



Sunday, October 10, 2021				As Of: October 7, 2021			
2:00 PM - 5:30 PM	Conference Registration Broadmoor West: Mountain View Terrace						
4:30pm-7:00pm	Welcome Reception! Broadmoor West: Mountain View Terrace Cash Bar, Light Appetizers						
Monday, October 11, 2021							
Note: This is Saint Frances Xavier Cabrini Day in Colorado, Indigenous Peoples Day in some other States and Jurisdictions, and Columbus Day in some parts of the Country.							
7:30am-6:00pm	Conference Registration / Information Desk Open Broadmoor Hall: Reg Desk B						
08:30am-10:45am	First Affirmative Training, Firm Specific Information Broadmoor Main: Ballroom	Natural Investments Group Meeting E108					
10:45am -12:00pm	Track 1: Advocacy & Governance What We Can Learn from the Pandemic about Resilience: The Role of Advocacy in Creating Resilient Portfolios Sylvia Panek, Brenna St. Onge, E207/208/209 Bartolin Hall	Track 2: Community And Impact Investing: Focusing on Justice, Equity, Diversity & Inclusion (J.E.D.I.) Walking the Talk: The Way of J.E.D.I. Ivy Jack, Lauren Grattan, Mark Watson E210/211/212 Bartolin Hall	Track 3: ESG Integration Climate Risk: Who is Vulnerable and Where are the Investment Opportunities Garvin Jabusch, Julie Gorte, Caroline Draxl Approved for CFP CE Astor/Larkspur/Columbine				
12:00pm-1:15pm	Lunch & Welcome Sponsor: Calvert Research & Management Broadmoor Hall B						
1:15pm – 2:30pm	Track 1 Achieving Systemic Change: ESG Portfolios for the New Economy: Advocacy, Social Justice and Climate Risk Kim Griego-Kiel, David Bennell, Rex Raimond Approved for CFP CE E207/208/209	Track 2 Growing Your Practice – Why You Can't Ignore CDFIs Ebony Perkins, Mary Bruce Alford, Conor McFarland, Carrie Hanson Approved for CFP CE E210/211/212	Track 3 Mastering ESG Advice: A Participatory Workshop on Client Values Conversations Patrick Reed, Sylvia Panek Astor/Larkspur/Columbine				

2:30 – 3:00pm	Networking Break Broadmoor Hall B
3:00pm-4:00pm	Plenary: Why and How to Break the Investing Paradigm so as to Fix the World Monique Aiken, William Burckart, Jennifer Coombs, Jon Lukomnik Approved for CFP Board CE Broadmoor Hall B
4:00pm-5:00pm	Plenary: Race, Gender, Climate and Economics: How to Integrate What is Inseparable Kate Finn, Ivy Jack, Vanessa Roanhorse, Mark Watson Broadmoor Hall B
5:00pm – 6:00pm	Networking Break Broadmoor Hall B

6:00pm-8:00pm	Dinner Sponsor: Green Century Broadmoor Hall B
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Tuesday, October 12, 2021

7:30am-6:00pm	Conference Registration / Information Desk Open Broadmoor Hall: Reg Desk B			
7:30am-8:15am	Breakfast on your own			
8:15am-8:45am	Good Morning and Introductions (Mingling Exercise) Broadmoor Hall B			
8:45am-10:30am	“Meet the Sponsors” Presentations Plenary Broadmoor Hall B			
10:30am-10:45am	Networking Break Sponsor: Natural Investments			
Breakout Sessions 10:45am-12:00pm	Track 1 Town Hall Meeting: Advisors Share Ideas and Concerns Steve Schueth Facilitates the Wisdom of the Crowd E207/208/209	Track 2 High Impact Private Placements: The Galaxy’s Guide for Advisors & RIAs Malaika Maphalala, Liz Sessler, Bill Stoddart, Monica Miller Approved for CFP CE E210/211/212	Track 3 Managing Risks and Opportunities in ESG Portfolios Susan Ozawa Perez, Johann Klaassen, Matthew Segura, Pooja Khosla, Approved for CFP CE Astor/Larkspur/Columbine	

12:00pm-1:15pm	Buffet Lunch Sponsor: Praxis Mutual Funds Broadmoor Hall B				
1:15pm-1:30pm	Leslie Samuelrich: US SIF Update Broadmoor Hall B				
1:30pm-2:30pm	Plenary: Shareholder Advocacy: The Game Has Changed. Are We Winning? Danielle Fugere, Rick Alexander, David Krantz, Leslie Samuelrich, Broadmoor Hall B				
Breakout Sessions 2:45pm-4:00pm	Track 1 Engaging Clients in the Advocacy Vision: An Advisor Community Conversation Mark Regier, Bruce Herbert, Laura Isanuk, Victor Orozco E207/208/209	Track 2 Impact Measurement Essentials: Do or Do Not; There is No Try Caitlin Rosser, Casey Verbeck, Justina Lai E210/211/212	Track 3 The Role of Climate, Technology and Sustainability Reporting in Achieving 2050 Net-Zero Goals Pooja Khosla Approved for CFP CE Astor/Larkspur/Columbine		
4:00pm-4:15pm	Networking Break Broadmoor Hall B Foyer				
4:15pm-5:15pm	Plenary: Plenary: Greenwashing & Impact Tradeoffs: The Next Frontier in SRI / ESG Investing Theresa Gusman, Katherine Kroll, Gabe Rissman, Brian Svendahl Approved for CFP CE Broadmoor Hall B				
5:15pm – 6:30pm	ATTENDEES IN ACTION: Accessing the Power of the Network Topic Tables or Working Groups on Big Picture Issues Broadmoor Hall B				
6:45pm-7:00pm	Sponsor Presentations & Recognitions				
7:00pm-7:30pm	Why We Do What We Do Michael Kramer: Natural Investments Kim Griego-Kiel: Horizons Sustainable Financial Services Shane Yonston, Impact Investors Amy Thacker, First Affirmative Financial Network Broadmoor Hall B				
7:30pm-9:00pm	Dinner Sponsor: SKBA Broadmoor Hall B				
Final Morning					
7:45am-10:00am	Conference Registration / Information Desk Open				



RESTAURANTS

1. PLAY Bowling Alley at the Broadmoor
2. Ristorante del Lago & Bar
3. Natural Epicurean
4. The Lake Terrace Pool Café
5. Summit
6. Golden Bee
7. The Grille
8. Hotel Bar
9. Lake Terrace Dining Room
10. Café Julie's
11. La Taverne



SUNDAY EVENTS

- A. Vaccine and Registration Desk
Welcome Reception
~ Mountain View Terrace ~



MONDAY, TUESDAY & WEDNESDAY EVENTS

- B. Vaccine, Information & Registration Desks
Broadmoor Hall B Lobby
- C. Breakout Sessions
* Bartolin Hall ~ 2nd Floor (see below)
- D. Plenary Sessions, Exhibitors, Lunch, Networking, Dinners
Broadmoor Hall B
- E. Other Sessions
Broadmoor Hall B ~ 2nd Floor
(Astor, Larkspur, Columbine)

* Access to Bartolin Hall 2nd Floor

CONFERENCE ROOMS

1. Broadmoor Main
2. Spa, Golf, and Tennis Complex
3. Broadmoor South
4. Broadmoor West
5. Cheyenne Lodge/Mountain Clubhouse
6. Broadmoor Hall A & B
1. International Center
2. Colorado Hall
3. The Fish House
4. The Broadmoor Estate House
5. Bartolin Hall