

PROGRAM AGENDA

Tuesday, October 21, 2014 | CUNY Graduate Center NYC

MORNING PANEL

LOCATION

8:00 – 8:30 am	Registration & Breakfast	Concourse
8:30 – 8:45 am	Introductions	Auditorium
8:45 – 9:30 am	An Impact Investment Story – Where are We Now? Clara Miller, President, The F.B. Heron Foundation	Auditorium
9:30 – 10:15 am	A Framework for Structuring a Sustainable Impact Investing Strategy Laurie Spengler, Enclude Liesel Pritzker Simmons, Blue Haven Initiative Mattherw Weatherley-White, The CAPROCK Group	Auditorium
10:15 – 10:45 am	Networking Break	Concourse

MORNING BREAKOUT SESSIONS

10:45 – 11:40 am **Breakout Sessions (4 breakouts per session – choose one)**

A. Catalytic Capital Gerhard Pries, Sarona Asset Management Lauren Booker, Omidyar Network Maria Cavalcanti, FIRST Brazil Impact Investing Fund Joan Trant, TriLinc Global	Martin Segal Theater 1st Floor
B. “What is the There There” – Track Records of Impact Jean Hammond, Learn Launch Monica Brand Engel, ACCION Frontier Investments Amie Patel, Imprint Capital Candace Smith, MicroVest Anna Snider, Merrill Lynch	Auditorium
C. Socially Focused Investing, Healthcare John Brooks, Joslin Diabetes Center Brooke Beardslee, Grameen PrimaCare Adele Oliva, 1315 Capital Greg Simon, Poliwogg Julianne Zimmerman, Vodia Ventures	Concourse C-198
D. Environmentally Focused Investing, Water and Agriculture Fran Seegull, ImpactAssets Catherine Gill, Root Capital Marc Robert, Water Asset Management Bettina Von Hagen, Ecotrust Forest Management Kelly Wachowicz, EKO Asset Management Partners	Skylight Room 9100 9th Floor

11:40 – 12:30 pm **Networking Lunch** Concourse

AFTERNOON PANELS

12:30 – 1:25 pm	Women in Impact Investing — How do you do it? Jackie VanderBrug, U.S. Trust Mae Hong, Rockefeller Philanthropy Advisors Kay Koplovitz, Springboard Fund Allyson McDonald, Ellevest Jennifer Pryce, Calvert Foundation	Auditorium
1:25 – 1:50 pm	New Evidence of Women’s Performance in Financial Sector Elise Zoli, Goodwin Procter LLP	Auditorium
1:50 – 2:35 pm	Investing Directly: Overcoming the Challenges of Direct Investing Diana Propper de Callejon, Cranemere, Inc. Jolyne Caruso-FitzGerald, The Alberleem Group Melissa Cheong, Imprint Capital Advisors Kate Starr, The F.B. Heron Foundation	Auditorium

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2:35 – 3:00 pm **Networking Break** Concourse

AFTERNOON BREAKOUT SESSIONS

3:00 – 3:55 pm **Break-out Sessions (4 breakouts per session – choose one)**

A. Investing in Social Entrepreneurs Skylight
Alice Mann, Alice Mann, LLC Room 9100
Maya Chorengel, Elevar Equity 9th Floor
Liz Lockett, Social Entrepreneurs' Fund
Kate McElligott, Prosperity Catalyst
Bonny Moellenbrock, Investors' Circle

B. Investing in Cities, A New Approach to Urban Investing Martin Segal
Lisa Davis, Ford Foundation Theater
Anne Evans, Ashoka 1st Floor
Lisa Hinds, IC Riverside Church NYC
Doug Lawrence, 5 Stone Green Capital – Bainbridge

C. Investing in the “G” – Governance Concourse
Katherine Burstein, Pell Wealth Partners C-198
Eve Ellis, Morgan Stanley
Sue Meirs, Barclays Capital
Eva Zlotnicka, UBS Investment Bank

D. Environmentally Focused Investing, Incorporating Climate Risk into Investment Decisions Auditorium
Christina Leijonhufvud, Tideline Advisors
Peter Fusaro, Global Change Associates Inc
Spencer Hempleman, Ardsley Partners
Jenna Nicholas, Phoenix Global Impact
Elise Zoli, Goodwin Procter LLP

CLOSING AGENDA

4:00 – 5:00 pm **Putting It All Together, Balancing Intentions with Investing** Auditorium
Erika Karp, Cornerstone Capital Group
Kristin Hull, Nia Global Solutions
Diane Keefe, Friends Fiduciary Committee
Bonny Moellenbrock, Investors' Circle
Abigail Noble, World Economic Forum
Diane Schmidt, Blue Moon Fund, Inc.

5:00– 5:30 pm **Open Forum: What is still unanswered?** Auditorium
What would you like to hear more of?

5:30– 5:45 pm **Closing Remarks**

5:45–7:00 pm **Cocktail Reception** Concourse

SYMPOSIUMLAB

8:00 am – 6:00 pm **SymposiumLab: concurrent with speaker schedule** Concourse
The SymposiumLab will highlight resources available to the conference Rooms
participants (focused on investors and investment advisors), including 201-202
platforms for investing, trading, educational and networking groups, impact
measurement solutions and other technology solutions. Specific solutions
will be highlighted, like peer-to-peer, crowd-funding, and other direct to
investor solutions.