


Sunday, October 23, 2022

As Of: October 24, 2022

2:00 PM - 5:30 PM	<p>CONFERENCE REGISTRATION</p> <p>Conference Level: Registration</p>
<p>3:30 PM - 5:30 PM</p> <p>3:30 – 3:45</p> <p>3:45 – 5:15</p> <p>5:15 PM – 5:30 PM</p>	<p>Conference Kick-Off, Hosted by First Affirmative</p> <p>Open to all participants</p> <p>Welcome: George Gay</p> <p>First Affirmative's Values-Aligned Direct Index Solution (VADIS)</p> <p>Featuring partners – First Affirmative (Theresa Gusman and Richard Frankel), YourStake (Patrick Reed and Gabe Rissman), Orion (Chris Romano), and Apex (Megan Hausmann) – this presentation will empower advisors to better serve their clients and grow their business. Our innovative solution features unrivaled values-driven client assessment and customization, accessibility, and transparency. Learn more about recent enhancements to our low-cost, low-minimum, easy-to-implement Values-Aligned Direct Index Solution at this session.</p> <p>If you are unable to arrive in time for this session, it will be presented again on Tuesday afternoon.</p> <p>Key Compliance Points: Kathy Lewis</p> <p><i>Cheyenne Ballroom</i></p>
5:30pm-7:00pm	<p>WELCOME RECEPTION!</p> <p><i>Cheyenne Courtyard</i></p> <p>Cash Bar, Light Appetizers</p>
	 <p>DINNER ON YOUR OWN:</p> <p>Please Make Reservations</p> <p>Gates Grille</p> <p>Elevations</p> <p>Mountain View Dining Room - Buffet</p>

Monday, October 24, 2022					
7:30am-6:00pm	<p>CONFERENCE REGISTRATION</p> <p>Information Desk Open</p> <p>Conference Level Registration</p>				
7:15am-8:00am	<p>BREAKFAST</p> <p>White River and Pre-Function Space</p>				
8:00am-8:20am	<p>Good Morning and Introductions of Scholars</p> <p>Colorado Ballroom</p>				
8:20am-10:15am	<p>Meet Our Hosts and Benefactors: Purpose Driven Leaders You Really Need to Know!</p> <p>Colorado Ballroom</p>				
10:15am-10:30am	<p>Coffee Break</p> <p>Grand Rivers & White River Foyers</p>				
For All Breakouts	Track 1: Advocacy & Governance	Track 2: Community and Impact Investing: Focusing on Justice, Equity, Diversity & Inclusion	Track 3: ESG Integration	Track 4: Professional Education	
10:30am—11:30am	<p><u>How Is G Stalling Progress on E and S? Can we Fix it?</u></p> <p>Paula Glick, William Hsu, Lisa Lindsley, Holly Testa</p> <p>Approved by CFP Board for CE Credit</p> <p>Arkansas & Platte</p>	<p><u>: Place Based Investing – What Is It and How Does It Help Communities</u></p> <p>Monica Miller, Jordana Pleat, Laura Mixter, Brady Quirk-Garvan</p> <p>Approved by the CFP Board for CE Credit</p> <p>Rio Grande & Gunnison</p>	<p><u>Addressing Climate Transition and Physical Risks-ESG Integration in Action</u></p> <p>Emily Lee, Julie Gorte, Pooja Khosla, Dina Ciarmatori</p> <p>Approved by CFP Board for CE Credit</p> <p>Amphitheater</p>	<p>The Future of Wealth Management is Here Now: So you Want to Specialize in Sustainable & Impact Investing</p> <p>Greg Berry, Megan Buchanan, Robyn Wood, Bob Helmuth</p> <p>Approved by the CFP Board for CE Credit</p> <p>Cheyenne 1&2</p>	
11:40am -12:40pm	<p><u>How We Can and Must Curb Climate Change: Inspiring Stories from the Field</u></p> <p>Yusuf George, Courtney Keatinge, Allan Pearce, Michael Kramer</p> <p>Arkansas & Platte</p>	<p><u>Redirecting Capital for Racial Equity through Fixed Income Investing</u></p> <p>Sharlene Brown, Alyssa Greenspan, Justin Conway, Homero Radway, Marvin Owens</p> <p>Approved by CFP Board for CE Credit</p> <p>Rio Grande & Gunnison</p>	<p><u>The Problem with ESG Data</u></p> <p>Theresa Gusman, Madeline Barconi, Sujeesh Kurup, Patrick Reed, Sophia Sung</p> <p>Approved by CFP Board for CE Credit</p> <p>Amphitheater</p>	<p><u>Digital Assets, Web 3 and Impact Investing</u></p> <p>David Bennell, Dail St. Claire, Mike Dipetrillo, Mirtha Kastrapeli</p> <p>Approved by CFP Board for CE Credit</p> <p>Cheyenne 1 & 2</p>	

12:40pm-1:30pm	<p>LUNCH</p> <p>Sponsor: Praxis</p> <p><i>Colorado Ballroom I, II & III</i></p>			
1:35pm – 2:35pm	<p><u>Engagement from a Fixed Income Perspective</u></p> <p>Benjamin Bailey, Alyssa Greenspan, Heike Reichelt, Alya Kayal</p> <p>Approved by the CFP Board for CE Credit</p> <p><i>Arkansas & Platte</i></p>	<p>Collaborating on Private Investments: A Working Session for Impact RIAs</p> <p>Malaika Maphalala, Leaders from Impact Focused RIAs</p> <p><i>Rio Grande & Gunnison</i></p>	<p><u>Greenwashing: Myth Busting, Fund Due Diligence and Building Portfolios for Principles and Performance</u></p> <p>Robert Klaber, Marcela Pinilla, Fabian Willskytt, Gabe Rissman</p> <p>Approved by CFP Board for CE Credit</p> <p><i>Amphitheater</i></p>	<p><u>The Many Costs and Benefits(?) of High Inflation.</u></p> <p>Megan Morrice, Matthew Segura, Julia Wilkinson, Jenny Coombs</p> <p>Approved by CFP Board for CE Credit</p> <p><i>Cheyenne 1 & 2</i></p>
2:35 – 3:00pm	<p>NETWORKING BREAK</p> <p><i>White River & Pre-Function Space</i></p>			
3:00pm-4:00pm	<p><u>Impact Versus ESG: Measuring, Communicating and Utilizing Impact Metrics Instead of ESG Data</u></p> <p>Gabe Rissman, Junko Usuba, Fabian Willskytt, Erin Gray</p> <p>Session has been Approved by CFP Board for CE Credit</p> <p>Sponsor: Matthews Asia</p> <p><i>Colorado Ballroom</i></p>			
4:00pm-5:00pm	<p>Advancing Racial Equity</p> <p>Susan Ozawa Perez, Jewell Fears, Denise Beal, Tejal Patel</p> <p><i>Colorado Ballroom</i></p>			
5:00pm – 6:00pm	<p>NETWORKING BREAK</p> <p><i>White River & Pre-Function Space</i></p>			

6:15pm-7:30pm	<p>DINNER</p> <p>Sponsor: SKBA, Green Century</p> <p><i>Colorado Ballroom I, II & III</i></p>

Tuesday, October 25, 2022					
7:30am-6:00pm	Conference Registration / Information Desk Open <i>Conference Level Registration</i>				
7:00 – 7:30am	BARRE 3 Strength, Cardio & Mindfulness <i>Mountain Room</i>				
7:40am-8:40am	BREAKFAST Sponsor: Green Money Journal / GreenMoney.com <i>White River & Pre-Function</i>				
8:45am-10:00am	Remaining Compliant in an Ever-Changing Regulatory Environment for ESG Kim Griego-Kiel, Julie Skye, William Nelson, Kathy Lewis <i>Colorado Ballroom</i>				
10:00am-10:45am	NETWORKING BREAK <i>White River & Pre-Function</i>				
Breakout Sessions 10:45am-11:45pm	<u>Walking the Talk on Proxy Voting, Engagement and Advocacy for Impact</u> Mark Regier, Tim Smith, Kathy Leonard, Holly Testa <i>Arkansas & Platte</i>	<u>Designing and Measuring Impact Bond Portfolios: An Issuer's Perspective</u> Jessica Brooks, Kathleen Keefe, Jackie Logan, Lily Ambrosius, Anna Smukowski Approved by CFP Board for CE Credit <i>Rio Grande and Gunnison</i>	<u>ESG in the Global Context & Investing Sustainably in Emerging Markets</u> Pooja Khosla, Amberjae Freeman, Julia Fish, Vivek Tanneeru Approved by the CFP Board for CE Credit <i>Amphitheater</i>	<u>Tips for a Simpler- and More Effective, Sustainable Investing Conversation.</u> Kylelane Purcell, Jay Nolan Approved by CFP Board for CE Credit <i>Cheyenne 1 & 2</i>	
11:45am-1:15pm	LUNCH Sponsored Topic Tables. Sponsor: Natural Investments <i>Colorado Ballroom</i>				
1:15pm-1:30pm	US SIF Update: Lisa Woll <i>Colorado Ballroom</i>				
1:30pm-2:40pm	The Politics of ESG: Culture Wars at our Doorstep Jon Hale, Lisa Woll, Joe Keefe, Lenore Reiner <i>Colorado Ballroom</i>				
Breakout Sessions 2:50pm-3:50pm	<u>Can Third-Party Audits Light the Way Towards a Just and Equitable Economy?</u>	Reparative Capital to Drive Systems Change	<u>Navigating the Energy Transition Within Fixed Income Markets</u>	<u>Expanding Social Impact Charitable Gifting</u>	

	Kaitlyn Mitchell, Hyewon Han, Marissa Lafave, Tejal Patel <i>Arkansas & Platte</i>	Lolita Nunn, Mark Watson, Renee Morgan, Marvin Owens, Malaika Maphalala <i>Rio Grande & Gunnison</i>	Brian Svendahl, Colby Stilson, Stephen Liberatore, Vamsi Alla Approved by CFP Board for CE Credit <i>Amphitheater</i>	Brady Quirk-Garvan, Brian Howell, Jordana Fremed Approved By CFP Board for CE Credit <i>Cheyenne 1&2</i>	
3:50pm-4:15pm	NETWORKING BREAK <i>White River & Pre-Function</i>				
4:15pm-5:15pm	50 Years of Advocacy and Where We Go Next! Leslie Samuelrich, Joe Keefe, Lisa Hayles, Tim Smith <i>Colorado Ballroom</i>				
5:20pm-6:20pm	TIME ON YOUR OWN: RELAX, REFRESH Or Optional Replay of VADIS Intro Cheyenne Ballroom				
6:15pm-7:00pm	HAPPY HOUR Sponsor: <i>Colorado Ballroom</i>				
7:00pm-7:30pm	Why We Do What We Do Julie Skye Mark Regier Theresa Gusman <i>Colorado Ballroom</i>				
7:30pm-11:00pm	DINNER Sponsor: YourStake <i>Colorado Ballroom</i> Celebration Party				
Final Morning, Wednesday, October 26, 2022					
7:45am-10:00am	Conference Registration / Information Desk Open Conference Level				

