



Barron's ESG+Impact Summit

Investing with Impact

6/20/19
New York City

THURSDAY, JUNE 20TH

- 8:00 am - 5:00 pm Registration
- 8:00 am - 9:00 am Breakfast
- 9:00 am - 9:50 am Sustainable Growth ^{I-W}
Andrew Lee, Managing Director, Head of Sustainable and Impact Investing Americas, UBS Global Wealth Management Chief Investment Office
Angela Mwanza, Senior Vice President, UBS Private Wealth Management
Moderator: Jason Chandler, Group Managing Director, Head, UBS Wealth Management USA
- 9:50 am - 10:30 am 2020 Vision: What the ESG Investing Community Should Watch for in the Race for President ^{CFP | I-W}
Joseph Keefe, President & CEO, Pax World Funds; President, Impax Asset Management LLC; President, Pax Ellevest Management LLC
Interviewer: Laura Kane, Executive Director, Head of Thematic Research Americas, UBS Global Wealth Management Chief Investment Office
- 10:30 am - 10:50 am Refreshment Break
- 10:50 am - 11:40 am Implementation - Strategy, Selection & Measuring Impact Outcomes ^{CFP | I-W}
Anna Snider, Head of Due Diligence, Global Wealth & Investment Management CIO Office, Bank of America Merrill Lynch
Lily Trager, Executive Director, Director of Investing with Impact, Morgan Stanley Wealth Management
Caleb Tuten, Investment Analyst, Global Manager Research, Wells Fargo
Moderator: Leslie Norton, Senior Special Writer, Barron's Magazine
- 11:40 am - 12:20 pm Sustainable Policy Initiatives - Opportunity Zones & Environmental Regulation ^{CFP | I-W}
Dr. Steven Cohen, Senior Vice Dean, Columbia University
Interviewer: Chris Merker, Ph.D., CFA, Director, Private Asset Management, Robert W. Baird & Co.
- 12:20 pm - 1:20 pm **LUNCH**

Attendees of the Barron's ESG & Impact Summit can apply for 6 CE CFP credits & 7 CE hours (toward CIMA®/CIMC®/CPWA® designations). A survey will be emailed to you following the Summit.



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- 1:20 pm - 2:20 pm Integrating Impact to Generate Alpha & Mitigate Risk for Desired Outcomes **CFP | I-W**
Scott Conlon, Senior Equity Specialist, Aberdeen Standard Investments
Erik Gosule, Head of Strategic Marketing and Product Development, Americas, Amundi Pioneer Asset Management
John Streur, President & CEO, Calvert Research and Management
Moderator: Michelle Buckley, Chief Investment Officer, Baldwin Brothers
- 2:20 pm - 3:10 pm Articulating ESG Value to Clients: The Discovery Process & Beyond **CFP | I-W**
Nick Gerace, Senior Vice President, Investments, Dynasty Financial Partners
Erika Karp, Founder & CEO, Cornerstone Capital Group
Richard Zimmerman, Advisor, WE Family Offices
Moderator: Sharon Cunningham, Senior Portfolio Management Director, Executive Director, Morgan Stanley Wealth Management
- 3:10 pm - 3:30 pm Refreshment Break
- 3:30 pm - 4:10 pm Understanding the Value of Impact Investing **CFP | I-W**
Andrew Parry, Head of Sustainable Investing, Federated Investors
Interviewer: **Michael Whelchel**, Managing Partner, Big Path Capital
- 4:10 pm - 5:00 pm Disrupting Philanthropy
Scott Harrison, Founder & CEO, Charity: Water
- 5:00 pm - 6:00 pm Cocktail Reception

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