

CFA Society Boston

SUSTAINABLE INVESTING

MOVING INTO THE MAINSTREAM

Sheraton Boston, 39 Dalton Street, Boston, MA

Monday, November 13, 2017



- 7:30am** **Registration Opens**
- 7:45am** **Continental Breakfast**
- 8:45am** **Welcome and Introductions**
Michael Greis, CFA, Principal, Riverbend Advisors and Chair of the Seminar Committee
- 9:00am** **Opening Keynote**
Ken Hokugo, Director of Hedge Fund Investments, Pension Fund Association of Japan
- 9:45am** **Green not Greenwashing: Separating Strategy from Story**
Moderator: Jason Jay, Senior Lecturer, Sustainability and Director of the Sustainability Initiative, MIT Sloan School
David Stangis, Vice President, Corporate Responsibility and Chief Sustainability Officer, Campbell Soup
Nelson Switzer, Vice President and Chief Sustainability Officer, Nestlé Waters North America
David Tulauskas, Sustainability Director, General Motors Company
- 10:30am** **BREAK**
- 11:00am** **ESG Product Development**
Moderator: Noel Friedman, Business Manager, ESG Research Products at MSCI
Edward Farrington, AIF, Executive Vice President, Natixis Global Asset Management – U.S. Distribution
Jordan Farris, Vice President, Head of ETF Product Development, TIAA Nuveen
David King, Head of ESG, Fidelity Investments
- 12:00pm** **LUNCH**
- 1:00pm** **Afternoon Keynote**
Mark D. Wiseman, Global Head of Active Equities & Chairman of BlackRock Alternative Investors
Discussant: Michael Greis, CFA, Principal, Riverbend Advisors
- 2:00pm** **Innovations in Reporting: Delivering a Better Investment Message**
Moderator: Matthew Patsky, CFA, CEO & Portfolio Manager, Trillium Asset Management
Ann Condon, Director, Resource and Environmental Strategies, General Electric Company
Sophia Mendelsohn, Head of Sustainability, JetBlue

2:45pm

BREAK

3:15pm

Building Personalized Sustainable Investing Portfolios for High Net Worth Clients

Katy Zhao, Vice President, Portfolio Manager, Financial Advisor, Morgan Stanley

4:00pm

Leading Practices in Water Risks Integration in Investment Decision-Making

Moderator: Monika Freyman, CFA, Director, Investor Engagement, Water, Ceres

Cyrus Lotfipour, CFA, Vice President and Head of North American ESG Analyst Team, MSCI

David Richardson, CFA, Executive Director, Global Head of Marketing and Client Service,

Impax Asset Management, LLC

Andrew Teras, Vice President, Credit Research, Breckinridge Capital Advisors

4:45pm

Stages of ESG Integration

Moderator: Carol Jeppesen, Senior US Network Manager, Principles for Responsible Investment

Mahesh Jayakumar, CFA, FRM, Senior ESG Investment Strategist, State Street Global Advisors

Justin Sloggett, CFA, Head of Public Markets, Principles for Responsible Investment

5:15pm

NETWORKING RECEPTION