

Michael J. Greis, CFA

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Strategy and Finance for a Sustainable World

SUMMARY & CORE SKILLS

Sustainable Investing professional helping investment professionals and investors to advance sustainable investing through education, events, projects, and marketing

Experienced team leader with a strong history of building and managing successful collaborative teams across multiple organizations and within large organizations.

Business Development executive skilled at creating both innovative marketing campaigns and strong client relationships

Persuasive public speaker and presenter engaging a wide variety of audiences with enthusiasm and passion

PROFESSIONAL EXPERIENCE

RIVERBEND ADVISORS, Needham, MA. Principal, 2002 – Present

A consulting firm leveraging expertise in finance, technology, and policy to create and execute projects that advance the sustainable economy. *Selected current and recent projects:*

- ◆ **"Sustainable Investing: Moving into the Mainstream"** – Created successful Boston Security Analysts Society Sustainable Investing Seminars beginning in 2013. This annual full-day event has consistently received outstanding feedback, with attendance more than doubling to 150. 2017 session information and program at <http://tiny.cc/bsassi>.
- ◆ **Seeking investments in solar loan portfolios** from community banks for leading Boston-area solar project development and residential financing company. Current.
- ◆ **Brand-building and prospect identification** for launch of US offerings by European ESG-Quant investment management firm. Current.
- ◆ **Sustainable Accounting Standards Board (SASB)** – Collaborated on development and hosting of first practitioners' workshop targeting CFA charterholders. Subject-matter expert for FSA Level-II Exam standards-setting process. 2016.
- ◆ **Solar PV Business Development** – Identified and developed municipal and institutional prospects for solar developer. Built deep relationships to qualify and advance multiple 100-1000 kW opportunities. 2014-2015.
- ◆ **"Getting Buy-In from the Market Analyst: How to Connect ESG Performance with Traditional Portfolio Management"** – Developed and moderated panel session for Skytop Strategies ESG Summit, June 2015.
- ◆ **Municipal Solar installation** – Initiated and spearheaded successful multi-year effort (2011-16) to install 3.6MW solar PV system on capped municipal landfill in Needham, MA.

- ◆ **Research and interviews** about responsible investment systems-level impacts and frameworks, for Steve Lydenberg's recent white papers on developing new approaches to these challenges. 2014-2015.
- ◆ **Solarize Needham** – Local participation in Solarize Mass. Created RFP response and marketing strategy for a team of municipal and community organizations that led to over 130 systems installed. 2013-2014.
- ◆ **SEC Climate Change Disclosure Seminars** – Produced two successful seminars for the NY Society of Security Analysts (2011) and the Boston Security Analysts Society (2010) that highlighted the opportunities for investors, investment managers, and analysts to use these guidelines for market advantage.

NORTHEASTERN UNIVERSITY, Boston, MA. *Dir. of Corporate Relations, 2000 – 2002*

Led outreach for corporate partnerships in biotechnology, and managed the initiative's advisory Board. Achieved \$12 million (+25%) in corporate support for the program.

INTERNATIONAL BUSINESS MACHINES (IBM), 1980 – 2000

Began career in technical sales, and was promoted into management with progressive responsibility for creating and expanding strategic research partnerships in cutting-edge technologies.

Director of University Relations, Yorktown Heights, NY (1996 – 2000)

Created a new University Relations organization and global strategy, establishing a strong positive identity for IBM in universities worldwide. Awarded \$35 million in grants to leading research universities worldwide with participation from all major IBM R&D organizations, generating increased business, research projects, and hiring.

Built new strategic partnerships with major universities by identifying emerging areas likely to generate significant new business for IBM, such as computational biology, and Internet business.

Member of IBM's Research Management Committee, the Technical Leadership Committee, and the Deep Computing Institute internal executive advisory board. Appointed as IBM's representative to the Government-University-Industry Research Roundtable (GUIRR).

Research Segment Leader, Higher Education Industry, Waltham, MA (1994 – 1996)

Created the plan and benchmarks for the Research Computing segment, the first in the higher education industry's sales organization. Built a worldwide team, drove +54% YTY increase in research sales, and awarded 1995 Golden Circle.

Previous IBM positions (1980 – 1993)

Consulting Market Support Representative (Waltham, MA, 1991-1993)

Systems Engineering Manager (Boston, MA, 1988-1990)

Systems Engineering and Technical Sales (Norwalk, CT and Boston, MA, 1980-1987)

EDUCATION & CERTIFICATIONS

Fundamentals of Sustainability Accounting (FSA) credential, SASB.

CFA Charterholder, CFA Institute.

M.S. Finance, BOSTON COLLEGE Carroll School of Management, 2005

B.A. Molecular Biophysics and Biochemistry, YALE UNIVERSITY, 1980

PROFESSIONAL ASSOCIATIONS

CFA Institute and CFA Society Boston (formerly **Boston Security Analysts Society**), Member *Programs and Education Advisory Council* – 2016 - Present

Global Equities Program Subcommittee – 2011-2016; Co-chair 2012-2014, Chair 2014-2016

Socially Responsible Investing Program Subcommittee – 2008-2011; Chair, 2010-2011

BASIC (Building a Sustainable Investment Community; Boston) – Events Chair, 2015-2016

Northeast Clean Energy Council (Boston) – Member; Policy Committee, Solar Working Group

Newton-Needham Chamber of Commerce – Environment Committee, Green Business Awards

RECOGNITION

Harold Wilkinson Award for meritorious service to the Needham Exchange Club, 2010.

Needham Channel Founder's Award, 2010.

EPA Environmental Merit Award, 2010 (Green Needham Collaborative)

IBM – Golden Circle, Hundred Percent Club (3 times), Systems Engineering Recognition Symposium, Regional Excellence Award

CIVIC & PUBLIC SERVICE

Needham School Committee – Elected 2005; Chair 2008-2009, 2014-2015. Budget, contract negotiations, and finance

Green Needham Collaborative – Co-founder/Chair, Current. Community partnerships for sustainability

Needham Community TV Development Corp. – President, Current. Nonprofit public-access cable TV.

Town Meeting Representative, Town of Needham, MA – Elected 1995

Needham Great Hall Performance Foundation – Co-President, 2016-present; Founding Member and Board of Directors, 2012-present

Needham Exchange Club – Member since 2006.

INTERNATIONAL

Business experience and long-term personal relationships, especially in Europe and Asia

Conversational German, French and Japanese