

The Boston Security Analysts Society, Inc.

# SUSTAINABLE INVESTING

## MOVING INTO THE MAINSTREAM

The Westin Boston Waterfront, 425 Summer Street, Boston  
Thursday, November 19, 2015



- |                |  |
|----------------|--|
| <b>7:30am</b>  | <b>Registration Opens</b>  |
| <b>7:45am</b>  | <b>Continental Breakfast/Sponsor Breakfast</b>   |
| <b>8:45am</b>  | <b>Welcome and Introductions</b><br><i>Michael Greis, CFA , Principal, Riverbend Advisors and Chair of the Seminar Committee</i>   |
| <b>9:00am</b>  | <b>Pricing Climate Risk</b><br><i>Robert Litterman, Risk Committee Chairman, Kepos Capital LP</i>  |
| <b>9:45am</b>  | <b>Implementation of Sustainability Accounting Standards</b><br><i>Dr. Jean Rogers, PhD, PE, CEO, Sustainability Accounting Standards Board (SASB)</i>   |
| <b>10:30am</b> | <b>BREAK</b>   |
| <b>11:00am</b> | <b>Incorporating Climate Change into Portfolio Management &amp; Construction</b><br><i>Cheryl Smith, PhD, CFA, Managing Partner, Trillium Asset Management</i><br><i>Heidi Vanni, CFA, Portfolio Manager, Boston Trust &amp; Investment Management Company</i>                             |
| <b>11:45am</b> | <b>Asset Owner Conversation - Manager Selection and Communication</b><br><i>Daniel Ingram, Head of Responsible Investment, BT Pension Scheme Management</i><br><i>Tim McCarthy, Director of Corporate Governance, Investor and Counterparty Services, Wellington Management Company</i>    |
| <b>12:30pm</b> | <b>LUNCH</b>   |
| <b>1:15pm</b>  | <b>Governance</b><br><i>Ric Marshall, Executive Director, MSCI ESG Research, Moderator</i><br><i>Robert M. Wilson, Jr., Investment Officer and Research Analyst, MFS Investment Management</i><br><i>Malcolm (Mac) Ryerse, Columbia Threadneedle Investments</i>                           |
| <b>2:00pm</b>  | <b>Performance</b><br><i>Andreas Hoepner, Senior Academic Fellow, PRI and Associate Professor of Finance, ICMA Centre, Henley Business School</i><br><i>Stephen R. Freedman, PhD, CFA Head of Thematic and Sustainable Investing Strategy</i><br><i>UBS CIO Wealth Management Americas</i> |

<b>2:45pm</b>	<b>BREAK</b>
<b>3:15pm</b>	<b>Fiduciary Duty and ERISA</b> <i>Sonal Mahida, PRI – moderator</i> <i>David Webber, Associate Professor at Boston University School of Law</i> <i>Lindsay B. Jackson, Morgan, Lewis &amp; Bockius LLP</i> <i>Vonda Brunsting, Capital Stewardship Program, SEIU</i>
<b>4:00pm</b>	<b>Tools &amp; Takeaways: A recap of today’s insights</b> <i>Dr. Robert G. Eccles, Professor, Harvard Business School</i> <i>Board of Directors, Sustainability Accounting Standards Board (SASB)</i>
<b>4:45 – 6:00</b>	<b>NETWORKING RECEPTION</b>