



CFA Society Boston
Sustainable Investing Seminar
Moving Into the Mainstream



07:30 AM - 08:15 AM Registration Opens

07:45 AM - 08:30 AM Continental Breakfast

08:40 AM - 09:00 AM **Welcome and Introductions**

Erinn King, CFA, Principal, Payden & Rygel, Immediate Past Chair of the Board, CFA Society Boston

Margaret Franklin, CFA, President and CEO, CFA Institute (Video Introduction)

Michael Greis, CFA, Principal, Riverbend Advisors and Chair of the Seminar Committee

09:00 AM - 10:00 AM **Keynote: An Impact Investing Conversation**

Pamela Norley, President, Fidelity Charitable

Fran Seegull, Executive Director, U.S. Impact Investing Alliance

10:00 AM – 10:45 AM **Performance in Sustainable Investing – Practitioner and Academic Research**

Moderator:

James Rich, Management Committee Member, Chairperson of the Sustainable Investment Committee, Portfolio Manager, Aegon Asset Management

Speakers:

Mike Chen, Direct Portfolio Management, PanAgora Asset Management

Abhishek Gupta, CFA, Vice President, Equity Solutions Research, MSCI

Asha Mehta, CFA, SVP, Director, Portfolio Manager, Acadian Asset Management

10:45 AM - 11:15 AM Morning Break

11:15 AM - 12:15 PM **ESG Integration in Fixed Income – Investment Grade, High Yield & Municipal**

Moderator:

Max Messervy, Mercer, Senior Associate, Responsible Investment

Speakers:

Rob Fernandez, CFA, Vice President, Director of ESG Research, Breckinridge Capital Advisors

Barbara J. McKenna, CFA, Managing Principal, Portfolio Manager, Longfellow

Peter Schwab, CFA, SVP, Portfolio Manager - Pax High Yield Bond Fund, Impax Asset Management LLC

12:15 PM - 01:15 PM Lunch

01:15 PM - 02:00 PM **Bonds with Impact**

Moderator:

June Choi, Climate Finance Analyst, Climate Policy Initiative

Speakers:

Jeffrey R. Diehl, CEO, Rhode Island Infrastructure Bank

Aki Jain, Senior Financial Officer, Capital Markets, World Bank Treasury

Steven Nichols, Director, ESG Capital Markets, Bank of America Merrill Lynch

02:00 PM - 02:45 PM Industry and Issue Forum: Toxicity

Moderator:

Michael Greis, CFA, Principal, Riverbend Advisors and Chair of the Seminar Committee

Speakers:

Andrew Brady, Co-head of Stressed/Distressed Research/Sr Analyst, CreditSights

Tom Bruton, PhD, Senior Scientist, Green Science Policy Institute

Holly Froum, Litigation Analyst, Bloomberg Intelligence

02:45 PM - 03:00 PM Afternoon Break

03:00 PM – 03:45 PM Putting Data to Work – Managing Climate Risk

Moderator:

Laura Zizzo, Founder & CEO, Mantle 314 Inc.

Speakers:

Frederick W. Isleib III, CFA, Director of ESG Research & Integration, Manulife Investment Management

Anja Ludzuweit, Vice President, Climate Specialist, MSCI

Samantha Stephens, SRI Research Analyst, Mirova

03:45 PM - 04:45 PM ESG in Manager Diligence, Selection and Monitoring – A Deep Dive

Moderator:

Andrew Wetzel, CFA, Portfolio Manager, F.L. Putnam Investment Management Company Inc

Speakers:

Brittany Bascom, Global Head of Investment Analysis, John Hancock Investments

Sarah Hoyt, Investment Director, Mission Related Investing, Cambridge Associates

Kristine Pelletier, Partner, NEPC

04:45 PM - 05:45 PM Closing Remarks & Networking Reception