I VOTE FOR A NEW ECONOMY

FINANCE & DEMOCRACY

CONFLUENCE PHILANTHROPY’S 6TH ANNUAL PRACTITIONERS GATHERING

OWN WHAT YOU OWN!

INVESTORS FOR CLIMATE SOLUTIONS

MARCH 9TH-11TH, 2016
The Charles Hotel, Cambridge, MA

#ownwhatyouown
Time Slots | BASIC TRACK (COMSTOCK) | PRACTITIONERS INSTITUTE* (KENNEDY)
---|---|---
7:00 | Registration Opens (7:00 - 9:00) | 
7:30 | | 
8:00 | | Breakfast at The Charles Hotel - Comstock & Kennedy (7:30 - 9:00)
8:30 | | 
9:00 | Introduction to Structures in Mission Related Investing (9:00 - 10:15) | Keynote with Neva Goodwin: Shifting Systems (9:00 - 10:00)
9:30 | Break (10:20 - 10:30) | Plenary: Shifting Values (10:00 - 11:00)
10:00 | Thematic Investing: Solution-Oriented Public Equity Investments (10:30 - 11:30) | Break (11:00 - 11:15)
11:00 | Influencing and Changing Corporate Behavior – Enhancing the Impact of your Public Equities Investments (11:30 - 12:30) | Plenary: Shifting Institutions (11:15 - 12:30)
12:00 | | Lunch (12:30 - 1:45)
12:30 | | 
1:00 | Two Small Sessions - Choose One (1:45 - 3:00) | 
1:30 | | 
2:00 | | Two Small Sessions - Choose One (3:15 - 4:30)
2:30 | | Break (3:00 - 3:15)
3:00 | | 
3:30 | | 
4:00 | | 
4:30 | | Break (4:30 - 4:45)
5:00 | Three Small Sessions - Choose One (4:45 - 6:00) | 
5:30 | | 
6:00 | Funder-Only Reception Henrietta's Table (6:00 - 7:00) | 
6:30 | | 
7:00 | | 
7:30 | | Funder-Only Dinner Henrietta's Table (7:00 - 9:00)
8:00 | | 
8:30 | | 

* Note: Attendees to the Practitioner’s Institute track must be members of the Confluence Practitioner’s Program
## Time Slots

<table>
<thead>
<tr>
<th>Time Slots</th>
<th>THURSDAY, MARCH 10, 2016</th>
<th>FRIDAY, MARCH 11, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00</td>
<td>Registration Opens (7:00 - 9:00) Breakfast with Ad Hoc Sessions - Comstock &amp; Kennedy (7:00 - 8:30)</td>
<td>Special Breakfast Meeting: Investing in Water Sustainability Compton (7:30 - 8:30)</td>
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<td>7:30</td>
<td>Special Breakfast Meeting: Sustainable Fisheries Rogers (7:30 - 8:30)</td>
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<td>8:00</td>
<td>Board Welcome (8:30 - 9:00)</td>
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<td>8:30</td>
<td>Member's Keynote with Mitchell Kapor (9:00 - 10:00)</td>
<td>Plenary: Investors Reflections with The Rockefeller Brothers Fund (9:00 - 10:15)</td>
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<td>9:00</td>
<td>Break (10:00 - 10:15)</td>
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<td>10:00</td>
<td>Plenary: The Influence of Money in Democracy Special Address: Dennis Kucinich (10:15 - 11:45)</td>
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<td>Community Reflections (11:45 - 12:15)</td>
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<td>2:00</td>
<td>Confluence Townhall Meeting (2:15 - 7:00)</td>
<td>The Climate Solutions Summit (2:15 - 7:00)</td>
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<td>Please pick up the Climate Solutions Summit program at the registration desk.</td>
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<td>7:30</td>
<td>Evening Plenary: Scaling Impact: Gaining Velocity or Losing Ground? (6:00 - 7:30)</td>
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<td>8:00</td>
<td>#1 Dinner - Ballroom (7:30 - 9:00)</td>
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<td>8:30</td>
<td>#2 Dinner: Inside/Outside Strategies to Keep It In the Ground (7:30 - 9:00)</td>
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<td>9:00</td>
<td>#3 Dinner: Moving Capital Markets to Account for a Sustainable Future (7:30 - 9:00)</td>
<td>American Bandstand Dance Party and Networking Event Ballroom (9:00 - 11:00)</td>
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GETTING TO THE HOTEL & CONFERENCE SITE

TRANSPORTATION FROM AIRPORT
Please be advised that The Charles Hotel does not offer an airport shuttle service. A one-way taxi ride from Logan Airport to The Charles Hotel is estimated at $50.

DRIVING DIRECTIONS

FROM LOGAN AIRPORT
Departing Logan Airport, follow signs for Route 90 (Mass Pike) West. Take Route 90 (Mass Pike) to Exit 20 (Brighton/Cambridge). Bear right after the tollbooth and follow the sign for Cambridge. At the bottom of the ramp, turn left at the second traffic light on onto Soldiers Field Road. This is just before the Charles River and there is no street sign. Follow Soldiers Field Road approximately 1/2 mile and take the "Harvard Square" exit. Turn right off of the exit ramp and proceed over the bridge. Continue straight across Memorial Drive past the first light onto J.F.Kennedy Street and turn left at the second light onto Eliot Street. Bear left at the next intersection onto Bennett Street and The Charles Hotel is immediately on your left.

FROM THE NORTH (I-93 SOUTH)
Heading south on Route 93, exit onto Storrow Drive West. Continue on Storrow Drive West to the "Harvard Square/Cambridge" exit. Turn right off of the exit ramp and proceed over the bridge. Continue straight across Memorial Drive past the first light onto J.F. Kennedy Street and turn left at the second light onto Eliot Street. Bear left at the next intersection onto Bennett Street and The Charles Hotel is immediately on your left.

FROM THE SOUTH (I-93 NORTH)
Heading north on Route 93, exit onto Route 90 (The Mass Pike), follow The Mass Pike to Exit 20 (Brighton/Cambridge). Bear right after the tollbooth and follow the sign for Cambridge. At the bottom of the ramp, turn left at the second traffic light onto Soldiers Field Road. This is just before the Charles River and there is no street sign. Follow Soldiers Field Road approximately 1/2 mile and take the "Harvard Square" exit. Turn right off of the exit ramp and proceed over the bridge. Continue straight across Memorial Drive past the first light onto J.F. Kennedy Street and turn left at the second light onto Eliot Street. Bear left at the next intersection onto Bennett Street and The Charles Hotel is immediately on your left.

FROM THE WEST
Take the Mass Pike/Route 90 East towards Boston to Exit 18 (Brighton/Cambridge). Bear right after the tollbooth and follow the sign for Cambridge. Continue straight over the River Street Bridge. At the bottom of the bridge, take an immediate left onto Memorial Drive. At the third traffic light, turn right onto J.F. Kennedy Street and then turn left at the first light onto Eliot Street. Bear left at the next intersection onto Bennett Street and The Charles Hotel is immediately on your left.

FROM MBTA (RED LINE)
Follow the signs inside the station to the Harvard Square exit. Once on the street level, proceed down Brattle Street, Brattle Street will fork to the Right, but you should stay straight. Turn right onto Bennett Street and The Charles Hotel is immediately on your left.

HOTEL PARKING
Parking is available in the Charles Square Garage, located beneath the Charles Hotel. The garage offers free Electric Vehicle charging, bike sharing, tire inflation, and an innovative small car discount program. The garage is accessible from the hotel lobby, and guests of The Charles Hotel can have their parking ticket validated for in/out access during their stay.

CONTACTS

CONFLUENCE PHILANTHROPY
General Office
(212) 812-4367

STAFF CELL NUMBERS FOR EVENT HOURS
Camille Goulding
Event Logistics Manager
(347) 841-2324

Sarah DeNicola
Membership Program Manager
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Roger Miller
Chief Operating Officer
(510) 410-0720

Dana Lanza
CEO
(718) 499-4935
THE CHARLES HOTEL, CAMBRIDGE, MA

FLOORPLAN: THIRD FLOOR
MOST OF THE PRACTITIONER GATHERING AND CLIMATE SUMMIT EVENTS ARE ON THIS LEVEL

FLOORPLAN: FIRST FLOOR
ONSITE EVENING SOCIAL EVENTS

THURSDAY, MARCH 10TH - ROGERS
7:30 PM | SPECIAL DINNER: MOVING CAPITAL MARKETS TO ACCOUNT FOR A SUSTAINABLE FUTURE - A DINNER CONVERSATION WITH THE SUSTAINABILITY ACCOUNTING STANDARDS BOARD (SASB)
Please sign up in advance at the registration desk

Please join Jean Rogers, founder and CEO of the Sustainability Accounting Standards Board, and Bob Eccles, the founding Chairman of SASB, professor at Harvard University and Chairman of Arabesque Partners discuss the ideas and people behind the origin of SASB, and what it takes to move the capital markets to account for a sustainable future. Kat Taylor, Co-Founder & CEO of Beneficial State Bank will provide a welcome and introduction.

Sponsored by TomKat Foundation

THURSDAY, MARCH 10TH - STRATTON
7:30 PM | SPECIAL DINNER: INSIDE/OUTSIDE STRATEGIES TO KEEP IT IN THE GROUND
Please sign up in advance at the registration desk

How can an armada of Kayaktivists work strategically on the outside to strengthen the hand of investors who are at the center of the Divest/Invest Movement? This panel will explore how Kayaktion and other creative peaceful tactics can be real game changers in keeping fossil fuels safely in the ground, by challenging oil, gas, and coal’s infrastructure on the waterways where they have operated with impunity for far too long.

By harnessing the power of the market while simultaneously punishing bad corporate actors who are damaging our planet we can speed the just transition to a clean energy future and a stable climate for our children.

Sponsored by As You Sow Foundation

HOTEL RELAXATION AREAS

Corbu Spa & Salon offers a harmonious escape from the stresses of urban life. The French-influenced spa menu is peppered with ingredients handpicked from local gardens. Touches of nature are incorporated into our architecture. Relax as your skilled therapist crafts a personalized experience for you that will optimize your good health and have your body and mind celebrating ‘la vie en rose.’

Henrietta’s Table honors the culinary bounty of New England. Chef Peter Davis uses organic and native ingredients from local producers in and beyond Massachusetts to create an original and simple approach to classic regional cuisine. His keen awareness of the integrity of food in its natural state, eye for color and instinct for balance of tastes has earned him both local and national critical acclaim. The restaurant serves breakfast, lunch and supper seven days a week, along with an award-winning weekend brunch. During the spring and summer, guests can enjoy dining on the Henrietta’s large outdoor patio.

Noir is a chic, cozy bar serving classic cocktails mixed to perfection, sultry signature drinks and a menu suited for a late afternoon or late night snack. Designed to reflect the warm, decadent atmosphere of 1940’s nightlife, it is the ideal place to meet after work, before a show or to wind down from a busy night. Located in the hotel lobby with a lively outdoor patio during the warmer months, Noir is the perfect spot for your next holiday party, corporate, social or celebratory event. It accommodates up to 100 guests and is open daily from 4:00pm to 2am. For private events, we have a high-definition TV/projector available for DVD and power point presentations.

Regattabar opened on January 29, 1985 and has since become the leading jazz club not only in Boston, but in all of New England. Boston Magazine bestowed its “Best of Boston Award” thirteen times naming Regattabar “The Best Jazz Club.” In 1998 they inducted Regattabar into its “Best of Boston Hall of Fame.” Regattabar has also been named “Best Jazz Club” by both the Boston Phoenix and the Improper Bostonian. Located on the third floor of The Charles Hotel, Regattabar showcases musical greats as Bo Diddley, Cassandra Wilson, and Ahmad Jamal. It features shows up to five nights a week is home to the annual Regattabar Jazz Festival.

The Rialto is a welcoming gathering place for the community and hotel guests, patrons enter the restaurant via a white stone path inspired by an ancient Roman road, passing by the illuminated onyx bar into the dining room. Curved banquets and cozy nooks invite intimate conversation while pumpkin, olive and white draperies evoke the warm colors of the Italian countryside. In warm weather Rialto’s new terrace offers alfresco dining in the shade of a saffron awning amid vine-covered trellises. The Boston Globe awarded Rialto a coveted four stars in three consecutive reviews and Gourmet Magazine named it one of the “World’s Top Hotel Restaurants.”
CONFLUENCE PHILANTHROPY

Confluence Philanthropy supports and catalyzes the work of private, public and community foundations, individual donors, and investment firms who are committed to moving philanthropy towards mission-aligned investment. At our 6th Annual Conference, our international network represents nearly $155 billion in philanthropic assets under management, and $1.3 trillion in managed capital. Confluence is an international organization, with the majority of members based in the U.S., and a handful in Europe, Canada, and Mexico. Our members represent a diversity of institutions, charitable asset types, personal and professional roles, and programmatic missions, but they all share a commitment to mission-aligned philanthropy.

From its annual conference, to webinars and trainings, to working groups focused on specific areas of investment and change strategies, Confluence’s programs translate learning and connection into concrete action. We promote mission alignment through a variety of asset classes, investment vehicles and advocacy strategies, including cash, proxy voting, shareholder engagement, program-related investing, screening public equities, and private equity.

We have offices in New York City at The Rockefeller Brothers Fund and in downtown Oakland, California.

We always hear about the rights of democracy, but the major responsibility of it is participation.

- WYNTON MARSALIS

Information is the currency of democracy.

- THOMAS JEFFERSON
BECOME AN ADVISOR MEMBER

Through our Advisor Membership Program, investment advisors and managers committed to mission alignment participate directly in Confluence, helping to break down walls between funding institutions and the Impact Investment field, leading to new strategies and opportunities.

Advisor Membership includes leading investment advisors, money managers, investment consultants, and asset managers in mission-related investing. Advisors play visible leadership roles in helping to develop the content for more than 20 Confluence events annually; they serve as resources to the Confluence community, as industry spokespersons, and as partners in leading philanthropy.

HOW ARE ADVISORS CHOSEN?

Advisors are chosen through a peer-referred process. Each Advisor must hold at minimum a three-year track record in mission-related investing and have three referrals from foundations or other members of our network (e.g., investment advisors to our member foundations, individual donors, family offices, etc.). They must then complete an application form to be reviewed by the Confluence Board of Directors. Applications are reviewed by the Membership Committee with recommendation to the Confluence Board of Directors for approval.

PROTECTING OUR MEMBERS PRIVACY

Advisor Membership is not a “pay to play” service. Confluence will not under any circumstances share the contacts of our philanthropic members with Advisor Members. If a member would like to connect with an Advisor, they must do so directly. Further, Advisors are promised neither speaking engagements at our events nor access to any of the funder-only areas of our website. Advisors are encouraged to share their research and publications, which they may post to the Listserve or share with Confluence staff to post in the library.

ADVISORS MEMBER BENEFITS

• Firm’s brand and summary description listed in the public area of the Confluence website
• Recognition among an elite group of the top firms in Impact Investing
• Participation in Confluence working groups
• Opportunity to propose annual conference sessions
• Subscription to the Advisors’ Listserve
• Co-branding opportunities
• Larger sponsorship opportunities
• Speaking opportunities at Confluence events (not guaranteed)
JOIN THE PRACTITIONERS PROGRAM

Confluence provides value to a wide spectrum of members, including those freshly committed to mission alignment, those working incrementally within institutions, and those who have achieved 100% mission alignment who seek to exercise sector-wide leadership. Practitioner Members range from small, focused, family foundations to some of the largest endowments but share a vision to leverage capital for multiple funding themes.

Membership in the Practitioners’ Program is open to philanthropic organizations, donor funds, single family offices and individuals who seek to deepen their practice in mission-related investing by working collaboratively and strategically with other grantmakers. Practitioners have general clarity about their MRI goals alongside organizational support, or a strong personal commitment to their objectives.

WHY JOIN THE PRACTITIONERS PROGRAM?
Practitioners join a peer-to-peer community in which they can share knowledge, construct ideas, deepen best practices, and collaborate.

PRACTITIONERS PROGRAM GOALS
• To build a community of experienced practitioners in mission-related investing
• To increase the capacity of Confluence practitioners through technical assistance, peer-to-peer learning, and collaboration
• To accelerate the growth of mission-related investing by fostering systemic thinking, effective partnerships, and innovation within philanthropy

BENEFITS OF PRACTITIONERS MEMBERSHIP COMMUNITY
• Participation in a community of over 420 philanthropic grantmakers, public, private, community and family foundations, and donors
• Priority registration to the 20+ webinars and in-person events Confluence organizes each year
• Opportunity to be invited as a guest speaker for Confluence webinars or events
• Opportunity to join one of Confluence’s working groups or learning cohorts
• Authentic collaboration and influence among the thought leaders in the field of Impact Investing
• A pathway to leadership within Confluence, such as Board or Steering Committee participation
• Networking opportunities to serve as spokespersons for the field at Confluence co-sponsored events

• Ability to submit session and plenary topics for The Annual Practitioners Gathering select the final agenda content by a vote of the membership

RESOURCES
• One complimentary registration to the Annual Practitioners Gathering and membership pricing for additional representatives and family members
• Priority access to Confluence staffing and services
• Access to topical membership Listserves
• Membership discounts to investors’ events and consultant resources (when available)
• Individual technical assistance from Confluence’s CEO and other senior staff
• Access to a community of practice that shares costs in building and maintaining collaborative funds
• Access to the exclusive Membership Library, featuring over 250 hand-picked publications, resource guides, Confluence webinar recordings and PowerPoint presentations

BECOME A MEMBER OF THE PRACTITIONERS’ PROGRAM!
Participation in the Practitioners’ Program is based on a sliding scale by organizational asset size. Foundations and individual donors are welcome to apply for membership by contacting
• CEO, Dana Lanza dana@confluencephilanthropy.org
• COO, Roger Miller roger@confluencephilanthropy.org
JOIN THE CONFLUENCE PHILANTHROPY LEADERSHIP!

Are you excited about the idea of building the field or mission-related investing? Would you like to expand your network to include more colleagues who are like minded about philanthropy? Consider joining one of Confluence’s leadership committees.

Confluence members represent a diversity of institutions, personal and professional roles, and programmatic missions, but they all share a commitment to a vision of mission-aligned philanthropy. From our annual conference, to webinars and trainings, to working groups focused on specific areas of investment and change strategies, Confluence’s programs translate learning and connection into concrete action.

The Confluence Board of Directors is currently recruiting members for the following leadership committees:

• Board of Directors – Open to Grantmakers only
• New Orleans 2017 Conference Committee – Open to Grantmakers only
• Membership Committee – Open to Advisors and Grantmakers
• Finance and Fundraising Committee – Open to Advisors and Grantmakers

Would you like to recommend yourself or a colleague to serve and help us to lead Confluence into the future? If so, please let us know!

CONFERENCE COMMITTEE
Conference Committee members assist in designing plenaries, selecting speakers, and conducting outreach. Each Committee Member identifies a component of the conference that they would like to help with, and assists in stewardship. This is a great way to become more involved with Confluence while meeting peers in the mission-related investing community. The March 2017 conference will be held in New Orleans.

MEMBERSHIP COMMITTEE
The Membership Committee advises the Board of Directors in outreach, cultivation and review of membership applications from un-endowed foundations, individual donors, and applicants to the Advisors Membership category. The Committee meets 3 times annually by phone as a group and collaborates strategically with the Confluence CEO throughout the year. Funders and Advisors who are Members in good standing are eligible to serve on the Committee.

BOARD OF DIRECTORS
By providing vision, leadership, and accountability, the Board of Directors plays a vital role in ensuring that Confluence continues to produce programs and services that meet the needs of its members and builds the field of mission-related investing. The Board works closely with Confluence’s CEO and staff to ensure the operational impact and financial integrity of the organization. Board members may serve two, three-year terms. Confluence Board Service comes with significant rewards. Board members have the opportunity to:

• Broaden their range of awareness and knowledge of the field of mission-related investing
• Provide valuable service to help strengthen and broaden the impact of Confluence Philanthropy’s programs
• Assist in building the field of mission-related investing by developing strategic initiatives and taking on leadership roles to further communication and collaboration
• Develop beneficial and enjoyable relationships with philanthropic peers outside of their own programmatic and geographic scope
• Participation on the Board of Directors is currently only open to Funders whom are Members in good standing. To learn more about joining the Board of Directors please feel free to contact any current Board Members, or Dana Lanza, our CEO.

FINANCE AND FUNDRAISING COMMITTEE
The Finance and Fundraising Committee handles fiscal management and fundraising at Confluence. The Committee meets three times a year and assists in setting strategy for fundraising and special requests.
INTRODUCTION TO IMPACT INVESTING INTENSIVE  
TUESDAY, MARCH 8, 2016 & WEDNESDAY, MARCH 9, 2016
This year’s intensive is taught by Patricia Farrar-Rivas, CEO, Veris Wealth Partners, and Jeff Scheer, Senior Client Advisor, Pathstone Federal Street

DAY ONE OF THE INTENSIVE, MARCH 8
1:00 PM - AGASSIZ  
Welcome Address  
Dana Lanza, CEO, Confluence Philanthropy and Jennifer Murtie, CEO, Pathstone Federal Street

1:15 PM - AGASSIZ  
Group Introductions  
Through interactive exercises and individual sharing, participants will get to know one another and form a learning cohort that will carry us through the conference.

2:00 PM - AGASSIZ  
A Brief History of Social Investing  
While the practice of social investing is by no means new, it has experienced significant growth in recent years. In this session we will learn about the history and evolution of social investing, navigate the jargon (such as ESG, SRI, MRI or Impact), and discuss the nuances between different practices. This will create groundwork for participants to clarify the types of investment strategies and tools that they might like to use.

3:00 PM  
Break

3:15 PM - AGASSIZ  
Fiduciary Duty and The Role of the Trustee  
A long-standing belief holds that the notion of fiduciary duty is an obstacle to mission-related investing. However, recent IRS guidance has provided a path for fiduciaries to better align investment portfolios with charitable purposes. In this session we will discuss what it means to be a steward of philanthropic assets, how to interpret the IRS code, and how to work with your investment team to design policy statements that work for everyone.

4:00 PM - AGASSIZ  
Accountability or Disruption? What’s Your Theory of Change?  
Responsible investing strategies are based upon tools that hold corporations accountable and encourage best practices across an enterprise. Impact investing, on the other hand, tends to focus on disrupting the status quo by creating place-based social enterprises and game-changing new companies. Moreover, impact investing includes new products and services in existing companies, such as publicly traded companies like Tesla. While there is no one correct way to play in the field, understanding your options is the first step to getting in the game. In this session we will explore these strategies in depth through deep discussion and hopefully help you to begin to craft your own personal theory of change through investing.

5:00 PM  
Break

6:30 PM - RIALTO RESTAURANT  
Dinner with Donors  
A private dinner with veteran impact investors from the donor community offers a time to learn and share with new friends and peers.

DAY TWO OF THE INTENSIVE, MARCH 9
9:00 AM - COMSTOCK  
The Cohort joins the “Basic” Conference Track throughout the morning accompanied by workshop trainers Jeff Scheer and Patricia Farrar-Rivas

12:30PM - COMSTOCK  
Lunch  
The Cohort is encouraged to mix and mingle during lunch with Basic Track attendees

1:45 PM - COMSTOCK  
After lunch, Cohort members may choose between small session offerings

4:45 PM - COMSTOCK  
Bringing It All Together: Cohort Conclusion  
Cohort members meet one final time as a group for discussion and sharing with the trainers and Dana Lanza, CEO, Confluence Philanthropy

Democracy must be built through open societies that share information. When there is information, there is enlightenment. When there is debate, there are solutions. When there is no sharing of power, no rule of law, no accountability, there is abuse, corruption, subjugation and indignation.

- ATIFETE JAHJAGA
AGENDA
BASIC MEMBERS TRACK
WEDNESDAY, MARCH 9TH, 2016
7:30AM - COMSTOCK
Breakfast
9:00AM - COMSTOCK
Introduction to Structures in Mission-Related Investing
What does a mission-related investment program look like? This session will explore steps investors take to design and implement mission-aligned portfolios. Beginning with investment policy statement development and then diving into the various investment structures available across different asset classes, we will take a comprehensive look at the portfolio construction process for mission-related investors and how MRI can be customized to make sense for you.

Speakers:
Stephanie Cohn Rupp, Managing Director of Impact Investing, Threshold Group
Patricia Farrar-Rivas, CEO, Veris Wealth Partners

10:15AM
Break

10:30AM - COMSTOCK
Thematic Investing: Solution-Oriented Public Equity Investments
This panel will explore the opportunities and challenges that investing in public equities represents as an integral part of any MRI strategy. Panelists will discuss due-diligence through the lens of Environmental Social Governance (ESG), and the ultimate impacts on society and long-term financial returns that solutions-oriented public equity companies can provide. Importantly, public equities can provide scalable solutions, especially in the areas of water, energy and food, given their central roles in a variety of sustainability challenges. The panel will explore different approaches to thematic investing from several different entities, and will include the role of family offices in pursuing holistic and sustainable long-term strategies through thematic investing.

Speakers:
Rolando Morillo, Senior Equity Analyst, Rockefeller & Co
Raul Pomares, Founder, Sonen Capital
Mark Spalding, President, The Ocean Foundation

11:30AM
Break

12:30PM - COMSTOCK
Lunch
SMALL SESSIONS (CHOOSE ONE)

1:45PM - KENNEDY
Break Down Silos and Maximize Impact: Investing Across Financial Resources Via Intermediaries
Mission-related investors have both the opportunity and the ability to play a catalytic role in the Impact Investing space by utilizing different types of capital to enhance social and environmental outcomes. In fact, utilizing funds across the capital spectrum is critical in developing and proving financial solutions to problems that persist in broken markets. What is possible when philanthropic resources and investment strategies across asset classes are integrated? How can co-investment become more feasible and strategic? What role can and do intermediaries play? Panelists representing both the intermediary and investor perspectives will discuss the successes and challenges they experienced in establishing and participating in innovative funding partnerships. This includes pooled financing vehicles and pioneering grantmaking models that challenge traditional barriers in philanthropy and combine more than one type of capital to support holistic impact.

Speakers:
Rachel Serotta, Investor Relations Officer, Root Capital (Moderator)
Catherine Covington, Client Development Manager, RSF Social Finance
Deborah Frieze, Managing Partner, Boston Impact Initiative
Maya Winkelstein, Executive Director, Open Road Alliance

1:45PM - COMSTOCK
Mission Aligned Investing - Actual Implementation
A panel of investment professionals will provide actual portfolio examples illustrating specific implementation of a range of client objectives. The session is designed to provide very concrete and actionable illustrations to attendees and examples will include both simple and complex portfolios and a range of mission objectives. The session will also include presentations from investment professionals so that attendees hear a diverse set of views.

Speakers:
Matthew W. Patsky, CEO, Trillium Asset Management (Moderator)
George Bachrach, President, The Environmental League of Massachusetts
Andree Saulnier, Chair of the Investment Committee, Episcopal City Mission
Fran Seegull, Chief Investment Officer and Managing Director, ImpactAssets

3:15PM - KENNEDY
Navigating the Advisory Landscape: Finding the Investment Professional That's Right for You
The business of investing can be opaque to say the least. The various roles investment professionals play, the way professionals get compensated, and the nuances in the Impact Investing world create a “black box” approach for most. The session will include an overview of how the investment industry is structured from Advisors featured in Confluence Philanthropy’s new resource, “Finding Your Way to the Right Investment Advisor”. At the end of this session you will know the difference between asset manager, asset owner, wealth advisor, wealth manager, consultant, multi-family office, investment banker, fund manager and many more. You will understand the different ways these functions get compensated and the tradeoffs between different models of compensation.

Speakers:
Michael Wachtel, Co-Founder & Managing Partner, Big Path Capital (Moderator)
Natasha Lamb, Director of Equity Research and Shareholder Engagement, Arjuna Capital
David Lynch, President, Athena Capital
Kate Simpson, Research Consultant, Confluence Philanthropy
Chitra Staley, Managing Director and Partner, Beacon Pointe Wealth Advisors

3:15PM - COMSTOCK
To Own What You Own - Know What You Own
Democratizing finance means taking responsibility for what you own—“owning what you own.” That starts with knowing what you own. This session provides training on As You Sow’s new online tool that enables you to see the fossil fuel holdings hidden inside the mutual funds that make up your 401k or 403b employer-run retirement plan. Bring your list of mutual funds, and leave empowered by your own definition of “fossil free.” You’ll gain the ability to clean up and align your retirement plan as well as practical knowledge, training, and tools so you can own what you own by knowing what you own.

Speakers:
Andy Behar, CEO, As You Sow
Lisa Renstrom, Trustee, Bonwood Social Investments, Confluence Board Member

3:00PM BREAK

4:45PM - KENNEDY
Divest-Invest Working Group
Foundations can amplify their impact on climate change by using the power of their portfolios synchronized with their grantmaking. This panel will look beyond the Paris U.N. Climate Summit to the 2016 election and how the Divest-Invest movement is building into a political force bringing “power to the people” in more ways than one. We will bring you up to date on Divest-Invest strategies and discuss PRI/MRI projects bringing clean and just power to people who lack access to energy. We will debate the marriage of Divest and Engage and the need for fossil fuel companies to stop capital expenditures. The session will inform and inspire and help you understand your critical role in bringing about a just and clean energy present and future.
4:45PM - COMSTOCK
Place-Based Initiatives
A new generation of collaborative economics requires sources of capital that connect with communities at the regional level. While there are many historical and deeply embedded barriers to this work, a growing field of entrepreneurs, investors, philanthropists and public officials are willing to tackle this challenge head-on. This session will explore specific examples of this new multi-stakeholder paradigm through the work of several regional initiatives. Panelists will highlight the challenges, lessons learned, and opportunities to expand on this work in other regions.

Speakers:
David Sand, Chief Investment Strategist, Community Capital Management (Moderator)
Angel Braestrup, Executive Director, The Curtis & Edith Munson Foundation
Sayer Jones, Director of Finance and Mission-Related Investing, Meyer Memorial Trust
Nicholas Mang, Executive Director, Jessica’s Love Foundation

6:00PM
Philanthropists-Only Reception at Henrietta’s Table, The Charles Hotel

7:00PM
Philanthropists-Only Dinner at Henrietta’s Table, The Charles Hotel

MEMBERS DAY WITH GUESTS
THURSDAY, MARCH 10TH, 2016

7:00AM
General Breakfast and Ad Hoc Discussions - Ballroom
Special Breakfast Meeting: Sustainable Fisheries - Rogers
Sponsored by CEI
Coastal Enterprises, Inc (CEI) is pleased to host a Confluence breakfast to discuss how socially motivated funders and investors can build healthy food systems locally, regionally and nationally, with a focus on fisheries and fisheries-related opportunities. We will discuss the dynamic interaction between lending and investment, sector-based business development services, and the importance of public policy to building healthy food systems in the context of climate change and shifting demographics.

8:30AM - BALLROOM
Welcome with Jon Jensen, Executive Director, Park Foundation, and Jeff Rosen, Chief Financial Officer, Solidago Foundation, and Confluence Board Member

9:00AM - BALLROOM
Member’s Keynote With Mitchell Kapor, Partner, Kapor Center For Social Impact
Mitchell Kapor, a pioneer of the personal computer industry, has been at the forefront of information technology for more than 30 years as an entrepreneur, software designer, and investor. He is best known as founder of Lotus Development Corporation and the designer of Lotus 1-2-3, the “killer application” which made the personal computer ubiquitous in the business world in the 1980s.

10:00AM
Break

10:15AM - BALLROOM
Plenary: The Influence of Money in Democracy
The influence of money in the American political system has become a question of increasing concern, some would say one that threatens the basic fabric of our democracy. In fact, a groundbreaking 2014 study by Princeton University states that the U.S. government now represents the rich and powerful, not the average citizen — effectively making America an oligarchy, not a democracy or republic. Researchers concluded that that economic elites and organized groups representing business interests have a substantial impact on U.S. government policy, while mass-based interest groups and average citizens have little or no influence. Broad-based social movements have reacted to this imbalance of power, and have made significant inroads in raising citizens’ awareness. In this opening plenary, we’ll hear from some of the voices supporting a true democracy.

Special Address:
Dennis Kucinich, Former Congressman

Speakers:
Dorian Warren, Fellow, Roosevelt Institute (Moderator)
Daniel Cantor, National Director, Working Families
Lisa Gilbert, Congress Watch Director, Public Citizen
Heather McGhee, President, Demos

11:45AM - BALLROOM
Community Reflections
Join us to learn from and appreciate Confluence Members’ reflections on the field in an open forum sharing session.

Facilitators:
Dana Lanza, CEO, Confluence Philanthropy
Lisa Renstrom, Trustee, Bonwood Social Investments, Confluence Board Member
12:15PM - REGATTABAR
Lunch

1:30PM - ROGERS
Eliminating Extreme Poverty: The Business Case for Meeting the UN’s Sustainable Development Goals
More than 500 million people are too poor to think about anything other than finding food and shelter. For this population, microfinance and financial literacy have proven insufficient to lift them out of extreme poverty. BRAC, a leading microfinance organization, pioneered the graduation approach, a program that helps the very poorest families create a sustainable source of income and gain the confidence and skills they need to take the next steps. It boasts a 95% success rate in Bangladesh and was tested in eight pilot countries by other organizations. By using examples from BRAC’s pioneering work in Bangladesh, and the development of the Uplift platform, more than one million women and children are targeted to overcome extreme poverty in 20 countries over the next five years. This session shares the BRAC story, as well as those from other regions, to inspire listeners to take on one of the toughest issues facing poverty alleviation today while expanding the market for micro-banking.

Speakers:
- Allison Duncan, Founder & CEO, Amplifier Strategies (Moderator)
- Anne Hastings, Manager, Microfinance CEO Working Group
- Syed M Hashemi, Senior Advisor, Graduating the Poor Initiative, CGAP
- The World Bank
- Sadna Samaranayake, Project Director, Ultra Poor Graduation Programme, BRAC USA

1:30PM - STRATTON
Getting Impact Capital to the Grassroots
While many have identified the social and environmental benefits of reinvesting resources to spur the revitalization of just, local economies, early stage experiments in connecting impact investments are relatively few and still require various layers of philanthropic support. On a national level, we are seeing the emergence of strategies that target place-based, system-scale solutions focusing on (1) workplace structures that narrow income inequality; (2) enterprises that build local resilience; (3) ownership structures where return on investment will primarily stay within the local community; and (4) supporting investments that build political power in disadvantaged communities to advocate for systemic change. This panel will discuss systematic divestment from a global to a more local economy requiring grantmaking, PRI and MRI investments, and creating a long-term commitment between philanthropic partners and those in the field. Please bring your own stories to share.

Speakers:
- Jeff Rosen, Chief Financial Officer, Solidago Foundation (Moderator)
- Jenny Kassan, Owner, Jenny Kassan Consulting
- Cara Matteliano, Vice President, Community Impact, Community Foundation for Greater Buffalo
- Alex Saingchin, Program Officer, Common Counsel Foundation
- Alexie M. Torres-Fleming, Executive Director, Access Strategies Fund

1:30PM - COMPTON
Investing in a Clean Energy Economy for All
Activists in rural, urban and Native American communities are mobilizing to fight the pollution created by fossil fuel industries in their neighborhoods and ensure they have access to affordable clean energy. But they lack access to financing needed to succeed in these efforts. Experience has shown that the growing clean energy economy can help communities that have been left behind by systemic economic and racial inequality, but only if we direct investments toward economically distressed communities and incorporate higher-wage jobs, strong labor, local hire, and domestic manufacturing standards. Investors have an opportunity to contribute to a just transition to a clean energy economy and economic transformation for these low-income and communities of color. The panel will discuss challenges, solutions and strategies for investors to successfully support all communities through investments in clean energy.

Speakers:
- Geeta Aiyer, Board Member, Sierra Club Foundation (Moderator)
- Donnel Baird, Founder & CEO, BlocPower
- Donna House, Ethnocultural Botanist
- Raoul Slavin, Managing Director, Treehouse Investments, LLC

1:30PM - AGASSIZ
Local Food System Investing in the U.S.
Farmers and their food production sustain us, yet the U.S. industrial farm system is not sustainable nor is it achieving positive health, environmental or social outcomes. How can investments and philanthropy transform this sector? We will hear from leaders working on the front lines of investing in a new generation of small- and mid-sized organic farms and processing and distribution businesses. They will discuss the state of local food investing through data collected by Slow Money in their State of the Sector Report. The report analyzes five years of investing (2009–2013) and covers $293 million of investment in 968 food and agriculture deals. The panel will tackle these questions: Which investments achieve predictable, risk-adjusted rates of return? What are the opportunities and constraints to investing in transforming the food sector? How are philanthropic dollars playing a role? How do time and return expectations figure into risk analysis?

Speakers:
- Jennifer Astone, Executive Director, Swift Foundation (Moderator)
- Michael Bartner, Vice President, Slow Money
- Esther Park, CEO, Cienega Capital
- Don Shaffer, President & CEO, RSF Social Finance

1:30PM - BALLROOM
Looking Beyond Next Quarter, Changing Our Thinking About Timelines and Return
Sustainability is inherently a long-term proposition, but today’s markets are myopic. Investors and corporate management teams gravitate towards short-term results. Investments are often structured with defined lives, limiting the ability of investors and entrepreneurs to look towards the horizon. Are current systems properly structured to support sustainability-oriented capital markets? This session will look at the state of our capital markets, highlighting the importance of long-term strategies. We will explore the idea of shifting investor focus from quarterly returns to sustainable, long-term solutions, and whether current investment structures can appropriately address the alignment of mission between investors and entrepreneurs. To create a durable and equitable financial system, we must shift the conversation to long-term factors which will better facilitate sustainable, lasting impact.
7:30PM
General Dinner - Ballroom
Special Dinner: Inside/Outside Strategies to Keep It In the Ground - Rogers - Register in the Advance
Sponsored by As You Sow Foundation
How can an armada of Kayaktivists work strategically on the outside to strengthen the hand of investors who are at the center of the Divest/Invest Movement? This panel will explore how Kayaktion and other creative peaceful tactics can be real game changers in keeping fossil fuels safely in the ground, by challenging oil, gas, and coal's infrastructure on the waterways where they have operated with impunity for far too long.
By harnessing the power of the market while simultaneously punishing the bad corporate actors that are holding our planet back we can speed the just transition to a clean energy future and stable climate for our kids.

Special Dinner: Moving Capital Markets to Account for a Sustainable Future — A Dinner Conversation with the Sustainability Accounting Standards Board (SASB) - Stratton - Register in the Advance
Please join Jean Rogers, founder and CEO of the Sustainability Accounting Standards Board, and Bob Eccles, the founding Chairman of SASB, professor at Harvard University and Chairman of Arabesque Partners discuss the ideas and people behind the origin of SASB, and what it takes to move the capital markets to account for a sustainable future. Kat Taylor, Co-Founder & CEO of Beneficial State Bank will provide a welcome and introduction.

9:00 PM – 11:00 PM - BALLROOM
American Bandstand Dance Party and Networking Event
Can you do The Twist? The Mashed Potato? How about the Cabbage Patch? Join the crowd for a networking event and a chance to stretch your legs while gettin’ down - Ballroom. Our live DJ will be pumping your favorite oldies from the 50s onwards. Festive/period appropriate attire encouraged, but no one with a suit will be turned away at the door!
Desserts and adult beverages will be served
ADVISORS DAY
FRIDAY, MARCH 11TH, 2016,

7:00AM - REGATTABAR
General Breakfast and Ad-Hoc Discussions - Ballroom
Special Breakfast: Investing in Water Sustainability - Compton
Sponsored by Water Investors Working Group

Please join our Water Investors Working Group and steering committee chair, Jon Scott (President, Singing Field Foundation), for conversation about challenges and opportunities related to “sustainable water investment.” Our informal breakfast discussion will preview Working Group plans for the coming year, and invites participants to share questions and experiences on: a) how mission-driven investors view and respond to concerns about privatization and/or commodification of natural resources and public services in the water sector, b) examples of promising or problematic “sustainable water” investments you have made or are considering.

8:45 AM - BALLROOM
Welcome Address with Gerry Watson, Vice President For Finance and Operations, Rockefeller Brothers Fund, Confluence Board Chair

9:00 AM - BALLROOM
Plenary: Investors Reflections with The Rockefeller Brothers Fund
The Rockefeller Brothers Fund’s watershed announcement that it would divest from fossil fuels brought broad attention to the urgency of climate change and the practice of aligning an institution’s investments with its mission. In this session we will join members of The Rockefeller Brothers Fund and their investment team as they reflect upon their journey over the past few years, from an endowment entrenched in conventional management practices to true visionaries in the field of Impact Investing. They will cover successes and challenges, lessons learned, surprises, and advice for other investors. The session will be interactive with plenty of time for audience engagement.

Speakers:
Dana Lanza, CEO, Confluence Philanthropy (Moderator)
Adam Wolfensohn, Investment Committee Member, Rockefeller Brothers Fund
Stephen Heintz, President, Rockefeller Brothers Fund
Valerie Rockefeller Wayne, Trustee, Rockefeller Brothers Fund
Christie Zarkovich, Director, Perella Weinberg Partners

10:15AM
Break

10:30AM - BALLROOM
Advisors Keynote with U.S. Senator Elizabeth Warren
Senator Warren is a fearless consumer advocate who has made her life’s work the fight for middle class families. The Boston Globe has called her “the plainspoken voice of people getting crushed by so many predatory lenders and under regulated banks.” President Obama asked her to set up the new agency to hold Wall Street banks and other financial institutions accountable, and to protect consumers from financial tricks and traps often hidden in mortgages, credit cards and other financial products.

11:30AM
Break

11:45AM - ROGERS
Are There Solutions to Gentrification? Building Prosperity from the Community Up
Economic growth in working class neighborhoods doesn’t always mean that residents have to be displaced. Using innovative examples from foundation initiatives to private capital, this session will explore efforts to sustain economic growth of neighborhoods without displacing residents. These examples can serve as powerful tool for thinking about investing in ways that stabilize communities, creates jobs and provides returns.

Speakers:
Shawn Ginwright, Trustee, The California Endowment (Moderator)
Maria Mulqueen, Program Officer, Affordable Housing, Hyams Foundation
Lisa Owens Pinto, Executive Director, City Life /Vida Urbana
Mark Reed, Founder and Manager, Contact Fund LLC

11:45AM - STRATTON
Investing in Gender Equality
Investing in the welfare of women and girls reap positive returns for their health and well-being and that of society. It is both an economic and moral imperative – economic because social and financial outlays that raise the status and living conditions of women and girls have tremendous multiplier effects for the economy; and it’s a moral imperative because despite progress on some fronts, the fact remains that women endure various forms of discrimination, harassment, violence, marginalization and exclusion across the globe. Gender inequality is one of the great human rights issue of our time. What can investors and funders do to address barriers and expand opportunities for women? This panel will provide examples from the US and abroad of investment opportunities and grant-supported initiatives that support women’s empowerment.

Speakers:
Lisa Hayles, Institutional Investment Services, Boston Common Asset Management (Moderator)
Suzanne Biegel, Catalyst at Large, and Chief Catalyst, Women Effect
Mara Bolis, Deputy Director, Private Sector Development, Oxfam International
Maria Jobin-Leeds, Founder and Managing Partner, Jobin-Leeds Partnership for Democracy and Education

11:45AM - CONANT - BALLROOM
Managing for Impact: Metrics 2.0 to Strengthen Our Practice
“What gets measured gets managed” – but only if real intentional-ity is applied. A new approach, prioritizing management through measurement, is emerging as a way to drive more impact. How can we measure impact within a framework and approach that ensures continued improvement? What is the responsibility of the investor in supporting their investees? In this panel you’ll hear from PI Investments on their impact approach, alongside two investees – Gawa Capital and Huntington Capital – who have developed and implemented practices to increase impact over time. They will provide specific, practical advice from their respective work in microfinance and financial inclusion, and job creation in low-income communities, while exploring how this approach can be applied to other high-impact sectors.

Speakers:
Morgan Simon, Senior Advisor, PI Investments (Moderator)
Hope Mago, Principal, HCAP Partners
Luca Torre, Co-Founder and Co-CEO, Gawa Capital
AGENDA

11:45AM - AGASSIZ
Our Democracy in Peril: Social Impact Opportunities in Prison Reform
The incarceration of 2.2 million people, 50% of them for non-violent offenses, is an assault on democracy itself. For those with a prison record, annual earnings are reduced by 30-40%. Racial and ethnic disparities are pervasive in the prison system, with one of every nine black males in his 30s incarcerated on any given day. Patterns of human rights abuse are prevalent as jails are not properly staffed. Many small rural towns don’t have the appropriate resources to support incarceration facilities. Many companies benefit from prison labor, including some household names. Prison reform is an issue that Democrats and Republicans now agree on and there is a new movement to improve the prison system. How can impact investors participate?

Speakers:
Catherine Chen, Senior Vice President, RBC Wealth Management (Moderator)
Charles Fields, Chair, Edward Hazen Foundation
Sonia Kowal, Director of Socially Responsible Investing, Zevin Asset Management
Marc Mauer, Executive Director, The Sentencing Project

11:45AM - COMPTON
The Combined Force of Philanthropy and Impact Investing in Accelerating Water Investment
The need for resilience in our nation’s water systems is becoming ever more urgent as insufficiencies in water management practices and infrastructure are magnified by the extremes of climate change. Investment is needed in a wide array of areas that impact water systems resilience, many of which necessitate action and partnership between investors, philanthropies, public entities, companies, and innovators. This session will explore the role philanthropy can play in stimulating water-related investments, recognizing the need for immediate solutions alongside the goal of long-term systemic transformation.

Speakers:
Margaret Bowman, Consultant, Walton Family Foundation & Water Funder Initiative
Peter W. Culp, Partner, Squire Patton Boggs
Lauren Ferstanding, Director of Product Development, NatureVest
Francesca Vietor, Program Director, Environment, Public Policy, and Civic Engagement, The San Francisco Foundation

11:45AM - LOWELL - BALLROOM
Tales From The Fire: Lessons From Clean Tech
Each year we select a critical mission-related sector that needs change. This year we’re focusing on the collapse and subsequent revival and evolution of the clean tech industry where from 2001-2014 investors generally lost money as innovators failed to thrive. The few winners, such as Tesla and Solar City, have yet to show they can be profitable and thus durable. Clean tech early-stage investment has all but disappeared, frustrating the very innovation needed for a better world. Join us for a reflection and discussion with experts, to explore strategies for impact investing to catalyze a future where everyone wins.

Speakers:
Tom Cain, CEO & Co-Founder, GSV Sustainability Partners (Moderator)
Temple Fennell, Private Markets Consultant, Flagship Ventures
Ben Gaddy, Director of Technology Development, Clean Energy Trust
Silda Wall Spitzer, Director & Principal, NewWorld Capital Group

1:00PM - REGATTABAR
Lunch - Ballroom

2:00PM
Confluence Practitioner’s Gathering Ends
If you plan to stay for the afternoon Climate Summit, please pick up your program guide at the registration desk.

Deliberation and debate is the way you stir the soul of our democracy.

- JESSE JACKSON
GEETA AIYER
Board Member, Sierra Club Foundation
Geeta has over 25 years of experience in finance with passion for the environment and social justice. Under Geeta’s leadership, Boston Common has built a strong investment record and substantially improved the policies and practices of portfolio companies through shareholder engagement since the firm’s inception in 2003. Geeta’s prior work experience includes positions at United States Trust Company (Boston), Cambridge Associates, Inc., and in rural development/ and public administration in India. She founded Walden Capital Management (1994), as well as a non-profit, Direct Action for Women Now (DAWN) Worldwide. Geeta was honored with the Joan Bavaria Award (2015) for Building Sustainability into the Capital Markets and the SRI Service Award (2013), recognizing leadership and innovation in SRI (Sustainable, Responsible, Impact) investing. Geeta serves on the U.N.-supported PRI Association Board and the Board of Directors of the Sierra Club Foundation, Earthworks, and YW Boston. She received her MBA from Harvard University and her BA (Hons) and MA degrees from the University of Delhi, India.

JEN ASTONE
Executive Director, Swift Foundation
Jen Astone joined the Swift Foundation in 2011. Swift provides grants and investment capital to promote cultural and biological diversity, with a focus on land stewardship and agroecology. Swift funds organizations focused on indigenous and local communities involved in advocating for land and resource rights, traditional knowledge systems, and alternative economic models. Jen leads Swift’s work with two donor collaboratives: the AgroEcolology Fund and the Global Alliance for the Future of Food. She also supports Swift’s initiatives in Northwest British Columbia and in the Andes-Amazon regions of Colombia, Ecuador and Peru. Prior to Swift, Jen served as Executive Director of the Firelight Foundation and as Africa Program Officer, Global Fund for Women. She has advocated for international grassroots funding and earned her Ph.D. in cultural anthropology with fieldwork on women’s home gardens in Guinea, West Africa.

GEORGE BACHRACH
President, The Environmental League of Massachusetts
George is an attorney and former state senator. He served three terms in the Massachusetts Senate in the 1980s and has run for U.S. Congress with the endorsement of The Boston Globe, organized labor, and civic groups. After leaving the state senate, George practiced law for nearly a decade as a partner with the Boston law firm Brown, Rudnick, Freed and Gesmer. George regularly provides political commentary for Boston-area media, including New England Cable News (NECN), WGBH-TV, The Boston Globe, and other outlets. He has taught journalism at Boston University. George is a graduate of Trinity College and Boston University School of Law. He lives in Watertown with his wife and two sons.

DONNEL BAIRD
Founder, BlocPower
Donnel Baird is the founder of BlocPower, a startup that markets, finances and installs solar and energy efficiency technology to help houses of worship, non-profits, small businesses and multifamily projects to slash their energy costs. Donnel spent three years as a community organizer in Brooklyn and one year as a voter contact director at Obama for America. He managed a national Change to Win/ULINA campaign to leverage U.S. Dept. of Energy energy efficiency financing to create green construction jobs for the unemployed. He partnered with the Washington Interfaith Network to generate a $100 million government investment in underserved communities in the District of Columbia. Donnel graduated with High Distinction from Duke University and received an MBA from Columbia Business School, where he was a Board of Overseers Fellow. Donnel is a recipient of Echoing Green, Poptech, and Bluhm Helfand fellowships. BlocPower is backed by Andreessen Horowitz and Kapoor Capital, and has a contract with the DoE to connect investors to portfolios of energy efficiency and clean energy projects in American cities.

MICHAEL BARTNER
Vice President, Slow Money
Michael Bartner is a Vice President at Slow Money. Since 2010, dozens of local Slow Money networks and investment clubs have catalyzed the flow of $45 million into 450 local and organic food enterprises in the U.S., Canada and France. Michael is former Associate Director of Investor’s Circle (IC), one of the oldest angel networks in the country and the only one dedicated to sustainability; since 1992, IC members have invested more than $200 million in early stage ventures. Michael previously worked with the Carter Center’s Global Development Initiative, Sustainability in London, and Park Pride in Atlanta where he taught urban gardening to underprivileged children. Michael has a B.A. in Environmental Science and Political Science from Emory University and the London School of Economics. He has an M.B.A. from Northeastern University. He lives here in York, Maine with his wife and two daughters, Scarlet (3) and Opal (1).

ANDREW BEHAR
CEO, As You Sow
Andrew Behar, As You Sow CEO, has 30 years of experience as a senior executive and strategist in the clean-tech, communications, and life science sectors. Prior to joining As You Sow, Andrew founded and served as CEO of a clean-tech start-up developing innovative fuel cell technologies. He served as COO for a social media agency focused on sustainability and has been a strategic consultant in the nonprofit sector. He has founded and run start-ups in the medical device and communications areas and serves on the boards of several high-tech innovation companies. Andrew is also an elected board member of US-SIF, the Forum for Sustainable and Responsible Investment.

MOLLY BETOURNAY
ESG Research Analyst, Pathstone Federal Street
Molly joined Pathstone Federal Street (formerly Federal Street Advisors) in 2014 with over 10 years of experience working in the sustainable investing arena. Prior to joining Pathstone Federal Street, Molly was Head of U.S. Research for EIRIS, responsible for managing a team of seven research analysts specializing in ESG analytics for asset managers. She also served as Lead Sustainability Analyst for Pax World Funds, where she oversaw proxy voting and researched companies’ ESG profiles using quantitative and qualitative indicators to identify investment risk and opportunity.

SUZANNE BIEGEL
Catalyst at Large, and Chief Catalyst, Women Effect
Suzanne Biegel has been a long time angel investor member of Investors’ Circle and served as its CEO in 2010-2011. For the past ten years, Suzanne has had her own consulting practice, Catalyst at Large. She has brought her visionary leadership as an entrepreneur, a coach and mentor, a board member, a philanthropist, and an active angel investor to a variety of sustainability-driven projects. She is a frequent public speaker and moderator in the areas of impact investing, sustainability, responsible business, and philanthropy. Suzanne was one of the co-founders of the Patient Capital Collaborative, a collaborative angel fund of Investors’ Circle. Suzanne is a Catto Fellow at the Aspen Institute and an active member of other aligned networks, including Social Venture Network and Women Donors’ Network. A native New Yorker, Suzanne is now based in London, where she is helping to build a new impact angel network for ClearlySo. Suzanne holds degrees from the Wharton Business School and the Annenberg School of Communication.

MARA BOLIS
Senior Advisor, Private Sector Department, Oxfam America
Mara has over 15 years of experience working in the fields of international development, emerging markets finance and business. Mara is the global lead on the Women in Small Enterprise initiative, which includes Oxfam America’s first impact investing fund that focuses on women entrepreneurs in Latin America. Prior to Oxfam, Mara consulted for the Middle East Investment Initiative, a public-private partnership of the Aspen Institute, the Overseas Private Investment Corporation, and the Palestinian Investment
Fund, to develop a new form of small business insurance to help Palestinian exporters hindered by travel restrictions. Prior to that she worked at the Federal Reserve Bank of New York as an emerging markets financial sector analyst. She has worked with various international finance and development organizations, including US Export-Import Bank, the Overseas Private Investment Corporation and the World Bank. She has an MBA from Johns Hopkins University and a Masters in Foreign Service from Georgetown University. Mara speaks fluent Latvian and basic Russian.

ANGEL BRAESTRUP
Executive Director, The Curtis & Edith Munson Foundation
Angel is celebrating her 27th year with the Munson Foundation, having spent the last 22 years as executive director. The Munson Foundation invests in diverse strategies to align grantmaking with the needs of the community and with the funding gaps where solutions have been identified. She has overseen the development of funder collaborative projects in south Florida, Alabama, and the Chesapeake Bay region, among others. Her passions lie in connecting people, projects, and place—and in recognizing the extraordinary expertise of those who work on the myriad elements of what makes up a healthy, sustainable community. She serves on the board of The Ocean Foundation and the Norcross Wildlife Foundation, which she chairs. She is a past member of the governing bodies of the Consultative Group on Biological Diversity, the Marine Funders Working Group, the Center for Agricultural Partnerships, and the Chesapeake Bay Funders Network.

STEPHANIE COHN RUPP
Managing Director of Impact Investing, Threshold Group
Stephanie Cohn Rupp brings more than 15 years of experience in global SPEAKER BIOS (B-F) the healthcare, natural resources and technology sectors. During her tenure at J.P. Morgan, Catherine advised clients on over $5 billion worth of M&A, project finance and equity and fixed income underwriting transactions. She was based in the New York, San Francisco, and Hong Kong offices, and has expertise in advising multinational companies. Prior to that, she was an analyst in the International Banking Department of Chinatrust Commercial Bank in Taiwan, part of one of the largest conglomerates in Taiwan. She performed investment analysis for a variety of project finance transactions and assisted in the establishment of the firm’s Hong Kong office.

AUDREY CHOI
CEO, Morgan Stanley Institute for Sustainable Investing
Audrey Choi is CEO of Morgan Stanley’s Institute for Sustainable Investing. She is also Managing Director and Head of Morgan Stanley’s Global Sustainable Finance Group. In these roles, she oversees the firm’s efforts to support resilient communities and promote economic opportunity and global sustainability through the capital markets. In a career spanning the public, private and nonprofit sectors, Audrey has become a thought leader on how finance can be harnessed to address public policy challenges.

LESLE CHRISTIAN
Investment Advisor, Integrated Capital
Leslie Christian, a leader and innovator in social and environmental investing, is focused on the development of Integrated Capital, a framework for investing that accounts for the global risks of our time as well as the vision, values and aspirations of each client. Through Leslie E. Christian, LLC, Leslie offers consulting and advisory services to individuals and institutions seeking an integrated capital approach. She also serves as Integrated Capital Specialist at NorthStar Asset Management in Boston. She is a past Board member and treasurer for the Business Alliance for Local Living Economies (BALLE). Leslie joined Portfolio 21 Investments in 1995 and served as its President and CEO until 2012. She co-founded Portfolio 21, one of the first public-equity mutual funds focused on long-term ecological risks and opportunities, as well as Upstream 21, a uniquely-chartered regional holding company for socially and environmentally responsible businesses. Leslie also co-founded Women’s Equity Mutual Fund, which is now a part of Pax World.

Leslie is a graduate of the University of Washington and holds an MBA in Finance from the University of California at Berkeley. She lives in Seattle, WA with her spouse Heather Andersen.

PETER COFFIN
President, Breckinridge Capital Advisors
Peter Coffin is the founder and President of Breckinridge Capital Advisors, Inc., a Boston-based investment advisor managing over $21 billion in fixed income portfolios. Prior to founding Breckinridge, Peter was a Senior Vice President with Massachusetts Financial Services (MFS). At MFS, he managed municipal bond portfolios totaling over $2 billion and supervised the management of another $3 billion of investment-grade and high-yield municipal bond strategies. In addition, as a member of the MFS’s Fixed Income Policy Committee, Peter shared responsibility for the oversight of a range of taxable fixed income strategies for mutual fund and institutional client portfolios. Peter began his career as an analyst in the Bond and Money Market Group of the Connecticut National Bank. He then worked at Aetna’s Bond Investment Division as an investment analyst in both the Financial Guarantee and Corporate Public Bond Departments. Peter received a BA with honors in Classical Studies from Hamilton College in 1982 and is currently serving on the College’s Board of Trustees. He is also on the Board of The Forum for Sustainable and Responsible Investment (US SIF) and served a term on the Municipal Securities Rule Making Board (MSRB). Peter speaks regularly at conferences on topics related to the management of fixed income portfolios and his comments on the developments in the fixed income markets are regularly reported in numerous publications.

STEPHANIE COHN RUPP
Managing Director of Impact Investing, Threshold Group
Stephanie Cohn Rupp brings more than 15 years of experience in global
impact investing, impact fund design and implementation, and microfinance, as well as crowdfunding. Stephanie works closely with Chief Investment Officer, Ron Albahary, CFA, in developing creative goals-based solutions for clients who desire portfolios aligned with what matters most to them. Stephanie’s extensive experience spanning the global ecosystem of impact brings with it a multifaceted toolkit of skills in sourcing, evaluating, and measuring opportunities from both investment and impact perspectives. Most recently, Cohn Rupp served as CEO of Toniic, a global action community of impact investors, a member-informed global financial ecosystem which operates to create positive social and environmental impact. She led all aspects of strategy, growth and operations for the San Francisco-based organization. Cohn Rupp holds a B.Sc. in Politics and Philosophy from Bristol University, a M.Sc. in Comparative Government from the London School of Economics and an MPA from Harvard’s Kennedy School with a focus on Trade and Finance. She has served on the boards of international nonprofits, including Women Thrive Worldwide, and Latet USA, and two global investment funds.

Catherine Covington
Client Development Manager, RSF Social Finance

Catherine has worked at RSF Social Finance for almost 5 years, first managing the operations of RSF’s donor advised fund program and now as Client Development Manager. She is responsible for creating and implementing fund-raising strategies for RSF’s philanthropic and investment funds, managing RSF’s PRI Fund, engaging with current and prospective clients on a regular basis and actively participating in RSF’s field building work. Aside from a brief stint in public accounting, Catherine has spent her entire career in the philanthropic and financial services sector with the Woodruff & Whitehead Foundations and SunTrust Bank in Atlanta as well as the Tides Foundation in San Francisco. Outside of work, Catherine serves as the board chair of At The Crossroads, an organization serving homeless street youth in San Francisco. Originally from Georgia, she graduated from Georgia Tech with an undergraduate degree in business and currently lives with her husband Paul and cat in San Francisco.

Peter W. Culp
Partner, Squire Patton Boggs

Peter Culp is a partner in the Phoenix office of Squire Patton Boggs LLP, where he manages the firm’s Western water law and policy practice. Among other work, Peter has been closely involved in the development of policy solutions for the management of the Colorado River, including a series of domestic and international agreements over the past decade between and among the U.S. federal government, the Colorado River Basin states, major water users, and the government of Mexico. In connection with those efforts, Peter has been twice awarded the Partners in Conservation Award by the U.S. Department of Interior, as well as The Nature Conservancy of Arizona's 2013 Outstanding Conservation Achievement Award and the Arizona Capitol Times’ Leader of the Year Award in Public Policy. Peter is the author of many published articles and reports on water and other natural resource issues, including a recently-released report with Encourage Capital on water-related impact investment strategies, Liquid Assets: Investing for Impact in the Colorado River Basin.

Carol Dahl
Executive Director, The Lemelson Foundation

Carol Dahl is the Executive Director of the Lemelson Foundation and leads the Foundation’s work to use the power of invention to improve lives. The Foundation inspires and enables the next generation of inventors and invention-based enterprises to promote economic growth and address critical challenges in the U.S., and to help solve social and economic problems for the poorest populations in developing countries. The Foundation focuses on supporting impact inventing, targeting social impact, environmental responsibility and creation of products and businesses that are financially self-sustaining. Prior to joining the Lemelson Foundation in July 2011, Carol worked for the Bill & Melinda Gates Foundation in various roles, including founding Director of the Global Health Discovery. During her tenure at the Gates Foundation, Carol built the platform discovery innovation programs Grand Challenges in Global Health and Grand Challenges Explorations. Dahl received a bachelor’s degree from the University of Iowa, master’s and doctoral degrees from the University of Wisconsin-Madison and served on the faculty of the University of Pittsburgh.

Betsy Dietel
Senior Partner, Dietel Partners

Betsy is a Senior Partner with Dietel Partners, a family-owned philanthropic advisory firm that creates relationships of trust with and between donors, grantees, and fellow funders to empower people to advance justice in the world. Betsy has a combined career in nonprofit management, community organizing and fundraising, much of it focused on launching organizations that build community. She was the founding executive director of Lake County Community Foundation, The Chicago Community Trust’s first affiliate, and Conserve Lake County, an environmental advocacy organization. She and her husband were part of the senior management team that helped build Prairie Crossing in Grayslake, IL, the nation’s first conservation community. Her international experience includes living and working in rural Kenya and Panama. She is a trustee of the Pulitzer Center on Crisis Reporting, and is the Board Chair of the Child Care and Learning Center and Lyon Family Deer Island, LLC.

Allison Duncan
Founder & CEO, Amplifier Strategies

Allison created Amplifier Strategies to help philanthropists become more strategic and impactful. The firm offers a full range of philanthropic services, including program strategy and management along with impact investing. Allison is responsible for the firm’s overall strategic direction. She also provides account management services for some of the firm’s leading clients, including (past and present) the Bill and Melinda Gates Foundation, Arcus Foundation, Barefoot College, Environmental Defense Fund, Erol Foundation, Libra Foundation, The Nature Conservancy, Swift Foundation, and many others. Allison began her philanthropic career at the Gordon and Betty Moore Foundation as Director of Program Finance, creating the practice to perform due diligence, measure progress towards initiative outcomes, and structure grants and program-related investments to strengthen the capacity of grantees organizations. Prior to joining the Moore Foundation, Allison was a manager at Deloitte, where she worked in the Carolinas, Russia, New York and Silicon Valley.

Patricia Farrar-Rivas
Founding Principal and CEO, Veris Wealth Partners

Patricia Farrar-Rivas is a founding principal and CEO of Veris Wealth Partners, a wealth management firm committed to aligning wealth with values. She has provided investment advisory and wealth management services since 1992. Prior to Veris, Patricia led the effort by Silicon Valley-based public accounting firm, Frank, Rimerman + Co. to launch its new investment advisory subsidiary. She also co-founded the New York office of Progressive Asset Management in 1994. Patricia served on the board of As You Sow, a nonprofit organization promoting corporate responsibility through shareholder advocacy and innovative legal strategies. Patricia is a principal consultant to the Envestnet Sustainability Platform and a member of the Envestnet Advisory Board. She is also a member of the Standards Council for the Sustainability Accounting Standards Board (SASB), a nonprofit that works on developing and disseminating industry-specific sustainability accounting standards for material, nonfinancial (ESG) information. Patricia is based in San Francisco, where she lives with her family.

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impact investment strategy. Key freshwater strategies include: the development of funds that invest in water rights with the dual purpose of generating financial and environmental returns. The Conservancy’s first impact capital fund in the water rights space was launched in Australia in December 2015. Prior to her time at the Conservancy, Lauren spent 11 years working in the corporate credit and equity markets.

**TEMPLE FENNELL**  
Private Markets Consultant, Flagship Ventures
Temple has more than 20 years of operating experience, direct investing, corporate finance and project finance for early-stage and growth companies. Temple is on the board of the Single Family Office, Keller Enterprises LLC, an active investor in the clean energy and sustainable agriculture/food sectors. He is a Strategic Advisor for Flagship Ventures and advises members of the Venture Capital and VentureLabs management teams, with a particular focus on the Sustainability portfolio including sustainable food and agriculture, animal and human nutrition, renewable fuels and water. Through MIT and Harvard, Temple helps the next generation at multi-generational family offices to develop domain expertise, investment knowledge and financial skills to be more effective sustainability focused investors. He co-founded a Harvard Kennedy School Program in collaboration with the World Economic Forum titled “Impact Investing Strategy for the Next Generation” under the Initiative for Responsible Investing. Temple is a MIT Sloan Fellow and helps organize the MIT “Visionary Investing” workshops for family offices.

**CHARLES FIELDS**  
Chair, Edward Hazen Foundation
Charles Fields currently serves as a Senior Program Officer for Los Angeles for The California Endowment. Under the Endowment’s 2010-2020 strategic plan, Fields is responsible for strategy development, grant making and leadership activities in Los Angeles County. Fields co-developed and manages The Endowment’s $50 million grantmaking and leadership program focused on improving the health, wellness and opportunity structures of boys and young men of color—Sons & Brothers program. During his tenure at the Endowment, Fields also co-developed a $260 million public private loan fund, the FreshWorks Fund, to increase access to healthy foods and spur economic development in underserved communities in California. As a grant maker at the Marguerite Casey Foundation, Fields managed a $29 million portfolio of grants focused on community economic development, civic engagement, educational equity, violence prevention and family support. Fields has his Master’s in Education and Bachelors in Organizational Communications and American History from Xavier University in Cincinnati, Ohio.

**DEBORAH FRIEZE**  
Managing Partner, Boston Impact Initiative
Deborah Frieze is an author, entrepreneur and social activist. Her award-winning book (co-authored with Meg Wheatley), Walk Out Walk On: A Learning Journey into Communities Daring to Live the Future Now, profiles pioneering leaders who walked out of organizations failing to contribute to the common good—and walked on to build resilient communities. She is a founding partner of the Boston Impact Initiative, an impact investing fund that seeks to create systemic shifts in opportunity for urban communities. The fund takes an integrated capital approach, combining investing, lending and giving to help build resilient local economies. Deborah is also founder of the Old Oak Dojo, an urban learning center where neighbors gather to rediscover how to create healthy and inclusive communities.

**BEN GADDY**  
Director of Technology Development, Clean Energy Trust
As Director of Technology Development, Ben helps CET portfolio companies bring their technology to market. He also works with established corporations to source new clean energy technology from startups, universities, and national labs. After finishing his PhD in Materials Science, Ben was awarded the AAAS Science and Technology Policy Fellowship in the Clean Energy Manufacturing Initiative, the Department of Energy’s manufacturing think tank. There, he researched the challenges faced by cleantech startups in scaling new innovations to manufacturing. Before beginning his PhD, Ben worked at the U.S. Patent and Trademark Office, where he reviewed patent applications for next generation speech recognition technologies.

**LISA GILBERT**  
Congress Watch Director, Public Citizen
Lisa Gilbert is the director of Public Citizen’s Congress Watch division. She advocates for government transparency and integrity, financial reform, civil justice, and consumer protection.

Gilbert has testified before Congress, and been quoted in publications such as The New York Times, The Wall Street Journal, The Washington Post and NPR. She was a featured contributor to the National Journal’s “Expert Blog” on lobbying and ethics, and writes frequently for The Huffington Post, Yahoo Finance, and The Hill. Previously, Gilbert was the Democracy Advocate for the U.S. Public Interest Research Group. Prior to U.S. PIRG, Gilbert was a campaign director for outreach campaigns to pass legislation on social justice and environmental issues for organizations such as the Human Rights Campaign, the Sierra Club and Environment Washington.

**SHAWN GINWRIGHT**  
Trustee, The California Endowment
Shawn Ginwright, a leading national expert on African American youth, youth activism, and youth development. Dr. Ginwright serves as the Senior Research Associate at the Cesar Chavez Institute for Public Policy in San Francisco, and is also an Associate Professor of Education in the Africana Studies Department at San Francisco State University. He is the author of “Hope and Healing in Urban Education”, “Black Youth Rising, Activism and Radical Healing in Urban America”, “Black in School- Afrocentric Reform, Black Youth and the Promise of Hip-Hop Culture” and co-editor of “Beyond Resistance: Youth Resistance and Community Change: New Democratic Possibilities for Practice and Policy for America’s Youth”.

**NEVA GOODWIN**  
Co-Director, Global Development and Environment Institute, Tufts University
Neva Goodwin is Co-director of the Global Development and Environment Institute, a research unit at Tufts University, where she works to systematize an economic theory that will have relevance to contemporary real world concerns. She has edited more than a dozen books, and is the lead author of three introductory textbooks, including Principles of Economics in Context, published by Taylor & Francis. Dr. Goodwin led the creation of a “social science library” which contains over 9,000 full bibliographic references, representing seven social sciences, and including full text PDFs for a third of the articles. It is being distributed widely on USB drives and CD-ROMs in 138 developing and transitional countries, with special efforts to reach institutions with poor or no Internet access. A web version for institutions that have access to academic search engines will be available in late 2015.

**SYED M HASHemi**  
Senior Advisor, Graduating the Poor Initiative, CGAP, The World Bank
Syed M Hashemi has a long career in teaching, research and managing programs for the poor. He taught Economics at Jahangirnagar University in Bangladesh, directed an anti-poverty research program at Grameen Trust, and set up a development institute and chaired the Department of Economics and Social Sciences at BRAC University. He spent nine years with CGAP, at the World Bank, focusing on financial inclusion of the poorest and ensuring a social performance bottom line in microfinance. He also headed a multi-country program to develop new pathways to graduate out of extreme poverty and food insecurity through integrating social protection, livelihood activities and financial services. Hashemi continues to be Senior Advisor for the graduation program at CGAP. He has a Ph.D. in Economics from the University of California at Riverside.
ANNE HASTINGS  
Manager, Microfinance CEO Working Group  
Anne Hastings has been the Executive Director of the Microfinance CEO Working Group, a collaborative effort of the CEOs of ten global microfinance networks, since August 2013. Prior to assuming this position, she spent 17 years in the leadership of Fonkoze – Haiti’s largest microfinance institution, first as Director of Fonkoze and then as CEO of Fonkoze Financial Services, S.A., which she helped to found in July 2004. She was a member of the Board of Directors until early in 2015. In 2007, Anne was awarded an Honorary Doctorate in Business Leadership by Duquesne University. The following year she was honored at the United Nations because of her commitment to the elimination of extreme poverty. In 2010, the Schwab Foundation named Anne a Social Entrepreneur of the Year.

LISA HAYLES  
Institutional Investment Services, Boston Common Asset Management  
Lisa works closely with members of Boston Common’s investment team to liaise with existing institutional client and supports the development of new relationships with investors and consultants. She sits on the US Sustainable and Responsible Investment Forum’s Diversity Committee (US3F) and is also a volunteer member of the USSIF International Working Group (IWG). As an IWG member, Lisa co-organized and moderated a half-day session on Gender and Investing at the USSIF’s 2015 Annual Conference in Chicago. As Boston Common’s representative to the 30% Coalition, she has contributed to the development of a new membership outreach strategy, making the business case for corporations to support greater gender diversity on boards. Her previous work experience includes advising pension funds and other institutional investors on responsible investment strategies at the ESG Research firm EIRIS in London, and roles at the Social Investment Organization and the Ontario Women’s Directorate in Canada, the UNDP in Jamaica and the OECD in Paris, France. Lisa holds degrees from the University of Toronto (BA), University of Guelph (Msc. International Development) and the Sorbonne (French Language Certificate). She is currently a 2015 Level I Candidate in the CFA Program.

AMANDA HANLEY  
Co-Founder and Director, Hanley Foundation  
Amanda Hanley is a co-founder and a Director of the Hanley Foundation, formed to advance environmental, educational and empowerment solutions. She serves on numerous boards and committees, including the Natural Resource Defense Council (NRDC) Midwest Council and Global Leadership Council; Academy for Global Citizenship, a green Chicago Public Charter School; Fresh Taste, an initiative to advance the Midwest’s good food system; and North Shore Green Women and Chicago Women in Green, both of which are social networks for local green women activists and professionals. Along with her husband, George, she helped found the Hanley Sustainability Institute at the University of Dayton and is an advocate and signatory of Divest-Invest. Amanda has written about eco-issues for Crain’s Chicago Business and Make It Better, as well as for The Huffington Post.

STEPHEN HEINTZ  
President, Rockefeller Brothers Fund  
Stephen Heintz is President of the Rockefeller Brothers Fund. Before joining the RBF, he held top leadership positions in both the nonprofit and public sectors. Most recently, he was founding president of Démos, a public policy research and advocacy organization working to enhance the vitality of American democracy and promote more broadly shared prosperity. Prior to founding Démos, he served as executive vice president and chief operating officer of the EastWest Institute (EWI), where he worked on issues of economic reform, civil society development, and international security. Based in Prague, Czech Republic, from 1990 through 1997, he worked extensively throughout Central and Eastern Europe and the New Independent States. He devoted the first 15 years of his career to politics and government service in the State of Connecticut, where he served as commissioner of economic development and commissioner of social welfare. In 1988, he helped draft and secure passage by Congress of “The Family Support Act,” the first major effort to reform the nation’s welfare system. He currently serves on the boards of the EastWest Institute, the Rockefeller Archive Center, and The American Prospect. He is a member of the Council on Foreign Relations and a fellow of the American Academy of Arts and Sciences. In 2009, 2010, 2011, 2013, and 2014 the Nonprofit Times named him one of the 50 most influential leaders of the nonprofit sector. In 2013, President Bronislaw Komorowski of Poland granted him the Officer’s Cross - Order of Merit of the Republic of Poland for his contributions to building civil society and democratic institutions in Poland.

PHIL HENDERSON  
President, Surdna Foundation  
Phil joined Surdna in 2007, and under his leadership the foundation has reshaped its programs based on its mission to foster just and sustainable communities in the United States. Prior to his appointment at Surdna, Phil was vice president of the German Marshall Fund (GMF) of the U.S., which he joined in 1998 as a program officer responsible for grantmaking in economics. He later worked on special projects promoting civil society development in Central and Eastern Europe, including serving as chairman of the Trust for Civil Society in Central and Eastern Europe. Prior to GMF, Phil worked with the Civic Education Project (CEP), a non-profit group specializing in higher education reform in Central and Eastern Europe. He also served as a visiting economics lecturer at the University of Timisoara in Romania, country director for CEP in Romania, and director of CEP’s Central and East European programs while based in Prague and Budapest. Phil serves as chairman of the Romanian American Foundation, and also sits on the boards of BoardSource, Living Cities, the Center for Civic Engagement at Bard College, and International House. Phil holds an M.A. in economics from the University of California, Santa Barbara, and a B.A. in economics from Michigan State University.

DONNA HOUSE  
Ethnocultural Botanist  
Donna House has three decades of experience in conservation of biodiversity and bio-cultural diversity. She is an expert in federal/tribal management systems, Indigenous community/organizational protocols and challenges, environmental policy, and Indigenous land rights. House is an expert in protecting eco-cultural diversity from the adverse impacts of development, particularly in the energy sector. She conducts research, manages and evaluates projects, and does botanical consulting and fundraising. House was one of the key designers for Smithsonian National Museum of the American Indian in Washington, DC. House has worked as field botanist with conservation organizations and tribal endangered species programs, and served on US Fish and Wildlife Service Recovery Team for Endangered Plants. House migrates between her homeland, Teelch’iint’ii on the Navajo Nation, and a farm along Rio Grande in Othkay Owingegeh territory.

JOSHUA HUMPHREYS  
President and Senior Fellow, Croatan Institute  
Joshua Humphreys is President and Senior Fellow of Croatan Institute, an independent, nonprofit institute for advanced social and environmental research and engagement, working on the frontiers of sustainability and finance. A leading authority on integrating environmental, social and governance issues into investment decision-making, Dr. Humphreys has taught at Harvard, Princeton, and NYU, and served as scholar-in-residence at the Rockefeller Archive Center, a Fullbright Scholar in Paris, and an Aspen Environment Forum Scholar. He has written widely on mission-related investing by foundations and endowments, and his insights on trends in philanthropy, sustainable finance, and impact investing have been widely published in the press, most recently in Barron’s, Bloomberg, BusinessWeek, the Financial Times, Forbes, Institutional Investor, Pensions and Investments, and the Journal of Investing. He currently serves on advisory boards of the Dwight Hall SRI Fund at Yale University, the Responsible Endowments Coalition, and the Coalition for Responsible Investment at Harvard. He also serves as an Associate Fellow at Tellus Institute, the sustainability think tank in Boston.
SAYER JONES

**Director of Finance and Mission-Related Investments, Meyer Memorial Trust**

Sayer Jones is the Director of Finance and Mission-Related Investments at the Meyer Memorial Trust in Portland Oregon; his night job is recording YouTube videos with his 8-year-old son. In both endeavors Mr. Jones leverages his background, humor and big picture thinking to showcase his passion for family, Oregon and doing right by the community. In his role as Director of Finance he oversees the daily functions of the finance and accounting department and is tasked with budgets audits and so forth. In his role as the Director of Mission-Related Investing, he spends his time on surfacing, reviewing and eventually investing in opportunities that add to the Trust's mission to build a flourishing and equitable Oregon. Examples are investments in the Portland seed fund Ecotrust Forests, Women's Venture Fund and the Oregon Angel fund along with assisting in the Program Related Investment portfolio (low interest loans to not for profits in Oregon) for the past seven years. Prior to joining the Trust Mr. Jones worked as a CPA at Moss Adams LLP doing taxes and consulting services for a wide variety of clients, but mostly focused on the Not for Profit sector. While not working or keeping up with this three children Mr. Jones likes to bike, read and play video games.

BRUCE KAHN

**Portfolio Manager, Sustainable Insight Capital Management, and Confluence Board Member**

Bruce has over 26 years of experience in environmental and investment research and management. Currently, Bruce is the Portfolio Manager at Sustainable Insight Capital Management. Previously, Bruce was a director in Deutsche Bank’s Asset Management division, where he acted as an investment strategist conducting high-level analytical research on sustainable investing including clean tech, water and agricultural-based investment strategies as well as ESG/SRI strategies. Prior to that, he managed assets at Smith Barney’s Private Wealth Management Group in sustainable investments including agri-business and clean tech for foundation/endorsement, HNWI and institutional clients. Bruce currently serves as a trustee and chair of the Finance Committee of the Robert and Patricia Switzer Foundation, and previously served on the finance committee of the Christopper Reynolds Foundation and as trustee of the Jesse Smith Noyes Foundation. He also serves as a member of the Board of Visitors for the Gaylord Nelson Institute of Environmental Studies at the University of Wisconsin, Madison and is on the Technical Review Panel of National Renewable Energy Laboratory. Recently, Bruce has joined the Advisory Council of the Sustainability Accounting Standards Board and serves on the Advisory Panel of Mercer Investment Consulting and Management’s Sustainable Opportunities Fund. Bruce is a recipient of both a J. William Fulbright Scholarship and a National Science Foundation fellowship in ecological economics and served in the Peace Corps in the Republic of Cameroon, (1989-1993). Bruce holds a BA in Ecology & Evolutionary Biology from the University of Connecticut; an MS in Fisheries and Allied Aquacultures from Auburn University; and PhD in Land Resources from University of Wisconsin, Madison. Bruce currently is a lecturer of finance, statistics and agriculture courses at Columbia University’s Earth Institute in the Sustainability Management Program.

MITCH KAPOR

**Partner, Kapor Center for Social Impact**

Mitch Kapor is Partner at the Kapor Center for Social Impact and Kapor Capital, where he works with startups using information technology platforms to drive disruptive innovation. A pioneer of the personal computing industry and a serial entrepreneur, Mitch was a seed stage investor in Uber, Twilio, Inkling and University Now. His focus is increasingly on driving positive social impact, especially in leveraging IT to close gaps of opportunity and access in education, health care and other areas. Mitch founded Lotus Development Corporation and designed Lotus 1-2-3, the “killer application” which helped make the personal computer ubiquitous in the business world in the 1980s. He is the co-founder of The Electronic Frontier Foundation (EFF), which protects freedom and privacy on the Internet and is the founding chair of the Mozilla Foundation, the creator of the open source web browser Firefox. He is also a founding investor in Linden Lab, maker of the first successful virtual world, Second Life. Currently he serves on the board of Level Playing Field Institute, whose mission is to enhance equal opportunity in education and the workplace. Mitch is also on the Advisory Board of Generation Investment Management, a firm whose vision is to expand sustainability into the mainstream capital markets.

JENNY KASSAN

**Owner, Jenny Kassan Consulting**

Jenny has two decades of experience as an attorney and advisor for mission-driven enterprises. She has helped her clients raise millions of dollars and raised several hundred thousand for her own business. Jenny serves her clients in the areas of business start-up, entity structuring to preserve mission, enterprise finance, securities regulation, investment crowdfunding, nonprofit law, and cooperatives. Jenny earned her J.D. from Yale Law School and a masters degree in City and Regional Planning from the University of California at Berkeley. She was recently appointed to the Securities and Exchange Commission Advisory Committee on Small and Emerging Companies. Prior to beginning her work in securities and finance, Jenny worked for eleven years at a nonprofit community development corporation in Oakland, where she served as staff attorney and managed community economic development projects including the formation and management of several social ventures designed to employ and create business ownership opportunities for low-income community residents. Jenny is the President of Community Ventures, a nonprofit organization dedicated to promoting the economic and social development of communities. She also co-founded the Sustainable Economies Law Center, a nonprofit that provides legal information to support sustainable economies.

JON JENSEN

**Executive Director, Park Foundation**

Jon Jensen is Executive Director of the Park Foundation which is based in Ithaca, NY. In this role he serves as the interface between the foundation’s program and investment activities. The Park Foundation has committed to 100% mission-related investing, and is active in program related investments, shareholder advocacy and proxy voting. Jon’s previous positions include Associate Director of the Pew Conservation Scholars Program, Senior Program Associate of the Pew Charitable Trusts, and Executive Director of Wildlife Conservation Trust International. He has a B.S. in Psychobiology from Albright College and a M.S. in Animal Behavior from Bucknell University. Jon is a founding board member and President of the Board of Confluence Philanthropy. His career in philanthropy spans 28 years of grantmaking, and includes founding roles in The Funders Network for Smart Growth and Livable Communities, where he also served as chair of the board, and the Environmental Grantmakers Association, where he twice served as chair. He has received career achievement awards from Ohio Citizen Action, the Institute for Conservation Leadership and Ohio Environmental Council.

MARIA JOBIN-LEEDS

**Founder and Managing Partner, Jobin-Leeds Partnership for Democracy and Education**

Maria Jobin-Leeds likes to think at the systems level, asking questions about what’s happening upstream that produces so many hungry women and children in this rich country. With others she has launched and nurtured successful high-impact social change organizations to transform our structures, including two foundations. Access Strategies funds community civic groups to use democracy to create equity by race, gender and income. Schott Foundation for Public Education supports parents, students, educators and policy makers together to create educational opportunity for all. For “Maria’s List” we comb the country for champions for public office who will promote bold social and economic policy that is inclusive by race and gender. As an investor, she now applies the same values to several portfolios. Maria predicts more moments of resistance to crushing oppression and creative alternatives for the new solidarity economy.
SONIA KOWAL
President, Zevin Asset Management
Sonia Kowal is Zevin Asset Management’s president. She is also a member of the firm’s investment committee, where she incorporates sustainability issues into investment decision making and oversees Zevin’s shareholder advocacy work as well as the integration of environmental and social issues into the investment process. Previously, Sonia headed Ethical Investment Research Services’ (EIRIS) U.S. office and was a portfolio manager and investment research analyst at Baillie Gifford in Scotland. Sonia holds a BS in Zoology from the University of Edinburgh and an MS in Investment Analysis from the University of Stirling, Scotland. She is an active member of US SIF (the Forum for Sustainable and Responsible Investment) and sits on the steering committee of US SIF’s International Working Group. Sonia currently sits on the board of Womnende Boston, a women’s giving circle dedicated to raising awareness and funds for programs that positively impact the lives of women and teen girls in the Boston area.

DENNIS J. KUCINICH
Former U.S. Representative
Dennis J. Kucinich is a highly respected public servant and progressive icon with an exhaustive knowledge of how to make government work for the people. Kucinich’s commitment to bettering the lives of the public began at a young age. The eldest of seven children of working class parents, he grew up in the inner city of Cleveland and lived in 21 different places by age 18. This first-hand experience with poverty and homelessness instilled in him a passionate drive to fight for the needs of the ordinary American. In 1969, at age 23, Kucinich was elected to the Cleveland City Council. Eight years later he became, at the time, the youngest mayor of a major American city. After serving as an Ohio State Senator from 1994-96, Kucinich was elected U.S. Representative for Ohio’s 10th congressional district, a seat he held for seven terms. A candidate for the Democratic nomination for U.S. President in 2004 and 2008, he has been a tireless advocate for worker rights, civil rights, and human rights, and has been honored by numerous groups, including Public Citizen and the Sierra Club as a champion of the environment.

NATASHA LAMB
Director of Equity Research and Shareholder Engagement, Arjuna Capital
Natasha Lamb is the Director of Equity Research and Shareholder Engagement and a portfolio manager at Arjuna Capital. Specializing in the integration of sustainability and shareholder value creation, Natasha integrates Environmental Social and Governance (ESG) factors into fundamental investment decisions, while engaging corporate leadership to improve performance through shareholder proposals, dialog, and public policy advocacy. Previously, Natasha was Vice President, Shareholder Advocacy and Corporate Engagement and an equity analyst at Trillium Asset Management. Natasha contributes thought leadership to the Guardian; as a Ceres Coalition member, advising corporate leadership; through the United Nations’ UNEP FI Climate Change Working Group; and as a founding organizer of Greater Boston Slow Money. In 2011, Dana served as the Program Director and Board Advisor at The Swift Foundation while launching Confluence. Prior to working in philanthropy, Dana founded Literacy for Environmental Justice (LEJ), an environmental education and youth empowerment organization for at-risk youth. While there, she acted as a lead organizer in the closure of San Francisco’s infamous Hunters Point Power Plant and raised raising funds to supplant it with the region’s first off-the-grid educational Eco Center. She has been a fellow at the Donnella Meadows Program in Systems Theory and the California Women’s Foundation Policy Institute. Dana has also lived and worked among the Samburu (Maasai) in northern Kenya for many years; she also worked with the Cheyenne River Lakota and Roma refugees in Europe. A nomad in spirit, Dana sometimes lives in Oakland, California and at other times in Brooklyn, NY.

ANDY LOWER
Co-Founder & Board Chair, Visible Clothing
Andy Lower co-founded VisibleClothing in January 2014 after giving away all his clothes and committing to only buy clothes that have been made fairly (www.whomademywardrobe.co.uk). Visible produces and sells fashionable, affordable, ethical clothes, for both its own private line as well as for other ethical clothing companies. Visible also proactively learns with and educates customers and other values-driven companies on how to purchase in line with their values. Prior to co-founding Visible, Andy founded ADAP Capital LLC in September 2013. ADAP (A Different Approach to Poverty) invests in early-stage entrepreneurs who are working to eradicate extreme poverty. In addition to providing monetary capital, ADAP Advisory Services LLC provides intellectual capital, working closely with entrepreneurs to deepen the value and impact of their social enterprises. A British national and qualified Barrister, he has traveled extensively, working with national partners across the developing world.

DAVID S. LYNCH
President, Managing Partner, Deputy Chief Investment Officer, Athena Capital
David oversees all of Athena’s investment management and business functions, with a particular focus on integrating strategy across asset classes, prioritizing research initiatives, and addressing client-specific requests. As a member of the Investment Committee, he helps guide Athena’s asset allocation, manager selection and portfolio construction processes. David has been a key contributor to Athena’s business leadership and growth since joining the firm in 2004. David’s extensive capital markets background provides a unique perspective and insight on global investing. Prior to Athena, he was portfolio manager for emerging markets fixed income at Colorado PERA, the $40 billion state pension fund. During his time at PERA, David also covered various industries for high yield and investment-grade corporate debt portfolios. Prior to PERA, David worked at Eaton Vance Management in Boston as a member of the research and trading team for strategic income and government obligation funds, including global bonds, mortgage-backed securities, currencies, and derivatives. David began his career as an economist, covering the global electronics industry for Cahners Economics. David received his MBA in administration from the F.W. Olin School of Business at Babson College and his BA in economics from Dartmouth College.
SPEAKER BIOS (M-P)

HOPE MAGO
Principal, Huntington Capital
Hope joined HCAP Partners in May 2009. Hope participates in the origination and analysis of new investment opportunities, investment due diligence, deal underwriting, and investment monitoring.

Prior to joining HCAP Partners, Hope worked as an analyst at the Reserve Bank of Zimbabwe, where he was involved in economic policy formulation, lending due diligence for export ventures receiving funding through the Export Support Facility under the Exchange Control Division. Before that he spent a year interning at First Mutual Limited, the second-largest life insurance and money manager in Zimbabwe. Hope earned an International MBA from the University of San Diego and holds a bachelor’s degree in finance and banking from the University of Zimbabwe. Hope is currently a board observer or actively involved in RJE International, Cubex, TriMetrica, Michael’s Cookies, Geary LSIF, and CNC Data.

NICOLAS MANG
Executive Director, Jessica’s Love Foundation
Nicholas Mang is a community development activist and educator focused on innovating holistic, cross-sector strategies for regenerating local economies, cultures, and ecologies of place. He is executive director of Jessica’s Love Foundation, a principal consultant at Regenesis Collaborative Development Group, and founder of Story of Place Institute. Nicholas has over fifteen years of work experience in communities across North America, organizing and facilitating community redevelopment initiatives. Current work projects include co-leading the development of IN Santa Fe (Impact Network Santa Fe) a local impact investing “collaboratory” – a collaborative community network for learning and experimentation-- dedicated to building shared learning, information, capacity, and support for growing a more robust, place-sourced impact investing ecosystem in the Santa Fe, New Mexico region.

CARA MATTELIANO
Vice President for Community Impact, Community Foundation for Greater Buffalo
Cara Matteliano, Vice President for Community Impact at the Community Foundation for Greater Buffalo, has over 25 years of experience in not-for-profit leadership, program development, and grantmaking. She has created and facilitated collaborations such as Buffalo’s Green and Healthy Homes Initiative, the Coalition for a Lead Free Community and the Western New York Environmental Alliance. She has led many efforts to attract national support for Buffalo causes, multiplying the foundation’s investments many times over. Her work has been recognized by the Secretary of the U.S. Department of Housing and Urban Development, the U.S. Environmental Protection Agency, and the Sierra Club.

MARC MAUER
Executive Director, The Sentencing Project
Marc Mauer is one of the country’s leading experts on sentencing policy, race and the criminal justice system. He has directed programs on criminal justice policy reform for more than 30 years and serves as Executive Director of The Sentencing Project, a national non-profit organization engaged in research and advocacy on criminal justice policy. Mr. Mauer has written extensively and testified before Congress and other legislative bodies. His critically acclaimed book, “Race to Incarcerate,” was named a semifinalist for the Robert F. Kennedy Book Award, and he is the co-editor of Invisible Punishment, a collection of essays that examine the social costs of incarceration. Mr. Mauer frequently lectures before a broad range of national and international audiences, appears regularly on television and radio, and has served as an adjunct faculty member at George Washington University and Payne Theological Seminary. Mr. Mauer is the recipient of the Donald Cressey Award for contributions to criminal justice research, the Alfred Lindesmith Award for drug policy scholarship, and the Maud Booth Award for correctional services.

HEATHER C. MCGHEE
President, Demos
Heather C. McGhee is President of Demos, a public policy organization working for an America where we all have an equal say in our democracy and an equal chance in our economy. In 2009, she co-chaired a task force within Americans for Financial Reform, and in 2008 she served as the Deputy Policy Director in charge of Domestic and Economic Policy with the John Edwards for President Campaign. She holds a B.A. in American Studies from Yale University and a J.D. from the University of California at Berkeley School of Law. McGhee is an MSNBC contributor, a member of the World Economic Forum’s Global Agenda Council on Civic Participation, and serves on the boards of the Center for Working Families and Consumer Reports.

LIZ MICHAELS
Chief of Staff, Aperio Group
Liz Michaels is Aperio Group’s Chief of Staff and Director of ESG/SRI. Prior to joining Aperio, Liz was responsible for the $11 billion defined contribution managed accounts business at Ibbotson Associates, a wholly-owned subsidiary of Morningstar, Inc. Earlier in her career, Liz was the Chief Operating Officer of Morningstar and served on the company’s executive committee. Liz was also the President of Jellyvision, Inc., an interactive firm best known for its game, You Don’t Know Jack™ and Associate Dean/Director of the Career Advising and Planning Services office at the University of Chicago. Liz has a BA in economics and an MBA from the University of Chicago.

ASHBY MONK
Executive and Research Director, Stanford Global Projects Center
Dr. Ashby Monk is the Executive and Research Director of the Stanford Global Projects Center. He is also a Senior Research Associate at the University of Oxford and a Senior Advisor to the Chief Investment Officer of the University of California. Dr. Monk has a strong track record of academic and industry publications. He was named by CIO Magazine as one of the most influential academics in the institutional investing world. His research and writing has been featured in The Economist, The New York Times, the Wall Street Journal, the Financial Times, Institutional Investor, Reuters, Forbes, and on National Public Radio, among a variety of other media. His current research focus is on the design and governance of institutional investors, with particular specialization on pension and sovereign wealth funds. He received his Doctorate in Economic Geography at Oxford University and holds a Master’s in International Economics from the Université de Paris I – Panthéon Sorbonne and a Bachelor’s in Economics from Princeton University.

ROLANDO MORILLO
Senior Equity Analyst, Rockefeller & Co
Rolando Morillo has over fourteen years of experience in the investment department of Rockefeller & Co. and is currently Vice President of Sustainability and Impact Investments. He is responsible for identifying and supporting the management of public equity investments for the Rockefeller Ocean Strategy and the Global Sustainability and Impact strategy within the Rockefeller Asset Management division. As a member of the Rockefeller Sustainability and Impact Investment team, Rolando is actively focused on integrating sustainability research into fundamental equity analysis.

During the past seven years, his responsibility shifted to become engaged in the research and identification of solution-oriented companies within renewable energy, water infrastructure and resource sustainability. More recently, he has led the effort to identify companies that promote sustainability and corporate responsibility and deepen the firm’s research capability in tandem with the sustainability and impact investment team. He is a member of the stock selection committee and the sustainability and impact investment replacement committee at Rockefeller & Co. Prior to joining Rockefeller & Co, in 2000, Rolando was a portfolio analyst at UBS private banking Latin America division. He obtained his B.A. in environmental economics and geography from Rutgers University.
MARIA MULKEEN
Program Officer, Affordable Housing, Hyams Foundation
Maria Mulkeen is a Program Officer for the Hyams Foundation, with lead responsibility for Foundation’s work in the affordable housing area. Her recent work has included structuring the Foundation’s $1.5 million program related investment to the Equitable Transit Oriented Development Accelerator Fund, a loan pool that provides early stage financing to help spur the development of affordable and mixed income housing in transit rich areas in Boston and throughout Massachusetts. Maria joined the Foundation in 2011 with a strong background in community development. Previously, she served as Senior Project Manager for the Jamaica Plain Neighborhood Development Corporation where she spearheaded a number of affordable housing developments. In addition to over 15 years in the community development field, Maria has a strong civic engagement background, having worked with a variety of local civic and resident groups. She has a Masters in City Planning from the Massachusetts Institute of Technology and a B.A. from the University of New Hampshire.

BRUCE OBERFEST
Founding Member, Bruce Oberfest & Associates
Bruce Oberfest, a CPA and attorney, is the founder of Bruce Oberfest & Associates. The firm specializes in income and estate tax planning for high net worth individuals, small and medium size businesses, and management of family offices. In addition to his law and accounting degrees, he also has received a Master of Tax Law graduate degree (LLM) from New York University. Bruce assists many of his clients in investment planning and charitable giving planning. Over the past few years he has helped clients develop specific giving plans and projects to meet their long-term charitable programs.

WILLIAM H. PAGE
Senior Vice President, Essex Investment Management, LLC
Bill is a Portfolio Manager on the Essex Global Environmental Opportunities Strategy (GEOS). Bill directs environmental investment policy and research for Essex, and is on the Investment and Proxy Voting Committees. Prior to joining Essex in 2009, he spent eleven years at State Street Global Advisors (SSGA), most recently as Lead Portfolio Manager for GEOS and head of the Environmental, Social and Governance (ESG) investment team. Bill developed GEOS over a four-year period at SSGA, and was a member of the Global Fundamental Strategies group. Prior to SSGA, Bill worked in product management for Wellington Management Company, LLC. Before Wellington, he worked for Fidelity Investments in asset allocation. Bill has lectured extensively on environmental investing at global investment conferences and academic institutions. During business school, Bill worked on socially responsible investment research at KLD Research & Analytics. He is on the Advisory Board of the Journal of Environmental Investment, a peer-reviewed, open-access journal that publishes original research at the intersection of the environment and investing. He earned a Bachelor’s degree in economics from Boston University and an MBA from the F.W. Olin School of Business at Babson College.

TRACY PALANDJIAN
CEO & Co-Founder, Social Finance, and Board Member, Surdna Foundation
For more than a decade, Tracy has been committed to building a more impactful nonprofit sector by reimagining the role of the capital markets in enabling social progress. Inspired by Social Finance UK, Tracy co-founded Social Finance US in January 2011 to develop the Social Impact Bond and Pay for Success model in the United States. Prior to Social Finance, Tracy was a Managing Director for 11 years at The Parthenon Group, where she established and led the Nonprofit Practice. Tracy also worked at Wellington Management Co. and McKinsey & Co. Tracy is co-author of “Investing for Impact: Case Studies Across Asset Classes.” She is Vice-Chair of the U.S. National Advisory Board to the Global Impact Investment Steering Group (previously the G8 Taskforce). She is a member of the Board of Overseers at Harvard University, and serves on the boards of Facing History and Ourselves and the Surdna Foundation. She is also a Director of Affiliated Managers Group (NYSE: AMG). Tracy is a frequent speaker and writer on impact investing and social innovation, having been covered in The Wall Street Journal, the Atlantic, The Economist, Forbes, and The New York Times. A native of Hong Kong, Tracy is fluent in Cantonese and Mandarin. She graduated magna cum laude from Harvard College with a B.A. in economics, and holds an MBA with high distinction from Harvard Business School, where she was a Baker Scholar.

ESTHER PARK
CEO, Cienega Capital
Esther is the CEO of Cienega Capital, a private investment firm utilizing an integrated capital approach to systemic change in the areas of soil health, regenerative agriculture, and local food systems. Prior to joining Cienega Capital, Esther founded Commons Stock, an impact-focused due diligence consulting firm. Clients included high net worth individuals, foundations, and investment advisors. She has 15 years of experience in mission-based financial services ranging from microfinance to risk capital investments. Esther also serves as a board member at New Resource Bank, Nutiva, and City Fresh Foods, as well as an advisor to Kitchen Table Advisors.

Esther has also served as the Vice President for Strategy and Business Development at RSF Social Finance, where she oversaw all lending activity from 2007-2011, which resulted in a tripling of the loan portfolio and the development of a mezzanine debt fund. Esther received her MPP from University of Chicago and a BA in Social Welfare from the University of California at Berkeley. She lives in Berkeley with her husband, Greg, and their two children, Evangeline and Bryce.

MATTHEW W. PATSKY
CEO, Trillium Asset Management
Matthew Patsky is CEO and a portfolio manager, leading Trillium’s Sustainable Opportunities strategy. He joined Trillium 2009, and has three decades of experience in investment research and investment management. Matt began his career at Lehman Brothers in 1984 as a technology analyst. In 1989, while covering emerging growth companies for Lehman, he began to incorporate environmental, social and governance (ESG) factors into his research, becoming the first sell-side analyst in the U.S. to publish on the topic of socially responsible investing in 1994. As Director of Equity Research for Adams, Harkness & Hill, he built that firm’s powerful research capabilities in socially and environmentally responsible areas such as renewable energy, resource optimization, and organic and natural products. Prior to joining Trillium, Matt worked at Winslow Management Company in Boston, where he served as Director of Research, Chairman of the Investment Committee and portfolio manager for the Green Solutions Strategy and the Winslow Green Solutions Fund. Matt currently serves on the board of Environmental League of Massachusetts, Shared Interest, and Pro Mujer. He recently served on the board of US SIF and Root Capital. Matt is a member of the Social Venture Network (SVN). He is a Chartered Financial Analyst charter holder and a member of the CFA Institute. Matt holds a Bachelor of Science in economics from Rensselaer Polytechnic Institute.

NANCY E. PFUND
Founder and Managing Partner, DBL Partners
Nancy E. Pfund is Founder and Managing Partner of DBL Partners (formerly Investors), a venture capital firm whose goal is to combine top-tier financial returns with meaningful social, economic and environmental returns in the regions and sectors in which it invests. Ms. Pfund currently sponsors or sits on the board of directors of several companies, including SolarCity (NASDAQ: SCTY), where she is chair of the Governance Committee, and sits on both the Audit and Compensation committees, Primus Power, Powergenix, Farmers Business Network, The Muse and Off-Grid Electric, and, prior to their public offerings, Tesla Motors and Pandora Media. Prior to founding DBL, Ms. Pfund was a Managing Director in Venture Capital at JPMorgan. She started her investment career at Hambrecht & Quist in 1984.

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RAÚL POMARES
Founder, Sonen Capital
Raúl Pomares is the founder of Sonen Capital LLC, where he operates across the firm’s overall business activities while focusing on client management, business development and industry leadership. Prior to co-founding Sonen, Raúl served as a Managing Director at Springcreek Advisors, where he was in charge of the firm’s portfolio strategy. Previously, Raúl was a portfolio manager at Guggenheim Wealth Management, where he developed integrated multi-manager portfolios for institutional and high net worth clients. In particular, Raúl applied his expertise across a broad range of impact investment themes to create an integrated manager research and portfolio construction methodology for investors. Earlier in his career, Raúl co-founded a boutique wealth-management firm where he directed client services and portfolio management. He has also served as an investment advisor, international private banker, and consultant on behalf of global financial institutions and private investors.

Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.

- MARGARET MEAD

KATE POOLE
Core Leader, Regenerative Finance
Kate Poole works as a consultant, researcher and comics artist in the fields of local investing and alternative economic development. She’s deeply committed to exploring the intersection of religious beliefs and economic action, and you can check out her comics and zines on the topic at pooleaccounts.com. Right now she’s a turnaround consultant at Friends Rehabilitation Program, a Quaker values-based affordable housing and social service provider in Philadelphia. Kate organizes with Resource Generation and Regenerative Finance to leverage her resources and her owning class privilege for social change.

LIESEL PRITZKER SIMMONS
Co-Founder and Principal, Blue Haven Initiative
Liesel Pritzker Simmons is a co-founder and Principal of Blue Haven Initiative, a family office dedicated to investing for-profit and non-profit capital to advance solutions to social and environmental challenges. BHI is currently focused on new opportunities in both emerging markets and the United States. She is the Co-Founder of the IDP Foundation, Inc., a private foundation with a mission to mobilize resources and strategic support to increase educational opportunities. Established in 2008, the IDP Foundation has supported and developed a wide range of programs in the education sector, most notably the innovative IDP Rising Schools Program in Ghana, which leverages microfinance networks to empower nearly 200 low-cost private schools with trainings and financial services. Liesel is a co-founder of Opportunity International’s Young Ambassadors for Opportunity (YAO), a global network of young professionals who are passionate about microfinance. She serves on the boards of Waste Enterprisers, Eco-Post, and Synergos. Liesel attended Columbia University, where she studied African History. She lives in the Boston area with her husband, Ian Simmons.

RAMSAY RAVENEL
Executive Director, Grantham Foundation
Ramsay manages all aspects of the Grantham Foundation, including grant-making and endowment management. He was previously a founding member of the investment team at MissionPoint Capital Partners, an alternative energy private equity fund, and originated venture capital investments at SunEdison and EcoSecurities at Marshall Street Management, a family office. Ramsay has also worked in timberland investment and began his career working for a community forestry and conservation project in Indonesia. He is on the board of Flowcastings GmbH and Strategic Science & Technology, LLC and serves on the investment committee at the Massachusetts Society for the Prevention of Cruelty to Children. He holds Master’s degrees in Forestry and Business Administration from the Yale School of Forestry and Environmental Studies and the Yale School of Management and an AB in Environmental Science and Public Policy from Harvard College. Ramsay is a CFA charter holder.

MARK REED
Founder and Manager, Contact Fund LLC
Mark is Contact Fund’s Founder and Manager. Since 2005, Mark has been responsible for overseeing all underwriting, marketing, and operations of Contact Fund, including structuring 25 private loans to high-impact New York City nonprofits and raising capital from over 60 high net worth investors and foundations. Since 2008 Mark has been Principal at Alembic Community Development, a New York City-based developer of affordable and supportive housing with neighborhood restoration operations in New Orleans. Mark is a former Vice President of Portfolio Management at the Bank of New York, where he concentrated on North American corporate credit risk management. While at the bank, he co-managed a $500 million bond portfolio and a $300 million credit derivative portfolio. Since 2009, Mark has served on the Board of Directors of Green Diamond Resources Company, a fourth-generation, family-owned timber business based in Seattle. The company produces Forest Stewardship Council-certified redwood and Douglas fir lumber in California, and Douglas fir and hemlock logs in Washington State. Mark is also
a board member of the Rudolf Steiner School in New York, the North Star Fund, and the Corbin Hill Food Project. Prior to moving to New York, Mark managed an after-school program for public housing residents in San Francisco’s Mission District and managed a youth community center. He holds a BA in Anthropology from Stanford University and an MBA in Finance from the Stern School of Management at New York University.

**LISA RENSTROM**

**Trustee, Bonwood Foundation**

Lisa Renstrom identifies as a Nebraskan, but a decade in the hotel industry in Mexico enhanced her world view while she focused on a business bottom line—not a triple bottom line. Back in the U.S., she discovered the concept of social returns, first as a Sierra Club local group chair, then as Executive Director of Voice & Choices, President of the national Sierra Club and then Rachel’s Network. Lisa currently serves as a board member at Bonwood Social Investments, ecoAmerica, Interfaith Power & Light, and Confluence Philanthropy, while chairing the Management Committee for DivestInvest Individual. She studied at the University of Nebraska at Omaha, Owner President Management (OPM) at Harvard Business School, and she holds an MC/MFA from the Harvard University Kennedy School of Government.

**VALERIE ROCKEFELLER WAYNE**

**Trustee, Rockefeller Brothers Fund**

Valerie Rockefeller Wayne is a middle school special education teacher specializing in adolescents with learning differences and emotional disabilities. She began her teaching career at Central Park East Secondary School in East Harlem, New York, and also taught in Australia. Ms. Wayne has an M.Ed. in special education from Bank Street College of Education and an MAT from Columbia University Teachers College. She majored in international relations at Stanford University and served as a confidential assistant to Secretary Richard Riley at the U.S. Department of Education during the first Clinton administration. She serves as a trustee of D.C. Preparatory Academy and Rockefeller Philanthropy Advisors, and as vice chair of the Asian Cultural Council. She formerly was a trustee of Spelman College. Ms. Wayne lives with her husband Steve, daughters Percy and Lucy, and son, Davis, in Old Greenwich, CT and in St. Petersburg, Russia.

**JEAN ROGERS**

**CEO and Founder, SASB**

Jean Rogers is the CEO and Founder of SASB. Since 2010 SASB developed from an idea formulated in collaboration with the Harvard University Initiative for Responsible Investment at the Kennedy School of Government into a globally-respected, ANSI-accredited, independent standards-setting organization. Jean draws on her 20 years of experience in sustainability and management, consulting across a wide range of industries including utilities, extractives, financials, and real estate. She has worked with international clients to integrate sustainability into strategy and operations, minimizing risk and maximizing returns across the triple bottom line. Jean’s leadership experience includes 10 years as a Principal at Arup, a global engineering consultancy focused on sustainable development. Jean was also a management consultant at Deloitte, working in the environmental and manufacturing practices to help leading companies improve business and product performance through sustainability. Jean is a former Loeb Fellow at Harvard University and holds a PhD in Environmental Engineering from the Illinois Institute of Technology, and an ME in Environmental Engineering and a BE in Civil Engineering from Manhattan College. In 2015, she was named one of the Top 100 Most Influential People in Accounting by Accounting Today and one of the Most Powerful Women in Accounting by CPA Practice Advisor.

**JEFF ROSEN**

**Chief Financial Officer, Solidago Foundation**

Jeff Rosen is the Chief Financial Officer for the Solidago Foundation and its affiliated foundations, where he oversees all financial systems as well as managing the MRI and PRI portfolios. Jeff is a graduate of Cornell University’s School of Industrial and Labor Relations and holds a Master’s in Resource Economics and Policy from the University of Maine, where he worked to pioneer sustainability-focused impact assessment techniques. He has worked in the private sector as a serial entrepreneur, developing and selling food sector businesses, and as a chief financial officer for several restaurant chains and food manufacturers. He is an active, founding member of PVENTA, a local food system collaboration located in Western Massachusetts, where he is part of a group focused on financing the regional food economy. Jeff is an Adjunct Faculty Member in the Antioch University Sustainable MBA program, where he has taught Ecological Economics for Social Entrepreneurs since 2007. Jeff lives in Northampton, MA, with his wife and three children.

**JENNY RUSSELL**

**Executive Director, Merck Family Fund**

Jenny Russell has been Executive Director of the Merck Family Fund since 1998. She directs an annual $35 million budget primarily related to the environment and sustainability in both urban and rural settings. The Fund has been a leader in funding and initiating collaborative efforts to reduce consumption, land protection, urban green space, youth organizing and carbon pricing. In the past few years she has led the Fund’s interest in applying a climate lens to all programs, investments, and divestments. Prior to this position, Jenny headed the Island Foundation, another family foundation based in Marion, MA. During her ten-year tenure there, she helped to start a community foundation in Southeastern Massachusetts, a mini grants program in New Bedford, and the New England Grassroots Environment Program. She has been actively involved with the Environmental Grantmakers Association (EGA), the Consultative Group on Bio-Diversity, Associated Grant Makers, and Catalog Choice, serving on their boards, as chair and on numerous committees. Since graduating from the University of Colorado, Jenny has held positions in nonprofits including the Infinite Odyssey, where she led high school students on outdoor trips in the Rockies, Women’s Action for Nuclear Disarmament, and Earthwatch Institute.

**KELLY RYAN**

**CEO, Incourage Community Foundation**

For nearly 20 years, Kelly Ryan has led Incourage as CEO. Leveraging and connecting all forms of capital, Incourage envisions a community that works well for all. Over the course of two decades, Incourage has developed a holistic approach that is resident-centered, values-led and place-based. One demonstration of Incourage’s investment in community, as well as the residents who share the rural central Wisconsin place, is the Tribune (tribunebuilding.org). Named one of 50 most influential leaders in the nonprofit sector by the NonProfit Times, Ryan frequently speaks and writes about the opportunity for philanthropy at the intersection of people, place and prosperity.” By invitation, she has presented at the White House and Rockefeller Foundation’s Centennial Celebration. Kelly is an Aspen Institute Scholar, serves on the Hitachi Foundation Board of Directors, the National Fund for Workforce Solutions Partners Council, the Monitor Institute’s “What’s Next for Community Philanthropy” Advisory Committee, and is a contributing author to “Here for Good.” Twitter: @kryan_incourage

**ALEX SAINGCHIN**

**Program Officer, Common Counsel Foundation**

Alex is a program officer with the Common Counsel Foundation, where he oversees a set of family foundation and donor-advised fund portfolios supporting grassroots movements for social equity across the country. Previously, Alex was at The San Francisco Foundation, where he notably supported community-led coalitions seeking to leverage California’s groundbreaking climate change law to promote good clean jobs, affordable housing, and access to public transportation. Before working in philanthropy, Alex spent nearly 15 years as an organizer, community lawyer, and policy advocate. In the wake of September 11th, he co-designed a $1.15 million relief program at the Asian American Federation. His community organizing and policy experience includes work with the Restaurant Opportunities Center of New York, the New York City AIDS Housing Network (now known as VOCAL-NY), and the Urban Justice Center. As a community lawyer, Alex served as New Jersey director for the Asian American Legal Defense and Education Fund,
managing a worker and civil rights docket and overseeing its immigrant rights organizing. He has also worked in government, serving as counsel with New Jersey’s Office of the Public Defender, and as chief of staff to Councilman-at-Large Rolando R. Lavarrro, Jr. in Jersey City.

SADNA SAMARANAYAKE
Project Director, Ultra-Poor Graduation Initiative, BRAC USA
Sadna manages consulting services and provides technical assistance to external governments and NGOs related to BRAC’s pioneering Ultra-Poor Graduation approach. In addition to consulting services, Sadna also manages the creation and dissemination of knowledge products and global advocacy efforts related to the Graduation approach including outreach and engagement with implementing and funding agencies, immersion training and speaking engagements related to Graduation. Prior to her work at BRAC USA, she founded and was Managing Partner of B Inclusive, an organization providing consulting services to help market-based, BBD initiatives and inclusive businesses grow and thrive. She has consulted on strategy, barriers to scale, effective messaging and knowledge products for various social enterprises and development sector organizations. Her clients include The World Bank Group, World Bank Institute, Vision Spring, The Network Enterprises Fund and Ashoka’s Full Economic Citizenship Initiative. She writes and speaks on the subjects of livelihood development and innovation at the base of the pyramid. Previously, Sadna was the founder and Managing Partner of InSiteLogic, a technology and software development company providing solutions to a range of social enterprises, for-profit and non-profit organizations. She earned a Master’s degree in social entrepreneurship and international development from New York University and is a recipient of the Reynolds Fellowship for Social Entrepreneurs.

DAVID F. SAND
Chief Investment Strategist, Community Capital Management
David F. Sand is Chief Investment Strategist at Community Capital Management primarily responsible for business development and the creation of new products. David has more than 30 years of investment management experience and is a trailblazer in ESG/Impact Investing. He is a well-regarded speaker, lecturer and author on investing and ESG/Impact Investing issues. He co-founded Access Capital Strategies serving as its president and chief investment officer from 1994 to 2010. In this capacity, he pioneered the development of market-rate, fixed-income impact investments for institutional investors. He has worked as a consultant to community development financial institutions (CDFI’s), non-profits and social enterprises. In the early 1990s, he was the founding project director for CERES, leading the effort for transparency in corporate environmental reporting and engagement among NGOs, corporations and stakeholders. He received his Bachelor’s degree from Princeton University and a Master’s degree in public administration from Harvard University’s John F. Kennedy School of Government. David serves on the New York Advisory Board for Enterprise Community Partners, where he is Chair of the Loan Committee and is a former board member of U.S. SIF: The Forum for Sustainable Investment. David holds FINRA licenses Series 7 & 63.

ANDRÉE SAULNIER
Chair of the Investment Committee, Episcopal City Mission
Andrée M. Saulnier, Esq., is of counsel to the law firm of Choate, Hall & Stewart, LLP Boston, MA. She is a member of the firm’s Wealth Management Group, and concentrates her practice in estate planning and estate administration. Ms. Saulnier is a member of the Trusts and Estates Section of the Boston Bar Association. She is active in the community, having served as a member of the Leadership Council and Board of Visitors and as a parent spokesperson for the Franciscan Hospital for Children. Ms. Saulnier is also a member of the Newton-Wellesley Neighborhood Council and Treasurer for the Episcopal City Mission, of Boston. She earned a J.D., cum laude, in 1992 from Boston College Law School and graduated with University Honors from Wellesley University, with a B.A. in 1987.

JEFF SCHEER
Senior Client Advisor, Pathstone Federal Street
As a senior client advisor, Jeff develops and delivers portfolio advice and handles day-to-day client-related operations. He is a CFA charter holder and a member of the Boston Security Analysts Society. Jeff is also a faculty member for the Confluence Philanthropy Next Gen Fellowship Program, a learning program for trustees and individual donors seeking to align their values with the management of their assets. Jeff grew up in Albany, NY, and received a Bachelor of Arts degree in economics from Union College. At Union, Jeff was a Liberty League All-Academic Team performer as a member of the football team, as well as a member of the Omicron Delta Epsilon Economic Honor Society. Prior to joining Pathstone Federal Street (formerly Federal Street Advisors) in 2011, Jeff was an Accounts Receivable Specialist at Chapman Waterproofing where he handled contractor billing and the tracking and collection of accounts receivable. Jeff currently resides in South Boston with his wife, Estefania, and dog, Maeve.

DEBRA SCHWARTZ
Managing Director, MacArthur Foundation
Debra is a member of the Senior Management Group for the John D. and Catherine T. MacArthur Foundation, one of the nation’s largest independent foundations, and leads a team responsible for a $300 million portfolio of innovative loans, equity investments and guarantees dedicated to advancing the MacArthur philanthropic work in the U.S. and abroad. Before joining MacArthur in 1995, she was chief financial officer for a Chicago-based child welfare agency and an investment banker at John Nuveen & Co. specializing in municipal and health care finance. An expert on affordable housing, community and economic development, and social enterprise and philanthropy, Debra originated and taught a University of Chicago undergraduate course, “The Business of Nonprofits and the Evolving Social Sector,” from 2009-2012. She also has guest- taught classes at the graduate schools of business, law and policy at Yale, Harvard, Stanford, Northwestern, University of Chicago, and Oxford. She is a past presidential appointee to the United States Treasury Department Community Development Advisory Board and a founder of the Mission Investors Exchange. She holds a Master’s in finance and nonprofit management from the Kellogg School of Management at Northwestern University and received her Bachelor’s in history from Yale.

JON SCOTT
Director, Singing Field Foundation
Jon is President and Director of the Singing Field Foundation, a small foundation staffed on a volunteer basis by family members. With $5 million in assets, the foundation distributes $250,000+ annually in small grants to environmental, health, animal welfare and arts/culture organizations. The foundation practices mission-related investing to extend its impact. This involves “active ownership” including proxy voting, participation in shareholder initiatives, and investments screened for alignment with foundation and family members’ values. The foundation was one of the first 17 foundations that came together to launch Divest- Invest Philanthropy in 2014 (divestinvest.org). On the national staff of Clean Water Action and Clean Water Fund, Jon manages corporate partnerships and legacy gift programs. Jon also serves on the boards of the New England Grassroots Environment Fund and the Lebanon Opera House (Lebanon, NH), the Board and Executive Committee of Earth Share and co-chairs the Water Investors Working Group for Confluence Philanthropy.

FRAN SEEGULL
Chief Investment Officer and Managing Director, ImpactAssets
Fran Seegull is Chief Investment Officer and Managing Director at ImpactAssets, a non-profit investment firm seeking to increase the flow of capital to impact investing. She oversees firm product development and heads investment management for The Giving Fund, a $275 million impact investing donor-advised fund. Previously, Seegull was Managing Director and COO
of Funk Ventures, a VC firm investing in clean technology, sustainability and medical technologies. Seegull has consulted to National Geographic, NPR, and many family foundations. She served as VP of Business Development at Novica, a venture-backed social enterprise offering artisanal products from emerging markets.

Seegull has a B.S in economics from Barnard College and an MBA from Harvard. Seegull is Adjunct Professor at the Lloyd Greif Center for Entrepreneurial Studies and Senior Fellow at the Brittingham Social Enterprise Lab, both at USC’s Marshall School of Business. She serves on the board of the Barbara Lee Family Foundation and the Investment Committee of the Goldhirsh Foundation.

MARGOT SEIGLE
Member, Resource Generation
Margarit is a movement builder and donor organizer with a knack for organizing transformative retreats who spent the last two years residing and working at the Isabella Freedman Jewish Retreat Center in Falls Village, CT. Since 2010, Margot has been a member leader within Resource Generation. She is a founding organizer of the Hummingbird Fund for Migrant & Border Justice, a cross-class decision making collective that moved over $500,000 from 2011-2014 to organizations in Arizona led by those most impacted by anti-immigrant policies, and ReGenerative Finance, a new economics project working to transform the economy by transferring control of capital to communities most affected by economic & climate crisis. When she’s not working to normalize the radical redistribution of wealth, you can find her building community with fellow radical Jews, holding ritual space, singing with friends, painting with watercolors, and swimming in the lakes and rivers that surround her home.

RACHEL SEROTTA
Director of Investor Relations, Root Capital
Rachel joined Root Capital in 2012 and is responsible for managing the organization’s debt fundraising program, including cultivating and maintaining relationships with current and prospective investors and new product development. Previously she worked as an analyst on the investor relations team at Developing World Markets, an investment bank managing microfinance private debt and equity funds. In addition, she worked a number of international nonprofits, including Safe Water Network, The Africa-America Institute, and Accion International, in fundraising and communications roles. Rachel holds an M.A. in international affairs from Columbia University and a B.A. from Colby College.

DON SHAFFER
President & CEO, RSF Social Finance
Don Shaffer is President & CEO of RSF Social Finance. Under Don’s leadership, RSF’s total assets have grown 40% in the past three years to over $160 million. As leaders in social finance, Don and the team at RSF seek to transform the way the world works with money by asking the question: “How can we model financial transactions that are direct, transparent, and personal, based on long-term relationships?” Don has been a social entrepreneur for many years, growing a for-profit education business, a software company, and a sporting goods manufacturer, in addition to a non-profit, the Business Alliance for Local Living Economies. Don grew up in central New Jersey and comes from a long ancestry of Quaker farmers and small businesspeople in and around Philadelphia. He lives in Berkeley, CA, with his wife and their two children. Don graduated from Cornell University with a B.A. in American history.

MORGAN SIMON
Senior Advisor, Pi Investments
Morgan has spent the last decade engaged in impact investment, emphasizing community accountability and ownership. She currently co-leads Pi Investments, building a 100% impact portfolio with an emphasis on community empowerment and environmental efficiency. In that capacity, she evaluates investments across asset classes, including early-stage investments, private equity and debt, and real assets. Morgan is a co-founder of Tonic, where she served as founding CEO from 2010-2013. She is on the investment committee for The Working World, a fund for worker-owned cooperatives in the U.S., Argentina and Nicaragua, and chairs the board of ROC UNITE, organizing 10,000 restaurant workers nationwide. She is also a founder and chair of Transform Finance, bridging impact investment and social justice (www.transformfinance.org).

Previously, as the founding Executive Director of the Responsible Endowments Coalition, Morgan brought together 100 colleges and universities, helping to move their $200 billion in endowment dollars towards impact investment. Morgan has also worked with grassroots organizations and the United Nations Development Program (UNDP) in Mexico, Honduras and Sierra Leone, and in domestic microfinance with Women’s Initiative for Self Employment. She received a B.A with high honors in economics and political science from Swarthmore College, and serves as an Adjunct Professor at Middlebury College’s graduate school program.

KATE SIMPSON
Research Consultant, Confluence Philanthropy
Kate earned a Master’s degree from Stanford University in international comparative education, where she was able to focus her research on the strategies used by the business community to influence public education policy. A longstanding interest, Kate is excited to continue to explore the ways in which capital can be harnessed to positively influence environmental and social issues.

Kate co-authored a report on multinational corporations and their impact on human rights through an internship with Trillium Asset Management. She was the lead researcher for the article, “100 Best Companies to Work for in America.” Further cementing the connection between financial performance and non-financial measures of success, Kate screened client portfolios based on environmental, social and governance criteria and assisted in providing research and support for several shareholder resolutions at Progressive Asset Management. Kate is also a volunteer teacher to the refugee and asylum-seeker population in Portland, ME. She developed an interest in working with other cultures while teaching English abroad at the International School in Geneva, Switzerland, and in Prague. She feels fortunate to be able to raise her three children in Maine and thoroughly enjoys the thriving local food scene.

RAOUL SLAVIN
Managing Director, Treehouse Investments, LLC
Raoul is a Managing Director at Treehouse Investments, LLC, a privately owned impact investment firm with a primary focus on alternative energy, clean-tech and gender inclusion. He is also Executive Director of Aspenall Energies, LLC, which develops and owns community-scale renewable energy projects. Raoul has a BA from St John’s College in Santa Fe and a Juris Doctor from Columbia University.

TIM SMITH
Director of ESG Shareowner Engagement, Walden Asset Management
Tim Smith serves as Director of ESG Shareowner Engagement at Walden Asset Management, a division of Boston Trust & Investment Management Company. Walden has been a leader in sustainable and responsible investing (SRI) since 1975. As of June 30, 2015, Walden managed approximately $2.7 billion in assets for individual and institutional clients. Mr. Smith joined Walden in 2000 to lead Walden’s ongoing shareholder engagement program to promote greater corporate leadership on ESG issues. This includes company dialogues, shareholder proposals, proxy voting, and public policy advocacy. One of Walden’s priority issues is Board diversity pursued through letters, company dialogues, shareholder resolution and proxy voting. Previously, Mr. Smith served as executive director of the Interfaith Center on Corporate Responsibility (ICCR) for 24 years.
MARK J. SPALDING  
President, The Ocean Foundation  
Mark J. Spalding has been the President of The Ocean Foundation since its founding 13 years ago. Under his leadership, it has grown exponentially, with annual budget growing from $200,000 to $7 million, as he prioritized its focus on steering the human relationship with the sea to a brighter future through diverse, carefully chosen strategies and projects. Mark is the advisor to the Rockefeller Ocean Strategy (a pioneering ocean-centric investment fund), and designed the first-ever blue carbon offset program, SeaGrass Grow. Mark is serving on the Sargasso Sea Commission. He is a Senior Fellow at the Center for the Blue Economy at the Middlebury Institute of International Studies. From 1994 to 2003, Mark was the Director of the Environmental Law and Civil Society Program, and Editor of the Journal of Environment and Development, at the University of California at San Diego’s Graduate School of International Relations & Pacific Studies (IR/PS). He is a graduate of the British School of Motor Racing.

CHITRA STALEY  
Managing Director and Partner, Beacon Pointe Wealth Advisors  
Chitra Staley brings over 30 years of experience in financial advisory and portfolio management. Prior to joining Beacon Pointe Wealth Advisors, Chitra founded TPW Financial, and was the CIO of Mintz Levin Financial Advisors and President of Staley Advisors. In these roles, she managed portfolios, created investment policies and oversaw asset allocation. Prior to establishing Staley Advisors, Chitra served as CIO for Crosby Advisors, the family office of the founder of Fidelity Investments. At Crosby, Chitra managed the family’s personal investment portfolios and evaluated global investment opportunities, particularly contrarian and non-traditional investments. Prior to her work at Crosby, Chitra was a portfolio manager at State Street Bank & Trust Co. and developed expertise in valuing illiquid assets, such as family businesses, real estate investments and private equity. Chitra has deep expertise in impact investing. She was a portfolio manager at Boston-based Trillium Asset Management, the oldest and largest independent investment management firm in the U.S. solely devoted to sustainable and responsible investing. In addition, she served as Board Chair of the Jessie Smith Noyes Foundation, a New York-based foundation working to protect communities from toxic waste dumping and to promote sustainable agriculture. Chitra is currently the Chair of the Investment Advisory Committee of the Brookline Public Library, the Chair of the Finance Committee of the Pomroy Foundation, and on the board of the Pro Arte Chamber Orchestra. She received her BA from Smith College and her MS from the University of Massachusetts. Chitra received her MBA from Simmons School of Management, and later earned the Chartered Financial Analyst (CFA) and Certified Financial Planner (CFP) designations.

ANNE STETSON  
Trustee, John Merck Fund  
Anne Stetson is an international lawyer and impact investor. She is a Senior Fellow and Visiting Scientist at Harvard University’s FXB Center for Health and Human Rights, where she directs the program on human trafficking. Anne serves as president of Lighthouse Global Consulting, a strategic advisory firm to non-profits and foundations working to address issues related to global poverty. An impact investing pioneer, Anne has developed impact investments, co-founded an impact investing advisory firm, and advocated in writing and speaking for the field. Anne serves as a trustee and as treasurer of the John Merck Fund, and as a director of the Lookout Foundation. She is a member of the Council on Foreign Relations. She has published articles and books in the areas of impact investing, investing in developing markets, and human rights.

AARON TANAKA  
Director, Center for Economic Democracy  
Aaron Tanaka is a community organizer, finance activist and cook. He is the director of the new Center for Economic Democracy, a grassroots capacity building organization resourcing long-term movement building strategies to transform American capitalism. He was the founding Executive Director of the Boston Workers Alliance, a grassroots community organization best known for helping to “Ban the Box” in Massachusetts. He was also the first Managing Director of the Boston Impact Initiative, Boston’s first place-based impact investment fund, where he currently serves as Senior Advisor. Aaron is a current BALLE Fellow, former Green for All Fellow, co-chair of the New Economy Coalition and the Asian American Resource Workshop, and worker-owner at Olio Culinary Collective. He is a graduate of Harvard College (BA) and S. New Hampshire University (MS).

LUCA TORRE  
Co-Founder and Co-CEO, GAWA Capital  
Luca is the co-founder and co-CEO of GAWA Capital, Spain’s leading impact investment firm, with more than €45 million under management in financial inclusion. He has spent most of the last 15 years working with and advising microfinance and financial institutions and SMEs. Prior to founding GAWA, he was an investment banker for Credit Suisse’s Latin America Financial Institutions Group, working on a variety of microfinance-related transactions. Luca previously worked in India for Annapurna, a cooperative microfinance bank, and in Cambodia for the International Finance Corporation, supporting local social entrepreneurship. He began his career at the Boston Consulting Group, focusing on the financial services sector and working specifically with large Italian banks, to better serve their SME segments. Luca received a BSc, First Class Honours, from the University of Brighton, England, and an MBA from The Kellogg School of Management at Northwestern University, where he was named a 2006 Siebel Scholar. For several years, he also chaired the Credit Committee of the Lower East Side People’s Credit Union, in New York City. Luca currently lives in Madrid, where he enjoys cycling and mushroom-hunting with his French-born wife and two toddler boys.

ALEXIE M. TORRES-FLEMING  
Executive Director, Access Strategies Fund  
Alexie is an activist, community organizer, advocate and urban planner from the South Bronx, New York with over 20 years of experience in social justice leadership in low-income communities of color. She also brings 10 years’ experience in the philanthropic sector as a foundation executive director, board member, and senior fellow. Her life’s work has been dedicated to the intersections of faith, economic and racial justice, democratic change, youth organizing, women and supporting the leadership of communities of color. Alexie came to Massachusetts in 2014 as Harvard University Loeb Fellow where she explored how community organizing can inform urban planning strategies.

A nationally sought-after speaker, Alexie has received numerous awards throughout her career, including the 2008 Rockefeller Foundation’s Jane Jacobs Medal for New Ideas and Activism; The Caritas Medal from the Vincentian Society for her service to the poor; and the “Servitor Pacis—Servant of Peace” award from the Permanent Observer Mission of the Vatican to the United Nations. In January 2009, Alexie was named one of “50 Visionaries Who Are Changing Your World” by the Utne Reader. She is founder of the Multicultural Leadership Collaborative, an international network creating change for communities of color and a Christian Center for Social Justice. She is also a current BALLE Fellow, former Green for All Fellow, co-chair of the New Economy Coalition and the Asian American Resource Workshop, and work-er-owner at Olio Culinary Collective. He is a graduate of Harvard College (BA) and S. New Hampshire University (MS).

SANDRA A. URIE  
Chairman & CEO, Cambridge Associates  
Sandra Urie, Cambridge Associates’ Chairman and CEO, has been with the firm since 1985. Prior to assuming the CEO position, she was the COO with responsibility for directing the firm’s consulting practice. Prior to assuming her management positions, she was an active member of the investment staff, providing investment advisory services to a number of endowed nonprofit institutions and private clients, with a specialty in long-range financial planning. Before Sandy joined Cambridge Associates, she worked as a member of the faculty at Phillips Academy (Andover) where she taught...
Russian language and served on the admissions office staff. Sandy was a member and vice-chair of the Investors’ Committee of the U.S. President’s Working Group on Financial Markets (2007-2010) focusing on defining best practices in alternative assets, including due diligence and ongoing oversight. She currently serves on the Board of Overseers at Boston Symphony Orchestra, the Board of Overseers at Boston Lyric Opera, Board of Directors at Social Finance, Inc., Stanford Management Company Board of Directors, the Global Board of 100 Women in Hedge Funds as vice chair, and the Board of The Plymouth Rock Company. In 2015 Sandy received an Investor Lifetime Achievement Award from Institutional Investor and more recently was an honoree at theYWCA Academy of Women Achievers. Sandy graduated from Stanford University and received an MPPM from the Yale School of Organization and Management.

FRANCESCA VIETOR
Program Director, Environment, Public Policy, and Civic Engagement, The San Francisco Foundation
Francesca focuses on efforts to improve the environmental health of vulnerable communities, build resilience in the face of the changing climate, and tackle economic inequality and wealth disparity in the Bay Area. Francesca is also a Commissioner on the San Francisco Public Utilities Commission, where she leads policymaking for the City and County of San Francisco’s water, wastewater, and municipal power services. Before that, she was Executive Director of the Chez Panisse Foundation, where she advanced nutrition education and food justice issues. Previously, she was President of the Urban Forest Council, President of the Commission on the Environment, and the Chair of Mayor Newsom’s Environmental Transition Team. She has worked for several non-profits, including Rainforest Action Network and Greenpeace, and she serves on the boards of SPUR and Environmental Working Group.

SILDA WALL SPITZER
Director & Principal, NewWorld Capital Group
Silda Wall Spitzer is Director & Principal at NewWorld Capital Group, a private equity firm investing in growth equity and infrastructure projects within Environmental Opportunities markets (energy efficiency, clean energy, water, waste-to-value and environmental products/services).

Ms. Wall Spitzer’s professional career has spanned the public, private and nonprofit sectors. Before joining NewWorld, she was Managing Director at Metropolitan Capital Advisors, a women-owned investment firm, and First Lady of New York State, with initiatives promoting green buildings, alternative energy, local food sources and engaging constituents to create livable communities and sustainable jobs. Previously a practicing attorney for a decade, Ms. Wall Spitzer specialized in M&A and corporate finance at Skadden and later at Chase Manhattan Bank, where she structured and negotiated complex transactions. Mother of three, Ms. Wall Spitzer serves on the Urban Green Council Board as Vice Chair, Ceres President’s Council, and Sustainable Endowments Institute Advisory Board and has co-authored several essays, including “Impact Investing: A Trade Up, Not a Trade Off.” Member of the Council on Foreign Relations, Economic Club of New York, and NY State and City Bar Associations, she holds a JD from Harvard Law School and a BA summa cum laude and Honorary Doctorate from Meredith College.

DORIAN WARREN
Fellow, Roosevelt Institute
Dorian T. Warren is a Fellow at the Roosevelt Institute and Board Chair of the Center for Community Change. A scholar of inequality and American politics, he taught for over a decade at the University of Chicago and Columbia University, where he was Co-Director of the Columbia University Program on Labor Law and Policy. A native Chicagoan, Warren received his B.A. from the University of Illinois and his M.A. and Ph.D. in political science from Yale University.

Warren has worked with several national and local organizations including the Leadership Conference on Civil and Human Rights, American Rights at Work/ Jobs with Justice, AFL-CIO, CTW, UNITE-HERE, SEIU, UFCW, Steelworkers, and the NGTLF Policy Institute, among others. He currently serves on several boards including Alliance for a Greater New York, Working Partnerships USA, the Model Alliance, the Workers Lab, and The Nation Magazine Editorial Board. He is also Co-Chair of the AFL-CIO’s Commission on Racial Justice Advisory Council.

As a commentator on public affairs, Warren has appeared regularly on television and radio including NBC Nightly News, ABC, MSNBC, CNN, CNBC, BET, BBC, NPR, Bloomberg, & NY1, among other outlets. In 2015 he was the Host and Executive Producer of “Nerding Out” on MSNBC’s digital platform, shift.msnbc.com.

ELIZABETH WARREN
U.S. Senator, Massachusetts
Elizabeth Warren, a fearless consumer advocate who has made her life’s work the fight for middle class families, was elected to the U.S. Senate on November 6, 2012, by the people of Massachusetts. Elizabeth is recognized as one of the nation’s top experts on bankruptcy and the financial pressures facing middle-class families. The Boston Globe has called her “the plainspoken voice of people getting crushed by so many predatory lenders and under regulated banks.” She is widely credited for the original thinking, political courage, and relentless persistence that led to the creation of the Consumer Financial Protection Bureau. President Obama asked her to set up the new agency to hold Wall Street banks and other financial institutions accountable, and to protect consumers from financial tricks and traps often hidden in mortgages, credit cards and other financial products.

GERALDINE F. WATSON
Vice President for Finance & Operations, Rockefeller Brothers Fund
Geraldine F. Watson has served as Vice President for Finance and Operations at the Rockefeller Brothers Fund since 2006, overseeing the finance, accounting, information technology, human resources, and operations functions of RBF, as well as the Rockefeller Family Fund, the David Rockefeller Fund, and several of its affiliates. Ms. Watson joined RBF in 1994 as comptroller, directing the financial reporting responsibilities for RBF, the RFF, the DRF, along with the Asian Cultural Council and the Rockefeller Philanthropy Advisors. From 1989 through 1994, Ms. Watson was an independent consultant, providing financial and tax services to individuals, small businesses, and nonprofit organizations. Prior to 1989, Ms. Watson served as an audit manager at Price Waterhouse. She currently chairs the board of Confluence Philanthropy, and serves as a board member and chair of the audit committee of Philanthropy New York. Ms. Watson also serves on the board of The Interchurch Center, chairs its finance committee, and is a member of its compensation and personnel committee. Ms. Watson received a B.S. from Fairfield University and attained her CPA classification shortly thereafter.

MATTHEW WEATHERLEY-WHITE
Managing Director, The Caprock Group
Shaping The CAPROCK Group’s impact investing platform, Matthew is a sought-after speaker and thought leader in the discipline. In addition to keynoting the 2013 European Commission’s Annual Award for Social Innovation, Matthew has guest lectured on sustainable business management and non-financial value creation at Harvard, Tuck, Kellogg, Booth and the American University in Paris business schools, has presented at conferences throughout the U.S. and Europe, and serves as a strategic advisor to several impact investing funds. More recently, he successfully shepherded two pieces of legislation through the Idaho Statehouse: the first authorizing pay-for-success contracting and the second according legal status to businesses structured as benefit corporations. Prior to co-founding The CAPROCK Group, Matthew was a partner in The Owyhee Group, a boutique advisory team within Smith Barney. During his thirteen years with the company, he was a member of Citigroup’s elite Leadership Development Program and helped craft the firm’s private wealth management platform. His term as Chairman of the Board for the Lee Pesky Learning Center having ended in 2011, he continues to serve the organization he helped launch 18 years ago. Matthew is a graduate of Dartmouth College and Phillips Academy, Andover. When not working, Matthew can usually be found outside, running, skiing,
mountaineering, cycling, and generally encouraging his daughter to enjoy wilderness adventure with the same irrational exuberance as her father.

MAYA WINKELSTEIN
Executive Director, Open Road Alliance

Maya Winkelstein is Executive Director of Open Road Alliance, where she is responsible for the organization’s overall investment strategy including finding new ways to deploy capital to achieve maximum social returns. Open Road fills a market demand for fast, flexible contingency funding in the non-profit sector. Winkelstein has worked with Open Road since the organization’s inception in 2012. Prior to Open Road she worked as an associate director with the consulting firm, williamsworks. Former clients include Eastern Congo Initiative, Nike Foundation, PATH, Tostan, and TOMS Shoes. Former affiliations also include The Corporate Council on Africa, International Institute for Strategic Studies (IISS), the Institute of National Strategic Studies (INSS) at National Defense University (NDU), and Exclusive Analysis Ltd.

Winkelstein holds a B.A. in political science from the University of Michigan, an MSc in International Relations from the London School of Economics, and a Diplôme Internationale from Sciences-Po in Paris.

MICHAEL WHELCHEL
Co-Founder & Managing Partner, Big Path Capital

Michael Whelchel brings over two decades of experience financing, acquiring, selling, growing, and operating growth-oriented companies to Big Path Capital. Prior to co-founding Big Path Capital, he worked with both startups and later-stage companies in a range of industries, playing key roles in the early development of two private equity firms focused on growth-orient ed companies. Michael managed the full investment process, including sourcing, deal structure, due diligence, negotiations, financing, portfolio management, sales on exit, and fund raising.

In 2007, with the old economy at a dead end, Michael established Big Path Capital to advance an expansive economy built on natural, social, and financial capital. In partnership with Shawn Lesser, Michael has founded a number of first of their kind initiatives, all of which demonstrate SmarterMoney+ - maximize return, maximize impact. Those include the Five Fund Forum, Impact Capitalism Summit, and Impact & Sustainable Trade Missions. Michael received his BA summa cum laude, Phi Beta Kappa from the University of the South in Sewanee, TN, and received a joint MBA and MEM (Master of Engineering Management) from the Kellogg School of Management, Northwestern University. Michael is an advisory board member of the Croatian Institute and the Babson Center for Global Commerce and is a member of the Social Venture Network and Net Impact.

ED WHITFIELD
Co-Managing Director, Fund 4 Democratic Communities

Ed Whitfield is a long time social justice activist. In his youth, he was involved in anti-Vietnam War activism and school desegregation in the south before becoming a leader in the struggle for Black Studies in college in the late 1960s. After leaving Cornell University, where he studied philosophy and mathematics, Ed taught at Malcolm X Liberation University in North Carolina. That experiment in alternative independent education failed in the early 1970s due to a lack of funding and confused direction. Ed became active in local community struggles around housing, labor, education and peace while working full time in industry for 35 years. In 2007, Ed co-founded the Fund for Democratic Communities (F4DC), along with Marnie Thompson. In 2011, they initiated the Southern Grassroots Economies Project (SGEP), working to build up southern economies rooted in community ownership and democratic access to capital. Most recently they have been working to build the Southern Reparations Loan Fund (SRLF) along with other southern grassroots groups. This is developing as a part of a national effort to develop a Financial Cooperative, based on principles of non-extractive finance. Ed describes himself as a musical autodidact and iconoclast, playing and building a number of musical instruments.

ADAM WOLFENSOHN
Investment Committee Member, Rockefeller Brothers Fund

Adam Wolfensohn is Co-Managing Partner of Encourage Capital, an asset management firm focused on profitable and strategic investments to solve critical social and environmental problems. The organization was formed by the recent merger of Wolfensohn Fund Management and EKO Asset Management. A unique partnership of disciplined investors and creative problem-solvers, the new firm is already working with major asset owners to deploy investment capital to solve problems like global ecosystem decline, climate change, and bringing financial services to the world’s poor. Prior to 2015 Mr. Wolfensohn was a Partner at Wolfensohn Fund Management and a member of the Investment Committee. Since 2002, he has also managed the Wolfensohn family office cleantech and environmental markets strategies where he is an active investor in sustainability oriented funds and companies and for which he serves on the board of EKO asset management. From 2003 to 2006, he produced the climate change documentary, “Everything’s Cool,” that debuted at the Sundance Film Festival in 2007. From 2002 to 2003, he managed pioneering work with Conservation International and major music tours to offset their emissions through avoided deforestation projects. Mr. Wolfensohn is a frequent speaker on sustainability and impact investment.

DAVID WOOD
Director, Initiative for Responsible Investment, Harvard Kennedy School

David Wood directs IRI’s research and field-building work on responsible investment across asset classes, and currently manages projects on RI strategy with pension fund trustees, mission investing by foundations, the changing landscape of community investing in the U.S. and impact investing and public policy. He holds a Ph.D. in history from The Johns Hopkins University. Contact him at david_wood@hks.harvard.edu.

CHRISTIE ZARKOVICH
Senior Investment Professional, Perella Weinberg Partners

Ms. Christie Zarkovich is a senior investment professional at Perella Weinberg Partners’ Outsourced Chief Investment Officer platform where she serves as a member of the Investment Committee and leads mission aligned and impact research and strategy across asset classes. Before joining Perella Weinberg Partners, Ms. Zarkovich was a Senior Vice President and Chief Investment Officer at EverBank Wealth Management. She also served as a senior member of the investment organizations at the William and Flora Hewlett Foundation, the A.I. duPont Testamentary Trust, and the University of California Berkeley Endowment. Christie has been a member of the Investment Committee. Since 2002, she has also managed the Wolfensohn family office cleantech and environmental markets strategies where he is an active investor in sustainability oriented funds and companies and for which he serves on the board of EKO asset management. From 2003 to 2006, he produced the climate change documentary, “Everything’s Cool,” that debuted at the Sundance Film Festival in 2007. From 2002 to 2003, he managed pioneering work with Conservation International and major music tours to offset their emissions through avoided deforestation projects. Mr. Wolfensohn is a frequent speaker on sustainability and impact investment.

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MICHAEL WHELCHEL
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In 2007, with the old economy at a dead end, Michael established Big Path Capital to advance an expansive economy built on natural, social, and financial capital. In partnership with Shawn Lesser, Michael has founded a number of first of their kind initiatives, all of which demonstrate SmarterMoney+ - maximize return, maximize impact. Those include the Five Fund Forum, Impact Capitalism Summit, and Impact & Sustainable Trade Missions. Michael received his BA summa cum laude, Phi Beta Kappa from the University of the South in Sewanee, TN, and received a joint MBA and MEM (Master of Engineering Management) from the Kellogg School of Management, Northwestern University. Michael is an advisory board member of the Croatian Institute and the Babson Center for Global Commerce and is a member of the Social Venture Network and Net Impact.

ED WHITFIELD
Co-Managing Director, Fund 4 Democratic Communities

Ed Whitfield is a long time social justice activist. In his youth, he was involved in anti-Vietnam War activism and school desegregation in the south before becoming a leader in the struggle for Black Studies in college in the late 1960s. After leaving Cornell University, where he studied philosophy and mathematics, Ed taught at Malcolm X Liberation University in North Carolina. That experiment in alternative independent education failed in the early 1970s due to a lack of funding and confused direction. Ed became active in local community struggles around housing, labor, education and peace while working full time in industry for 35 years. In 2007, Ed co-founded the Fund for Democratic Communities (F4DC), along with Marnie Thompson. In 2011, they initiated the Southern Grassroots Economies Project (SGEP), working to build up southern economies rooted in community ownership and democratic access to capital. Most recently they have been working to build the Southern Reparations Loan Fund (SRLF) along with other southern grassroots groups. This is developing as a part of a national effort to develop a Financial Cooperative, based on principles of non-extractive finance. Ed describes himself as a musical autodidact and iconoclast, playing and building a number of musical instruments.

ADAM WOLFENSOHN
Investment Committee Member, Rockefeller Brothers Fund

Adam Wolfensohn is Co-Managing Partner of Encourage Capital, an asset management firm focused on profitable and strategic investments to solve critical social and environmental problems. The organization was formed by the recent merger of Wolfensohn Fund Management and EKO Asset Management. A unique partnership of disciplined investors and creative problem-solvers, the new firm is already working with major asset owners to deploy investment capital to solve problems like global ecosystem decline, climate change, and bringing financial services to the world’s poor. Prior to 2015 Mr. Wolfensohn was a Partner at Wolfensohn Fund Management and a member of the Investment Committee. Since 2002, he has also managed the Wolfensohn family office cleantech and environmental markets strategies where he is an active investor in sustainability oriented funds and companies and for which he serves on the board of EKO asset management. From 2003 to 2006, he produced the climate change documentary, “Everything’s Cool,” that debuted at the Sundance Film Festival in 2007. From 2002 to 2003, he managed pioneering work with Conservation International and major music tours to offset their emissions through avoided deforestation projects. Mr. Wolfensohn is a frequent speaker on sustainability and impact investment.

DAVID WOOD
Director, Initiative for Responsible Investment, Harvard Kennedy School

David Wood directs IRI’s research and field-building work on responsible investment across asset classes, and currently manages projects on RI strategy with pension fund trustees, mission investing by foundations, the changing landscape of community investing in the U.S. and impact investing and public policy. He holds a Ph.D. in history from The Johns Hopkins University. Contact him at david_wood@hks.harvard.edu.

CHRISTIE ZARKOVICH
Senior Investment Professional, Perella Weinberg Partners

Ms. Christie Zarkovich is a senior investment professional at Perella Weinberg Partners’ Outsourced Chief Investment Officer platform where she serves as a member of the Investment Committee and leads mission aligned and impact research and strategy across asset classes. Before joining Perella Weinberg Partners, Ms. Zarkovich was a Senior Vice President and Chief Investment Officer at EverBank Wealth Management. She also served as a senior member of the investment organizations at the William and Flora Hewlett Foundation, the A.I. duPont Testamentary Trust, and the University of California Berkeley Foundation. In these roles, she focused on a broad range of marketable and private investment strategies, as well as evaluation of portfolio asset allocation and risk management. She began her career as a research analyst at the New York Mercantile Exchange. Ms. Zarkovich received a Bachelor of Science in Economics from The Colorado School of Mines. She also received a Master’s of Science in finance and an MBA from The University of Denver. Ms. Zarkovich holds the Chartered Financial Analyst (CFA) designation.
WORKING GROUPS
WORKING GROUPS, LEARNING COHORTS, AND SPECIAL INITIATIVES
In addition to providing more than 20 events per year through our membership programming, Confluence has contributed to the growth of the field with the creation of four thematic working groups. They’ve crystallized from among our membership, largely at the initiative of motivated individuals.

WE THANK THEM FOR THEIR LEADERSHIP!

CLIMATE SOLUTIONS COLLABORATIVE (C2C)
Over the past five years, Confluence has led more than 40 climate-related learning events to spur discussion and interest in climate financing. C2C brings together the combined force of Confluence Philanthropy and CREO Syndicate memberships — together representing more than $150 billion of investable capital. The goal of this commitment is to accelerate investments in climate solutions through investor sharing and collaboration.

MISSION FISH WORKING GROUP
The Mission Fish Working Group focuses on mission-related investing in sustainable fisheries and food systems. The educational component of the program engages grantmakers and individual donors in a series of webinars and in-person roundtable discussions in order to build an effective community of practice. Mission Fish is visibly building alternative finance streams that support the sustainable fisheries and food systems industry region by region. The group is currently working on a special place-based investment initiative in the Gulf of Maine region and exploring interventions in the aquaculture industry.

NATIVE GREEN LEARNING CIRCLE
As one of Confluence’s first working groups, participants share best practices and lessons learned when considering community development investments within indigenous communities. The group convenes foundations and donors making grants to tribal communities to explore the intersection of impact investing and community development in Native America. Members work collaboratively on field-building projects and explore opportunities for co-investment.

WATER INVESTORS WORKING GROUP
This group of committed foundations engages in roundtable discussions to combine their investment interests and grantmaking in water sustainability. They work throughout the year to discover the range of investment vehicles that can be applied in this field. The group is organizing its first ever “Western Water Briefing: Strategies for Resilience” to address the crisis of drought and water resilience and explore opportunities to co-invest and build the field of investing in water sustainability more broadly. The Briefing will be held on August 2-3, 2016, in San Diego, CA.

Many forms of Government have been tried, and will be tried in this world of sin and woe. No one pretends that democracy is perfect or all-wise. Indeed it has been said that democracy is the worst form of Government except for all those other forms that have been tried from time to time.

- WINSTON CHURCHILL
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ACKNOWLEDGMENTS

The Confluence Practitioners Meeting is created through a unique democratic process. Members of the Practitioners Program, along with their investment advisors, propose concepts that are then voted on by the Practitioners Program members. Sessions receiving the highest number of votes are raised to plenary status, while other sessions receiving a majority of the votes become small sessions. Those individuals with selected sessions are invited to then help to plan that session.

We would like to both congratulate and thank those members and investment advisors who have helped to shape the Sixth Annual Practitioners Gathering, as well as others, whom we have relied upon for the vision and expertise. We look forward to our best event yet!

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