

BRACE FOR IMPACT

BARRON'S IMPACT INVESTING SUMMIT
Four Seasons Hotel San Francisco

06 | 21 | 18



THURSDAY, JUNE 21ST

8:00 am - 8:55 am	Networking Breakfast
8:55 am - 9:05 am	Welcome Remarks
9:05 am - 9:30 am	The Future of ESG: Trends, Themes, Expectations Audrey Choi , Chief Marketing Officer and Chief Sustainability Officer, Morgan Stanley
9:35 am - 10:25 am	Creating The Framework for Success in Impact Investing ^{CFP I-W} Moderated by: Jeffrey Gitterman , Co-Founding Partner, Gitterman Wealth Management Linda Stephans , Graystone Consulting, a business of Morgan Stanley Margaret Towle , Merrill Lynch Wealth Management
10:25 am - 10:35 am	Refreshment Break
10:35 am - 11:25 am	Analyzing the Performance Argument ^{CFP I-W} Moderated by: Jack Otter , Associate Publisher, Dow Jones Wealth & Asset Management Edward Farrington , Executive Vice President of Retirement Strategies, Natixis Investment Managers Megan Fielding , Senior Director, Responsible Investing, Nuveen Chris McKnett , Managing Director, Head of ESG, State Street Global Advisors
11:25 am - 12:15 pm	Current Challenges in the ESG market: What Needs to be Done? ^{CFP I-W} Moderated By: Craig Pfeiffer , President & CEO, Money Management Institute Andrew Lee , Head of Sustainable and Impact Investing - Americas, UBS Global Wealth Management Chris Merker , Robert W. Baird & Co. Lily Trager , Executive Director, Director of Investing with Impact, Morgan Stanley Wealth Management
12:15 pm - 12:20 pm	Refreshment Break
12:20 pm - 1:20 pm	LUNCH
1:20 pm - 1:30 pm	Refreshment Break
1:30 pm - 2:10 pm	Combining Impact Investing with Philanthropic Efforts ^{CFP I-W} Moderated by: Sterling Shea , Global Head, Dow Jones Wealth & Asset Management Melissa Berman , President & CEO, Rockefeller Philanthropy Advisors, Inc. Greg Fleming , President & CEO, Rockefeller Capital Management

Attendees of the Barron's Top Impact Investing Summit can apply for 7 CE CFP credits & 7 CE hours (toward CIMA®/CIMC®/CPWA® designations). A survey will be sent to you after the conference.

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THURSDAY, JUNE 21ST

- 2:15 pm - 3:05 pm Data & Credible Impact Reporting: Where to Look ^{CFP | I-W}
 Moderated by: **Jonathan Foster**, Angeles Wealth Management
Meredith Block, Vice President and ESG Analyst, Rockefeller Capital Management
Scott Conlon, Equity Investment Specialist, Aberdeen Standard
Bob Smith, President & Chief Investment Officer, Principal, Sage
- 3:05 pm - 3:15 pm Refreshment Break
- 3:15 pm - 4:05 pm Perspective on Policy ^{CFP | I-W}
 Moderated by: **Kevin Pasha**, Morgan Stanley Wealth Management
Robert Bush, Director, Thought Leadership US ETFs, DWS
Abdur Nimeri, PhD, Senior Investment Strategist, FlexShares
- 4:10 pm - 5:00 pm Creating the Ecosystem to Succeed: Next Steps ^{CFP | I-W}
 Moderated By: **Fran Seegull**, Executive Director, U.S. Impact Investing Alliance,
 Ford Foundation
Justina Lai, Director of Impact Investing, Wetherby Asset Management
Matt Moscardi, Senior Analyst, Head of Sector Research, MSCI
Anna Snider, Head of Due Diligence, Global Wealth & Investment Management CIO
 Office, Bank of America Merrill Lynch
- 5:00 pm - 6:00 pm Cocktail Reception