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The Future of Investing | The Broadmoor | November 9-11, 2014
The Conference on Sustainable, Responsible, Impact Investing

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2014 CONFERENCE PRESENTERS



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Susan Avery ([agenda/conference-presenters/speaker-bio.html?objectID=52](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=52))

President and Director, Woods Hole Oceanographic Institution

Susan K. Avery is President and Director of Woods Hole Oceanographic Institution (WHOI). She has used her unique position to underscore the importance of ocean-atmosphere interactions in understanding whole Earth systems. Dr. Avery has delivered Cong Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=52](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=52))



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Benjamin Bailey (agenda/conference-presenters/speaker-bio.html?objectID=12)

Co-Manager, Praxis Intermediate Income Fund, Praxis Mutual Funds

Benjamin Bailey joined Everence in 2000 and was named co-portfolio manager of the Praxis Intermediate Income Fund in March 2005, and co-manager of the Praxis Genesis Portfolios in June 2013. Before then, he served as assistant portfolio manager for t Read More... (agenda/conference-presenters/speaker-bio.html?objectID=12)



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Mark Bateman (agenda/conference-presenters/speaker-bio.html?objectID=13)

Founder and President, ENSOGO Analytics

With over two decades of expertise in environmental, social, and governance (ESG) research, Mark Bateman founded ENSOGO Analytics to democratize access to ESG research and support the retail-level, mutual fund investor. His consultancy, Segue Point, Read More... (agenda/conference-presenters/speaker-bio.html?objectID=13)



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Shari Berenbach (agenda/conference-presenters/speaker-bio.html?objectID=44)

President and Chief Executive Officer, U.S. African Development Foundation

Shari Berenbach is the President and Chief Executive Officer of the United States African Development Foundation, a public corporation of the U.S. government that awards economic development grants to marginalized and underserved populations in confl Read More... (agenda/conference-presenters/speaker-bio.html?objectID=44)



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Henry Berman (agenda/conference-presenters/speaker-bio.html?objectID=14)

Chief Executive Officer, Exponent Philanthropy

Henry Berman is the Chief Executive Officer of Exponent Philanthropy. He was instrumental in helping the Association of Small Foundations (ASF) evolve into Exponent Philanthropy. Mr. Berman has served as a foundation president and co-trustee, and b Read More... (agenda/conference-presenters/speaker-bio.html?objectID=14)



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Tim Brennan (agenda/conference-presenters/speaker-bio.html?objectID=15)

Chief Financial Officer, Treasurer, Unitarian Universalist Association

Tim Brennan is Treasurer and Chief Financial Officer of the Unitarian Universalist Association (UUA). As such, he is responsible for all of its financial affairs. He also monitors the Association's investments to ensure their compliance with social Read More... (agenda/conference-presenters/speaker-bio.html?objectID=15)



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Lucy Cantwell (agenda/conference-presenters/speaker-bio.html?objectID=61)

Executive Director, New Belgium Family Foundation

Lucy Cantwell is the Executive Director of the New Belgium Family Foundation, which seeks to honor the regenerative potential of business through meaningful investing, philanthropy and advocacy. She manages both the philanthropic and direct investme Read More... (agenda/conference-presenters/speaker-bio.html?objectID=61)



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Paige Chapel (agenda/conference-presenters/speaker-bio.html?objectID=16)

President and Chief Executive Officer, Aeris

Paige Chapel is the president and chief executive officer of Aeris, the company behind CARS® Ratings. Aeris is an independent information service providing ratings, data, analysis, and advisory services to support investor research and due diligence Read More... (agenda/conference-presenters/speaker-bio.html?objectID=16)



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Kristen Cox (agenda/conference-presenters/speaker-bio.html?objectID=17)

Investment Associate, Self-Help Credit Union

Kristen Cox works as an Investment Associate for Self-Help, a leader in the Community Development Financial Institution (CDFI) movement that includes two credit unions, a community development corporation, a non-profit ventures fund, and a research a Read More... (agenda/conference-presenters/speaker-bio.html?objectID=17)



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Lew Daly (agenda/conference-presenters/speaker-bio.html?objectID=56)

Demos, Director of Policy and Research

Lew Daly is Director of Policy and Research at Demos helping to plan and manage research and policy development. He leads Demos' Beyond GDP project, a multi-year campaign to advance alternative indicators of well-being and sustainability in federal a Read More... (agenda/conference-presenters/speaker-bio.html?objectID=56)



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Patrick Doherty (agenda/conference-presenters/speaker-bio.html?objectID=40)

Founding co-director, Strategic Innovation Lab, Case Western Reserve University

Patrick Doherty is the founding co-director of the Strategic Innovation Lab at Case Western Reserve University. Previously he was at the New America Foundation, where he teamed up with retired Marine Colonel Mark "Puck" Mykleby to launch the Grand S Read More... (agenda/conference-presenters/speaker-bio.html?objectID=40)



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Olga Emelianova (agenda/conference-presenters/speaker-bio.html?objectID=55)

Vice President, ESG Research, MSCI

Olga Emelianova leads the North American MSCI ESG Research team in New York, Boston, and Toronto. She also heads the Consumer sector research. She has 12 years of experience in environmental, social and governance (ESG) research and performance monit Read More... (agenda/conference-presenters/speaker-bio.html?objectID=55)



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Jed Emerson ([agenda/conference-presenters/speaker-bio.html?objectID=49](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=49))

Chief Impact Strategist, ImpactAssets

Jed Emerson oversees ImpactAssets intellectual property development and field building efforts as an impact investment advisor, author and public speaker. He participates in the firm's strategic development working with the distribution and investing Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=49](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=49))



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Steve Falci (agenda/conference-presenters/speaker-bio.html?objectID=18)

Chief Investment Officer, Pax World Management

Steve Falci is Chief Investment Officer for Pax World Funds. He joined the Investment Management Department in 2014 to aid in fund strategy development, oversee the collaboration between investment analysis and environmental, social and governance-ba Read More... (agenda/conference-presenters/speaker-bio.html?objectID=18)



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James Frazier (agenda/conference-presenters/speaker-bio.html?objectID=19)

Certified Financial Planner, Natural Investments LLC

James Frazier is a Certified Financial Planner™ specializing in sustainable, responsible, and impact (SRI) investing with Natural Investments LLC. He serves clients nationwide from Washington State and Maui, Hawaii, and has over twenty years of experience Read More... (agenda/conference-presenters/speaker-bio.html?objectID=19)



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Bennett Freeman (agenda/conference-presenters/speaker-bio.html?objectID=20)

Senior Vice President, Social Research and Policy, Calvert Investments

As Senior Vice President for Sustainability Research and Policy at Calvert Investments, Bennett Freeman leads the environmental, social and governance research, shareholder advocacy and public policy work of the largest family of sustainable and resp Read More... (agenda/conference-presenters/speaker-bio.html?objectID=20)



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Julie Goodridge (agenda/conference-presenters/speaker-bio.html?objectID=2)

CEO and Founder, NorthStar Asset Management, Inc

Julie Goodridge is the CEO and Founder of NorthStar Asset Management, Inc. She began her career as an investment professional in 1983 at Merrill, Lynch, Pierce, Fenner and Smith. Previously, she was an Account Executive at EF Hutton and Associate V Read More... (agenda/conference-presenters/speaker-bio.html?objectID=2)



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Julie Gorte (agenda/conference-presenters/speaker-bio.html?objectID=37)

Senior Vice President, Sustainable Investing, Pax World Management

Julie Fox Gorte, PhD is the Senior Vice President for Sustainable Investing at Pax World Management LLC. She oversees Environmental, Social and Governance-related research on prospective and current investments as well as Pax's shareholder advocacy a Read More... (agenda/conference-presenters/speaker-bio.html?objectID=37)



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Cylvia Hayes ([agenda/conference-presenters/speaker-bio.html?objectID=48](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=48))

Founder, Chief Executive Officer, 3E Strategies

Cylvia Hayes is the Founder and Chief Executive Officer of 3E Strategies working to accelerate the transition to sustainable building, energy and economic practices. She has worked in sustainable energy, economic development, green jobs, green buildi Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=48](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=48))



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Lisa Hayles (agenda/conference-presenters/speaker-bio.html?objectID=3)

Client Service / Marketing Team, Boston Common Asset Management

Lisa Hayles is a member of the Client Service / Marketing Team at Boston Common Asset Management. She works closely with members of the investment team to liaise with existing institutional clients, as well as to support the development of new relat Read More... (agenda/conference-presenters/speaker-bio.html?objectID=3)



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Steven Heim (agenda/conference-presenters/speaker-bio.html?objectID=54)

ESG Research & Shareholder Engagement Team , Boston Common Asset Management

Steven Heim is on the ESG Research & Shareholder Engagement Team at Boston Common Asset Management. He is primarily responsible for ESG research on domestic and international companies and for shareholder engagement work. He has over 20 years' exper Read More... (agenda/conference-presenters/speaker-bio.html?objectID=54)



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R. Paul Herman ([agenda/conference-presenters/speaker-bio.html?objectID=22](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=22))

Chief Executive Officer, Founder, HIP Investor, Inc.

R. Paul Herman is CEO and a registered representative of HIP Investor Inc., an investment advisor. He created the HIP (Human Impact + Profit) methodology for entrepreneurs, companies and investors worldwide to realize how quantifiable sustainability Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=22](http://www.sriconference.com/agenda/conference-presenters/speaker-bio.html?objectID=22))



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Diane Holdorf (agenda/conference-presenters/speaker-bio.html?objectID=4)

Chief Sustainability Officer and Vice President of Environmental Stewardship, Health and Safety, The Kellogg Company

Diane Holdorf is Chief Sustainability Officer and Vice President of Environmental Stewardship, Health and Safety at The Kellogg Company. She leads development of the strategic direction on corporate responsibility, global environmental stewardship t Read More... (agenda/conference-presenters/speaker-bio.html?objectID=4)



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Josh Humphreys (agenda/conference-presenters/speaker-bio.html?objectID=1)

Inaugural President, Croatan Institute

Josh Humphreys is the inaugural President of Croatan Institute. He also serves as Board Chair and Senior Fellow of the Institute. He is also an associate fellow at Tellus Institute, the sustainability think tank in Boston. An historian and social c Read More... (agenda/conference-presenters/speaker-bio.html?objectID=1)



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Glenn Hurowitz (agenda/conference-presenters/speaker-bio.html?objectID=5)

Managing Director, Climate Advisers

Glenn Hurowitz is a Managing Director of Climate Advisers. His work focuses on achieving large-scale global emissions reductions at low cost. He is an internationally recognized leader in transforming agricultural supply chains to protect the world' Read More... (agenda/conference-presenters/speaker-bio.html?objectID=5)



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Garvin Jabusch (agenda/conference-presenters/speaker-bio.html?objectID=23)

Co-founder, Chief Investment Officer, Green Alpha Advisors, LLC

Garvin Jabusch is Co-founder and Chief Investment Officer of Green Alpha[®] Advisors, LLC. He is co-manager of the Shelton Green Alpha Fund (NEXTX), of the Green Alpha[®] Next Economy Index, and of the Sierra Club Green Alpha Portfolio. He also authors [Read More...](#) (agenda/conference-presenters/speaker-bio.html?objectID=23)



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Bruce Kahn (agenda/conference-presenters/speaker-bio.html?objectID=24)

Sustainable Insight Capital Management, Sustainable Insight Capital Management

Bruce Kahn has over 25 years of experience in environmental and investment research and management. He is a Portfolio Manager at Sustainable Insight Capital Management, and a Lecturer at Columbia University's Earth Institute in the Sustainability Man [Read More...](#) (agenda/conference-presenters/speaker-bio.html?objectID=24)



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John Katovich (agenda/conference-presenters/speaker-bio.html?objectID=25)

Founder, Cutting Edge Capital

John Katovich is the founder of the Katovich & Kassan Law Group and Cutting Edge Capital. Both firms are committed to fostering triple/quadruple bottom line practices for business, non-profits and communities, and providing capital-raising strategies [Read More...](#) (agenda/conference-presenters/speaker-bio.html?objectID=25)



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Floyd Keene (agenda/conference-presenters/speaker-bio.html?objectID=50)

President, The Triple EEE Foundation

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John Kitzhaber (agenda/conference-presenters/speaker-bio.html?objectID=47)

Governor, State of Oregon

John Kitzhaber is completing his third term as Governor of Oregon. He was elected in 1994, 1998, and again in 2010. A former emergency room physician, Dr. Kitzhaber has focused on the issues of health care reform, public education, and strengtheningin Read More... (agenda/conference-presenters/speaker-bio.html?objectID=47)



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Sonia Kowal (agenda/conference-presenters/speaker-bio.html?objectID=11)

Director of Socially Responsible Investing, Zevin Asset Management

Sonia Kowal is Zevin Asset Management's Director of Socially Responsible Investing. She is a member of the firm's investment committee where she incorporates sustainability into investment decision making. She manages environmental, social, and gover Read More... (agenda/conference-presenters/speaker-bio.html?objectID=11)



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Barbara Krumsiek ([agenda/conference-presenters/speaker-bio.html?objectID=42](#))

President and Chief Executive Officer, Calvert Investments

Barbara J. Krumsiek is Chair, President and CEO of Calvert Investments, Inc. Calvert manages over \$12.5 billion in assets. Ms. Krumsiek has successfully advocated on issues relating to the advancement of women in business including efforts to increa Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=42](#))



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Lloyd Kurtz ([agenda/conference-presenters/speaker-bio.html?objectID=26](#))

Chief Investment Officer, Nelson Capital Management

Lloyd Kurtz is the Chief Investment Officer, senior portfolio manager and co-heads the investment committee for Nelson Capital Management. Before joining Nelson Capital, he was a Senior Vice President at Harris Bretall Sullivan & Smith in San Francis Read More... ([agenda/conference-presenters/speaker-bio.html?objectID=26](#))



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Michael Liebreich (agenda/conference-presenters/speaker-bio.html?objectID=45)

Founder, Chairman of the Advisory Board, Bloomberg New Energy Finance

Michael Liebreich is Chairman of the Advisory Board and Founder of Bloomberg New Energy Finance, the world's leading provider of information on clean energy to investors, energy companies and governments. He leads a global team comprising journalists Read More... (agenda/conference-presenters/speaker-bio.html?objectID=45)



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Elizabeth Littlefield (agenda/conference-presenters/speaker-bio.html?objectID=43)

President and Chief Executive Officer, Overseas Private Investment Corporation

Elizabeth Littlefield was appointed by President Obama as the President and CEO of OPIC, an Under Secretary level position. OPIC, as the US Government's Development Finance Institution, manages an \$18 bn portfolio of financing and insurance to support Read More... (agenda/conference-presenters/speaker-bio.html?objectID=43)



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Sonal Mahida (agenda/conference-presenters/speaker-bio.html?objectID=8)

US Network Manager, Principles for Responsible Investment

Sonal Mahida is the US Network Manager for the Principles for Responsible Investment (PRI) initiative. She is responsible for engaging with and supporting US signatories in the practice and implementation of their Environmental, Social and Governance Read More... (agenda/conference-presenters/speaker-bio.html?objectID=8)



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Lucas Mansberger (agenda/conference-presenters/speaker-bio.html?objectID=58)

Institutional Investment Consultant, Pavillion Advisory Group

Lucas Mansberger is a Consultant with Pavilion Advisory Group Inc. where he provides strategic investment advice to retirement plans, foundations and endowments and healthcare organizations. He also leads the firm's responsible investing activities. Read More... (agenda/conference-presenters/speaker-bio.html?objectID=58)



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Gary Matthews (agenda/conference-presenters/speaker-bio.html?objectID=27)

Investment Advisor Representative, First Affirmative Financial Network, LLC

Gary Matthews has been a practicing CPA and financial advisor for over 30 years and has held management positions in both international and regional CPA firms. He has Managed his own professional practice specializing in sustainable, socially respons Read More... (agenda/conference-presenters/speaker-bio.html?objectID=27)



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Craig Metrick (agenda/conference-presenters/speaker-bio.html?objectID=7)

Principal and US Head of Responsible Investment, Mercer

Craig Metrick is a Principal and US Head of Responsible Investment for Mercer. He consults to public, private and foundation clients on implementing responsible investment principles and mandates within DB and DC structures. Previously, he was Direc Read More... (agenda/conference-presenters/speaker-bio.html?objectID=7)



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Mel Miller (agenda/conference-presenters/speaker-bio.html?objectID=63)

Chief Economist, First Affirmative Financial Network LLC

Mel Miller is Chief Economist of First Affirmative Financial Network, LLC and serves as a member First Affirmative's Investment Committee. Previously, he was the Chief Investment Officer for Heartland Financial USA, Inc. where he was employed for 28 Read More... (agenda/conference-presenters/speaker-bio.html?objectID=63)



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Aaron Miripol (agenda/conference-presenters/speaker-bio.html?objectID=28)

President and Chief Executive Officer, Urban Land Conservancy

Aaron Miripol is the president and CEO of the Urban Land Conservancy (ULC), a supporting non-profit organization to the Denver Foundation. He joined ULC in 2007 and leads this unique real estate company in partnering with a wide range of organization Read More... (agenda/conference-presenters/speaker-bio.html?objectID=28)



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Kathy Mulvey (agenda/conference-presenters/speaker-bio.html?objectID=10)

Executive Director, EIRIS Conflict Risk Network

Kathy Mulvey is the Executive Director of EIRIS Conflict Risk Network which she joined in 2012. She has more than two decades of experience in corporate engagement, campaigning, grassroots organizing, advocacy, policy analysis, coalition-building, st Read More... (agenda/conference-presenters/speaker-bio.html?objectID=10)



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Gloria Nelund (agenda/conference-presenters/speaker-bio.html?objectID=64)

Chairman & Chief Executive Officer , TriLinc Global Impact Fund

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Nick Pelosi (agenda/conference-presenters/speaker-bio.html?objectID=53)

Corporate Engagement Associate, First Peoples Worldwide

Nick Pelosi works in the corporate engagement program at First Peoples Worldwide, an Indigenous organization that supports Indigenous communities at the grassroots level while advocating globally for Indigenous Peoples' rights. He was involved in d Read More... (agenda/conference-presenters/speaker-bio.html?objectID=53)



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John Powers (agenda/conference-presenters/speaker-bio.html?objectID=51)

Chair of Board, Alliance for Sustainable Colorado

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Matt Prescott (agenda/conference-presenters/speaker-bio.html?objectID=29)

Food Policy Director, Humane Society of the United States

For nearly 15 years, Matt Prescott has helped lead the charge to reform how farm animals are treated within the global food supply. He's pioneered new methods of corporate communications in his field, and is a leading expert on shareholder advocacy. [Read More...](#) ([agenda/conference-presenters/speaker-bio.html?objectID=29](#))



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Kevin Ranney ([agenda/conference-presenters/speaker-bio.html?objectID=30](#))

Director of Advisory Services, Sustainalytics

Kevin Ranney is Director of Advisory Services at Sustainalytics. He brings 15 years of experience in the field of environmental, social and governance (ESG) research to his role as director. He has played a key role in the development of Sustainalyt [Read More...](#) ([agenda/conference-presenters/speaker-bio.html?objectID=30](#))



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Mark Regier (agenda/conference-presenters/speaker-bio.html?objectID=31)

Director of Stewardship Investing, Praxis Mutual Funds; Everence Financial

Mark Regier is Director of Stewardship Investing for Praxis Mutual Funds and Everence Financial, a leading provider of faith-based financial products in the United States and a ministry of Mennonite Church USA. He oversees the company's investment sc Read More... (agenda/conference-presenters/speaker-bio.html?objectID=31)



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Heike Reichelt ([agenda/conference-presenters/speaker-bio.html?objectID=32](#))

Head of Investor Relations and New Products, Capital Markets Department, The World Bank

Heike Reichelt is Head of Investor Relations and New Products at the World Bank. Her team's responsibilities include managing relationships with bond investors and rating agencies, and developing new debt products for investors – such as for climate [Read More...](#) ([agenda/conference-presenters/speaker-bio.html?objectID=32](#))



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Bill Ritter Jr. ([agenda/conference-presenters/speaker-bio.html?objectID=46](#))

Founder and Director, Center for the New Energy Economy, Colorado State University

Bill Ritter Jr. is the Founding and current Director of the Center for the New Energy Economy (CNEE) at Colorado State University. He was elected as Colorado's 41st governor in 2006 – the first Colorado-born governor in more than 35 years. During h [Read More...](#) ([agenda/conference-presenters/speaker-bio.html?objectID=46](#))



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Ryan Salmon (agenda/conference-presenters/speaker-bio.html?objectID=6)

Senior Manager of the Oil & Gas Program, Ceres

Ryan Salmon is Senior Manager of the Oil & Gas Program at Ceres, where he works with investors, companies and policy-makers to address the oil and gas industry's impacts on climate change, air and water quality, biodiversity and communities. He foc Read More... (agenda/conference-presenters/speaker-bio.html?objectID=6)



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Leslie Samuelrich (agenda/conference-presenters/speaker-bio.html?objectID=34)

President, Green Century Capital Management

Leslie Samuelrich is President of Green Century Capital Management leading the Funds' investment strategies and overseeing Green Century's business development, communications and shareholder advocacy. Prior to joining Green Century in 2012, Ms. Samu Read More... (agenda/conference-presenters/speaker-bio.html?objectID=34)



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Charles Sandmel (agenda/conference-presenters/speaker-bio.html?objectID=33)

Investment Advisor Representative, First Affirmative Financial Network

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David Schilling (agenda/conference-presenters/speaker-bio.html?objectID=9)

Senior Program Director of Human Rights, Interfaith Center on Corporate Responsibility

David Schilling has worked at the Interfaith Center on Corporate Responsibility (ICCR) since 1994 and is Senior Program Director of Human Rights. He has pushed for corporate accountability on issues of human and labor rights in the contract supplier Read More... (agenda/conference-presenters/speaker-bio.html?objectID=9)



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Fran Seegull (agenda/conference-presenters/speaker-bio.html?objectID=35)

Chief Investment Officer, Managing Director, ImpactAssets

Fran Seegull is Chief Investment Officer and Managing Director at ImpactAssets—a non-profit investment firm seeking to increase the flow of capital to impact investing. She oversees firm product development and heads investment management for The Giv Read More... (agenda/conference-presenters/speaker-bio.html?objectID=35)



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Henry Shilling (agenda/conference-presenters/speaker-bio.html?objectID=39)

Senior Vice President, Global Managed Investments, Moody's

Henry Shilling has been with Moody's Corporation since 1992. In May 2013, he joined the Social Performance Group (SPG), part of Moody's Analytics, with a broad mandate to explore the sustainable and responsible investing (SRI) field. Previously at M Read More... (agenda/conference-presenters/speaker-bio.html?objectID=39)



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Ian Simm (agenda/conference-presenters/speaker-bio.html?objectID=36)

Chief Executive Officer, Impax Asset Management

Ian Simm is the Founder and Chief Executive Officer of Impax Asset Management Group plc. He has been responsible for building Impax since launch in 1998, and he continues to head the firm's investment committees. Prior to Impax, Mr. Simm was an eng Read More... (agenda/conference-presenters/speaker-bio.html?objectID=36)



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Marcie Smith (agenda/conference-presenters/speaker-bio.html?objectID=38)

Chief Executive Officer, Responsible Endowments Coalition

Marcie Smith is the Chief Executive Officer of the Responsible Endowments Coalition. She is a movement-builder working at the intersection of solidarity economics, climate justice, gender, and the law. Over the past four years, she has been focused Read More... (agenda/conference-presenters/speaker-bio.html?objectID=38)



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Rob Wilson (agenda/conference-presenters/speaker-bio.html?objectID=59)

Institutional Portfolio Analyst, MFS Investment Management

Rob Wilson is an investment officer and institutional portfolio analyst at MFS Investment Management®(MFS®) . His primary role involves working with the firm's analysts and portfolio managers to integrate environmental, social and governance (ESG) is Read More... (agenda/conference-presenters/speaker-bio.html?objectID=59)

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