–9:30am	Registration. Networking. Coffee and Tea.
9:30–10:00am	Welcome. Overview. Introductions. Steve Schueth, Producer, The SRI Conference and Regional Investing for Impact Events Alex Lamb, New Summit Investments and BASIC Lead on this Investing for Impact event
10:00–10:10am	<i>Sponsor Update: Ed Lynch, Pax World Investments</i>
10:10–11:00am	Smart Beta: Is ESG Smart Enough?* Tom Kuh, MSCI; Karina Funk, Brown Advisory; Conor Platt, Etho Capital <i>*Submitted for CE for CFAs and CIMAs</i>
11:00–11:10am	<i>Sponsor Update: Anthony Eames, Calvert Research and Management / Eaton Vance</i>
11:10–11:40am	Break. Networking.
11:40–11:50am	<i>Sponsor Update: Danielle Burns and Mike Sakraida, First Affirmative Financial Network</i>
11:50am–12:00pm	<i>Sponsor Update: Greg Vigrass, Folio Institutional</i>
12:00–12:20pm	Beware the Disruptors Tom O'Shea, Cerulli Associates
12:20–12:25pm	<i>Sponsor Update: Tom Simunovic, Trillium Asset Management</i>
12:25–1:10pm	Buffet Lunch. Networking.
1:10–1:15pm	<i>Sponsor Update: Craig Churman, Saturna Capital</i>
1:15–2:05pm	Fixed Income's Expanding Impact in an Ever-Changing Investment Environment* David Sand, Community Capital Management; Jessica Brooks, Boston Community Capital; Rob Fernandez, Breckinridge Capital Advisors; Charles Sandmel, Intentional Endowments Network <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
2:05–2:10pm	<i>Sponsor Update: Kelly Brush, Parnassus Investments</i>
2:10–3:00pm	Impact in the Public Markets: The Critical Nature of Corporate Disclosure* Sanford Lewis, Attorney; Veena Ramani, Ceres; Natasha Lamb, Arjuna Capital <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
3:00–3:20pm	Break: Networking.
3:20–3:25pm	<i>Sponsor Update: Adam Kanzer, Domini Impact Investments</i>
3:25–3:30pm	<i>Sponsor Update: Colin Rennich, Appleseed Capital</i>
3:30–4:20pm	<i>Introduction by Green Century</i> What's an Investor to Do About Climate Change?* Leslie Samuelrich, Green Century Funds; Erin Kerr, Choate Investment Advisors; Jack Robinson, Trillium Asset Management; Jeff Gitterman, Gitterman Wealth Management <i>*Submitted for CE for CFPs, CFAs, CIMAs</i>
4:20–4:30pm	Wrap Up. Feedback. Evaluations.
4:30–5:30pm	Cocktail Reception.

