

Michael J. Greis, CFA

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Mainstreaming Sustainable Investing

SUMMARY & CORE SKILLS

Sustainable Investing professional helping investment professionals and investors advance ESG and sustainability goals through education, events, projects, and marketing

Sustainable Investing domain expert with many years' experience interpreting and promoting the Sustainable Investing value proposition, as it continuously evolves

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

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

Experienced team leader with a strong history of building and managing successful collaborative teams within large organizations and across public and private sectors

Nonprofit Leader with a strong track record establishing and managing successful organizations

PROFESSIONAL EXPERIENCE

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

Thought leader and subject matter expert in sustainable investing and the transition to a clean energy economy. Leveraging expertise in finance, technology, and public policy to create and execute projects that advance the sustainable economy and the continuing evolution of the sustainable investing value proposition. *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 tripling. Upcoming and Series information at <http://tiny.cc/bsassi>.
- ◆ **Mainstreaming Sustainable Investing** – Author/Editor of CFA Institute Research Foundation publication (October 2018, <http://tiny.cc/msibrief>) with articles by Andreas Feiner, Andreas Hoepner Steve Lydenberg and George Serafeim. This brief showcases innovations in the field, and its wide-ranging impact on the investment profession.
- ◆ **Legislative Advocacy for Clean Energy** through the Northeast Clean Energy Council and directly with MA State Legislators (<https://riverbendadvisors.com/blog/celeg>).
- ◆ **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.
- ◆ **Seeking investments in solar loan portfolios** from community banks for leading Boston-area solar project development and residential financing company.

- ◆ **Brand-building and prospect identification** for launch of US offerings by European ESG-Quant investment management firm.
- ◆ **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.

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, then 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 e-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 Management & Technical Sales (Norwalk, CT and Boston, 1980-1990)

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, Member

Sustainable Investing Program Committee – Founder & Chair; established 2013

Diversity, Equity & Inclusion Programs Committee – Co-Chair; established as Women’s Initiative Programs Committee 2018

Programs and Education Advisory Council – 2016-Present

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

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

Conservation Award, National Society of the Daughters of the American Revolution, 2020

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 –Chair 2008-2009, 2014-2015, 2019-2020. First elected 2005.
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