

## US | SIF FORUM 2022 Agenda

### Monday, June 6, 2022 – MEMBER DAY

Agenda	Title	Speakers
7:30 am - 6:00 pm	Conference Registration – Member Day	Registration Opens for Member Day
9:30 am - 10:00 am	Coffee available	Member Day Coffee
10:00 am - 10:50 am	Session	<i>What's Up with the Evolution of ESG Standards Bodies</i> Katie Eulitt, ISSB Bryan McGannon, US SIF
11:00 am - 11:10 am	Welcome to Member Day: Lisa Woll and Diederik Timmer	Welcome to Member Day Lisa Woll, US SIF Diederik Timmer, US SIF Board Chair
11:10 am - 12:10 pm	Member Day Session	<i>Advancing DEI and Racial Justice in Your Firm</i> Iyassu Essayas, E & I Consulting (Moderator) Justin Conway, Calvert Impact Capital Sada Geuss, Trillium Asset Management Mary Beth Gallagher, Domini Impact Investments
12:15 pm - 1:30 pm	Member Day Lunch	Member Day Lunch
1:35 pm - 2:30 pm	Member Day Session	<i>Responding to the Media and Clients on the Greenwashing Critique</i> Diederik Timmer, US SIF Board Chair (Moderator) Jody Lowe, Lowe Group Jon Hale, Morningstar
2:35 pm - 3:15 pm	Networking & Exhibitor Fair	Networking & Exhibitor Fair
3:20 pm - 4:30 pm	Policy briefing	<i>Policy Briefing</i> Bryan McGannon, US SIF
4:30 pm - 6:30 pm	Recreation and Connection	Recreation and Connection Time
6:30 pm - 9:00 pm	Member Day Reception	Member Day Reception

**Tuesday, June 7, 2022**

Agenda	Title	Speakers
6:30 am - 7:30 am	Morning Yoga	Vinyasa Yoga Flow class with Brittany D'Amico
7:15 am - 6:00 pm	Conference Registration	Registration Opens FORUM 2022
7:30 am - 10:25 am	Pre-Conference Training Course	<i>Fundamentals of Sustainable and Impact Investment</i>  Michael Young, US SIF Kimberly Gluck, Boston Trust Walden Erin Gray, Green Century Victor Orozco, Bair Financial Planning Jennifer Coombs, College for Financial Planning
8:00 am - 9:00 am	Breakfast (Member Day registrants only)	Member Day Breakfast
9:15 am - 10:00 am	Annual Member Meeting	Annual Member Meeting
10:00 am - 10:30 am	Coffee Break	
10:30 am - 11:40 am	Conference Kickoff & Plenary	Conference Kick-off; <i>ESG Data: Getting to Double materiality</i>  Linda-Eling Lee, MSCI MJ McQuillen, Clearbridge Investments Anthony Eames, Calvert Asset Management Michael Kramer, Natural Investments
11:45 am - 12:40 pm	Breakout Sessions	<i>Aligning Net Zero Targets &amp; Commitments with Your Portfolio</i>  Dina Clarmatori, Neuberger Berman (Moderator) Julie Gorte, Impax Asset Management Rick Walers, The Pensions Boards - UCC, Inc. James Andrus, CalPERS
		<i>Investing for Impact in Indigenous Communities</i>  Kate Flinn, First Peoples Worldwide (Moderator) Suzanne Benally, Swift Foundation Vanessa Roanhorse, Native Women Lead Garry McBerryhill, Raven Indigenous Capital
12:45 pm - 2:00 pm	Lunch	Lunch Plenary - Ali Zaidi, The White House

2:05 pm - 3:00 pm	Breakout Sessions	<i>How to Talk to Clients about Impact Themes</i>	Michael Young, US SIF (Moderator) Stephanie Cohn-Rupp, Veris Wealth Partners Justina Lai, Wetherby Asset Management
		<i>Should ESG Play a Role in Executive Compensation</i>	Amy Borus, Council of Institutional Investors (Moderator) Kristin Drake, Dimensional Asset Management Diana Lee, AllianceBernstein Brian Bueno, Farient Advisors
		<i>The Complex Picture of Private Markets and ESG</i>	Craig Metrick, Pathstone (Moderator) Margot Brandenburg, Ford Foundation Steven George, InterAlpen Partners
3:00 pm - 3:40 pm	Networking & Exhibitor Fair	Networking & Exhibitor Fair	
3:45 pm - 4:45 pm	Plenary Session	Representative Jamie Raskin	Jamie Raskin, Member of Congress (MD-08)
		Lisa Woll in conversation with Tim Smith	Lisa Woll, US SIF Tim Smith, Boston Walden Trust
4:45 pm - 6:30 pm	Recreation and Connection	Recreation and Connection	
7:00 pm - 9:30 pm	Reception	Reception	

**Wednesday, June 8, 2022**

	<b>Agenda</b>	<b>Title</b>	<b>Speakers</b>
7:30 am - 1:00 pm	Conference Registration	FORUM 2022 Registration	
7:30 am - 8:30 am	Breakfast & Table Topics	Breakfast & Table Topics	
8:35 am - 9:10 am	Plenary Session	<i>SEC Commissioner Caroline Crenshaw</i>	Caroline Crenshaw, Securities and Exchange Commission Commissioner
9:10 am - 10:15 am	Plenary Session	<i>The Greenwashing Critique: Truth, Fiction or a Little of Both?</i>	Leslie Norton, Morningstar (Moderator) Lily Trager, Morgan Stanley Leslie Samuelrich, Green Century Chris Fidler, CFA Institute
10:20 am - 11:10 am	Networking & Exhibitor Fair	Networking & Exhibitor Fair	
11:15 am - 12:10 pm	Breakout Sessions	<i>Can You Really Have Your Market Rate Returns and Racial Justice Too?</i>	Ivy Jack, NorthStar Asset Management (Moderator) Tynesia Boyea-Robinson, CapEQ Nicole Holloway, Natural Investments Lisa Wright, OFN
		<i>Drowning in Plastics: What's the Best Way Forward?</i>	Conrad McKerron, As You Sow (Moderator) Sandra West, City of Albuquerque Anna Cummins, 5 Gyres
12:15pm - 12:50 pm	Conference Session	Ian Urbina - Author, Director and Founder, The Outlaw Ocean Project	Ian Urbina, The Outlaw Ocean Project
12:55 pm - 2:15 pm	Lunch	Lunch	
2:15 pm - 2:15 pm	Conference concludes: See you in 2023!		