



AGENDA: October 8–11, 2023

As of October 4, 2023

We hope you are planning to join us at the beautiful
Omni Interlocken Hotel in Broomfield, Colorado — between Denver and Boulder.



ESG for Impact! Schedule of Events 2023

Sunday, October 8, 2023	
2:00 PM - 5:30 PM	CONFERENCE REGISTRATION Atrium
3:15- 4:10 PM	Pre-Conference Bonus Continuing Educational Session Money for Nothing? Not Anymore. What are the Implications of Higher Costs of Capital for Impact Investing? Matthew Segura, Omar Blayton, Anna Smukowski (Approved for CFP CE) Centennial
4:15 – 6:00	Conference Kick-Off: The Forefront of Innovation Hosted by First Affirmative All participants are encouraged to attend! Welcome: George Gay New Technologies in Financial Services: Kathleen Wrynn Artificial Intelligence Applications in Financial Services; Patrick Reed Next Generation Direct Indexing: Theresa Gusman, Patrick Reed <i>Interlocken Ballroom</i>
6:00pm- 7:00pm	WELCOME RECEPTION! SPONSOR: Yrefy <i>Pavilion / Lawn</i> Cash Bar, Light Appetizers
	DINNER ON YOUR OWN: Local Locations Nearby

Monday, October 9, 2023					
7:30am-6:00pm	CONFERENCE REGISTRATION / INFORMATION DESK OPEN <i>Atrium</i>				
7:15am-8:00am	BREAKFAST <i>Centennial Foyer & Interlocken Foyer</i>				
8:00am-8:30am	Good Morning! Introduction to Scholarship Recipients <i>Interlocken Ballroom</i>				
8:30am-10:15am	Meet Our Hosts and Benefactors: Purpose Driven Leaders You Really Need to Know! <i>Interlocken Ballroom</i>				
10:15am – 10:30am	Coffee Break				
10:30am-11:30am	Transforming Our Food Systems: The Purpose and Power of Regenerative Agriculture Speakers: Elysabeth Alfano, Clark Harshbarger, Roberto Meza, Jolie Brawner Sponsor: <i>Interlocken Ballroom</i>				
BREAKOUT TRACKS	Track 1: Advocacy & Governance	Track 2: Community and Impact Investing: Focusing on Justice, Equity, Diversity & Inclusion	Track 3: ESG Integration	Track 4: Professional Education	
11:40am— 12:40pm	Using your Portfolio to Advance Reproductive Health, Rights and Justice Dorrit Lowsen, Natasha Lamb, Renee Morgan, Kaitlyn Mitchell Pine	The Case for Place-Based Local Investments Keisha Bolden, Kathleen Keefe, Anna Mabrey, Anna Smukowski Ponderosa	ESG Integration in Alternative Assets Samuel Adams, Seydina Fall, Bill O’Conner, Marshall Dunford (Approved for CFP CE) Centennial E	ESG Market Dynamics: Opportunities, Risks and What Lies Ahead Shaheen Contractor, Witold Henisz, Amber Deleo (Approved for CFP CE) Centennial F	

12:40pm-1:30pm	LUNCH Sponsor: Natural Investments <i>Interlocken Ballroom</i>				
1:40pm -2:40pm	A Fresh Look at the Power of Proxy Voting Heidi Welsh, Courteney Keatinge, Alan Reid, Annie Sanders Pine	Creativity, Connection and Community: ESG+I and Indigenous Investment Success Kate Finn, Clay Colombe, Keoni Lee, Ponderosa	Examining Challenging Issues of Sustainability Victor Orozco, Julie Gorte, Greg Murphy, Emily Lee (Approved for CFP CE) Centennial E	Adding Private Impact Investments to Client Portfolios Monica Miller, Seydina, Fall, Natasha Lamb (Approved for CFP Centennial F	
2:40 – 3:00pm	NETWORKING BREAK <i>Centennial Foyer & Interlocken Foyer & Atrium</i>				
3:00pm – 4:00pm	Protecting Biodiversity on a Warming Planet Annie Sanders, Glen Hurowitz, Allan Pearce, Megan Waters (Approved for CFP CE) Pine	Finding Your Racial Equity Investing Direction Will Mucci, Alyssa Greenspan, Santhosh Ramdoss, Ebony Brown Ponderosa	Building Resilient ESG Portfolios: Blue Skies & Headwinds Brian Svendahl, Shivani Vohra, Mark Sloss, Akasha Absher (Approved for CFP CE) Centennial E	Robotic or Regenerative: AI Machine Learning and its Influence on Impact David Bennell, Anna Lerner Nesbitt, Dail St. Claire, (Approved for CFP CE) Centennial F	
4:00pm-5:00pm	Impact Contenders & Pretenders: Why Standards Matter Michael Kramer, Julie Gorte, Jon Hale, Andy Behar, Rachel Robasciotti Sponsor: Calamos Investments Interlocken Ballroom				
5:00pm – 6:00pm	NETWORKING BREAK <i>Centennial Foyer & Interlocken Foyer & Atrium</i>				
6:15pm-7:30pm	DINNER Sponsor: Green Century <i>Interlocken Ballroom</i>				

Tuesday, October 10, 2023				
7:30am-6:00pm	CONFERENCE REGISTRATION / INFORMATION DESK OPEN Atrium			
7:40am-8:40am	BREAKFAST Sponsor: US SIF <i>Centennial Foyer & Interlocken Foyer</i>			
8:45am-10:00am	Remaining Compliant in an Ever-Changing Regulatory Environment for ESG William Nelson, Kathy Lewis, Sponsor: Clarity AI Interlocken Ballroom			
10:00am-10:45am	NETWORKING BREAK <i>Centennial Foyer & Interlocken Foyer & Atrium</i>			
Breakout Sessions 10:45am-11:45pm	Hot Topics in Shareholder Advocacy Dina Ciarmatori, Marian Macindoe, Larisa Ruoff, Kate Monahan Pine	Regenerative Agriculture: Investments that Grow Monica Miller, Mark Lewis, Joel Moyer, Skya Ducheneaux Submitted for CFP CE Ponderosa	Empowering Informed Investment: Navigating Global ESG Integration Strategies and Regulations for a Sustainable Future Glen Yelton, Terrence Gray, Gabe Rissman, (Approved for CFP CE) Centennial E	The Conversation: How to Reframe Sustainable Investing Challenges in Discussions with Allocators and Clients Amy Wilson, Kate Moore, Jenny Coombs, Joe Sinha (Approved for CFP CE) Centennial F
12:00pm-1:15pm	LUNCH Sponsor: Praxis Mutual Funds Interlocken Ballroom			
1:15pm-1:30pm	US SIF Update Maria Lettini, CEO Interlocken Ballroom			
1:30pm-2:40pm	The Politics of ESG: Culture Wars at our Doorstep Hon. Seth Magaziner, Peter Krull, Jina Penn-Tracy, Keith Johnson, Maria Lettini Interlocken Ballroom			

<p>Breakout Sessions 2:50pm-3:50pm</p>	<p>On the Cutting Edge: Innovations in Understanding and Measuring Shareholder Advocacy Dan Berlingeri, Mark Regier, Julie Skye, Danny Katz Pine</p>	<p>Practice What You Preach: DEI in Practice Management Angela Barbash, Jock Payten, Sylvia Panek Ponderosa</p>	<p>Sustainability Risk is Business and Investment Risk Molly Podolefsky, Andrew Olig, Bruce Kahn, Pooja Khosla (Approved for CFP CE) Centennial E</p>	<p>The Name is Bond...Green Bond: Impact Fixed Income Explained Alya Kayal Benjamin Bailey, Sezin Paydas, Elizabeth Alm, CFA (Approved for CFP CE) Centennial F</p>
<p>3:50pm-4:15pm</p>	<p style="text-align: center;">NETWORKING BREAK <i>Centennial Foyer & Interlocken Foyer & Atrium</i></p>			
<p>4:15pm-5:30pm</p>	<p style="text-align: center;">Women, Wealth and Well-Being Angela Librizzi, Jan Bryan, Angela Barbash, Madeline Barconi (Approved for CFP CE) Interlocken Ballroom</p>			
<p>5:30pm-6:20pm</p>	<p style="text-align: center;">TIME ON YOUR OWN: RELAX, REFRESH</p>			
<p>6:15pm-7:00pm</p>	<p style="text-align: center;">HAPPY HOUR Sponsor: Interlocken Ballroom</p>			
<p>7:00pm-7:40pm</p>	<p style="text-align: center;">Lawrence Ford: The Extraordinary Power of the Purpose Driven Wealth Manager Why We Do What We Do Joe Keefe, Erin Gray (tentative), Collin Todd Interlocken Ballroom</p>			
<p>7:40pm-11:00pm</p>	<p style="text-align: center;">DINNER Sponsor: Calvert Research & Management Sponsor: YourStake Appreciations Celebration Party & Dance Interlocken Ballroom</p>			
<p>Wednesday, October 11, 2023 Final Morning</p>				
<p>7:45am-10:00am</p>	<p style="text-align: center;">CONFERENCE REGISTRATION / INFORMATION DESK OPEN Atrium</p>			

Hoping to see you October 8–11, 2023 at the Omni!

