


IMPACT INVESTING FORUM

APRIL 17-19, 2016 PALM BEACH GARDENS, FL



Sunday, April 17, 2016

12:00 pm	<p>112th U.S. Open Semi Finals</p> <p>International Polo Club Palm Beach</p>  <p>Come and enjoy the U.S. Open Polo Championship, considered to be the most prestigious polo tournament in the world, fabulous cuisine, entertainment, fashion, and world-class celebrities featured at International Polo Club Palm Beach. It is the exciting culmination of the 16-week, high-goal winter polo season that attracts polo enthusiasts from over 20 countries and 49 states.</p> <p>Sponsored by:</p>
12:45 pm	<p>Brunch</p>
3:00 pm	<p>Polo Match Begins</p>
3:45 pm	<p>Half- Time Champagne Stomping of the Divots</p>
5:00 pm	<p>Polo Match Finishes</p>
5:15 pm	<p>Trophy Presentations</p>
5:30 pm	<p>Return to PGA National Resort & Spa</p>

6:00 pm – 8:00 pm	Exhibit Hall Set Up
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Monday, April 18 2016

7:00 am	Exhibit Hall Open
7:00 am	Registration Opens
7:00 am	Breakfast Opens
7:45 am – 8:00 am	Co-Chair Opening Remarks Founder and CEO, The Wealth & Family Management Group Managing Partner, City Light Capital, Co-Founder, The Impact
8:00 am – 8:45 am	Defining the Responsible / Impact Investment landscape <ul style="list-style-type: none"> • Breaking down what ESG is across asset classes • How do we define Impact Investing today versus SRI/ESG? • How should it be properly branded within the Impact space? • What are the legal structures? • How does it tie into philanthropy? • Fiduciary Responsibility <p>Moderator: Founder and CEO, The Wealth & Family Management Group</p> <p>Panelists: President, Pathstone Federal Street (MFO) Founder and Managing Director, Shore to Shore Advisory Managing Director, Kordant Philanthropy Advisors</p>
8:45 am – 9:30 am	The evolution impact investing: What are the new strategies that employ Impact investing within the platform? <ul style="list-style-type: none"> • Sustainability • Global trends and the opportunities internationally • Looking at education tech • Addressing Cash and Guarantees as asset classes • Looking at risk within each asset class • What is the new range of offerings? • What is the shift in the marketplace?

	<p>Moderator: CEO, Ferguson Family Office (SFO)</p> <p>Panelists: Vice President, Investment Partnerships, Calvert Social Investment Foundation Partner, Promus Capital (MFO)</p>
9:30 am – 10:15 am	<p>Looking at Opportunities in Private Debt and Real Assets</p> <p>Moderator: Managing Member, Value Investment Professionals (MFO)</p> <p>Panelists: Senior Associate, Strenta Investment Management Inc. (MFO) Senior Investment Analyst/Vice-President, Cheltenham Investments (SFO)</p>
10:15 am – 10:30 am	<p>Networking Break Sponsored By: TriLinc Global, LLC</p>
10:30 am – 11:15 am	<p>Portfolio Construction: Aligning investments with your mission</p> <ul style="list-style-type: none"> • How do you appropriate an investment portfolio that accounts for having a social good/impact component? • Balancing returns that allow you to do impact investing and still get your needed returns • Implementing the Strategy: Life Cycle of an Impact Investment • Accountability: How do you measure results? • How do you make the case to your committee to go into impact and become a champion in the space? • Addressing Risk <p>Moderator: CEO, Partner, Trypuc Philanthropic Office</p> <p>Panelists: President, Karma Capital CEO & Founder, Pepper International LLC (MFO) Managing Director – Impact Investing, Align Impact Consultant and Co-Chair of the Impact Research Group, NEPC, LLC</p>
11:15 am – 11:45 pm	<p>Standalone</p>
11:45 am – 12:15 pm	<p>Harnessing the power of capital markets to bring about significant, sustainable change. With nearly \$100 trillion in global investable assets, it is essential that we bring the power of</p>

	<p>capital markets to achieve significant, sustainable change.</p> <p>Systemic change in sustainable and impact investing requires:</p> <ul style="list-style-type: none"> • Achieving scale • Encouraging broad participation of other capital markets investors • Effectively managing risk <p>In this session, Gloria will discuss both the opportunity and the imperative for bringing about transformative change and how individual investors can use the power they have to set a new standard for capitalism by holding companies to a higher standard of transparency and accountability. She will examine the role the capital markets can play in helping to solve some of the world's pressing economic, social and environmental challenges and offer a simple method for evaluating sustainable and impact investments.</p> <p style="text-align: center;">Keynote Speaker:</p> <p style="text-align: center;">Chairman & CEO, TriLinc Global, LLC</p>
12:15 pm – 1:30 pm	<p style="text-align: center;">Networking Luncheon</p> <p style="text-align: center;">Keynote Speaker:</p>
1:30 pm – 2:00 pm	<p style="text-align: center;">Creating Social and Environmental Impact Across Asset Classes</p> <p style="text-align: center;">Keynote Speaker:</p> <p style="text-align: center;">CFA, CEO & Portfolio Manager, Trillium Asset Management</p>
2:00 pm – 2:45 pm	<p>Looking at Opportunities in Public Equities and Fixed Income</p> <p>Moderator: Director of Investment Research and Strategy (CIO/CCO), O'Brien Management, LLC (SFO)</p> <p>Panelists: CEO, Cooper Family Office (SFO) Director of Socially Responsible Investing & President, Zevin Asset Management, LLC</p>
2:45 pm – 3:30 pm	<p>Looking at Opportunities in Private Equity and Venture Capital</p> <p>Moderator: Partner, Alpha Venture Partners / Pritzker Group Venture Capital (SFO)</p> <p>Panelists: , Co-Founder, GSV Shared-X</p>

	Head of SRII, Head of Family Governance, Sandaire (MFO)
3:30 pm – 4:15 pm	ESG Strategies and SRI (Social Responsible Investments) Strategies <ul style="list-style-type: none"> Defining between the two models How do you incorporate it across your portfolio? Private market direct deals in the ESG and SRI models <p>Moderator: CIMA, Managing Director, Institutional Consulting Director, Graystone Consulting-Houston</p> <p>Panelists: Principal, Intentional Endowments Network Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO) Director of Programs and Policy, US SIF - The Forum for Sustainable and Responsible Investment</p>
4:15 pm – 4:30 pm	Networking Break Sponsored By:
4:30 pm – 5:15 pm	Using Pay for Success / Social Impact Bonds <p>The panel will respond to growing interest from investors looking to understand the mechanics of the model and opportunities in the space. A diverse perspective will be offered; you will learn the motivations of service providers, government and other investors. This interactive panel will answer practical investment questions and prognosticate on the future of the Pay for Success instrument</p> <ul style="list-style-type: none"> Impact investing recognized as an emerging asset class globally Pay for Success, one impact investment opportunity, has gained significant attention by governments in the last 5 years who are looking to drive better value for funded social services. A global perspective will be offered; US, Canada, and the UK all have developed projects. <p>Moderator: Director, MaRs Centre for Impact Investing</p> <p>Panelists: Managing Director, Sorenson Impact Center, David Eccles School of Business, University of Utah</p>
5:15 pm – 6:00 pm	The next generation of impact investors <ul style="list-style-type: none"> What do Millennials and the Z Generation want and what challenges do they face? Defining the types of investors

	<ul style="list-style-type: none"> How to engage the next generation of impact investors <p>Moderator: Founder, Tamarind Partners Inc.</p> <p>Panelists: Founder and CEO, Bonaventure Equity, LLC Vice President, Canterbury Consulting Director of Family Governance and Education, WE Family Offices (MFO)</p>
6:00 pm – 6:30 pm	<p>Keynote Speakers:</p> <p>Managing Partner, City Light Capital, Co-Founder, The Impact Co-Founder and Principal, Blue Haven Initiative (SFO)</p>
6:30 pm – 7:30 pm	<p>Cocktail Reception</p> <p>Sponsored by:</p>

Tuesday, April 19th

7:00 am	Breakfast opens
7:30 am	Opening Remarks
7:30 am – 9:00 am	<p>Open Breakfast Workshop:</p> <p>The Role of Data Gathering In the Impact Space: What to Measure and How</p> <ul style="list-style-type: none"> Selecting and Managing Advisors How do you do due diligence? What is the frame work? Factors to consider Tools for reporting and research <p>Facilitated by: Senior Fellow, Initiative for Responsible Investment, Harvard University</p>
9:00 am – 9:30 am	<p>Keynote Speaker:</p> <p>Investment, Innovation, and the New Development Model</p>

	General Counsel, U.S. Agency for International Development
9:30 am – 10:15 am	<p>Program Related Investments (PRI) and Mission Related Investing (MRI)</p> <ul style="list-style-type: none"> • What are the differences between a PRI, MRI, and SRI? • Assuming that a funder or foundation is committed to values based and impact investing, where should these vehicles fit in their philanthropy strategy and investment strategies? • Which funders are most appropriate to use these vehicles? Are there funders who would be advised to stay away? • Are there some models of real successful use of these vehicles? What about examples where it didn't work? • How does one identify potential viable places, businesses, or organizations to use these vehicles? Is it all a matter of doing a lot of work on your own or are there groups who have already done the due diligence? • Funders have different attitudes toward "going it alone" vs. "collaboration". Do MRI/SRI/PRI vehicles lend themselves better to one or the other? • Impact Evaluation Designs that can be Applied to MRI/SRI/PRI Vehicles. <p>Moderator: Co-principal/Founder, Wise Philanthropy and NYU Academy for Grantmaking & Funder Education</p> <p>Panelists: Executive Director, Washington Square Health Foundation Senior Advisor, The Bill and Melinda Gates Foundation Director, Center for High Impact Philanthropy</p>
10:15 am – 10:45 am	<p>Keynote Speaker:</p> <p>Accelerating Pediatric Innovation: The Ultimate Impact Investment for Healthier Communities</p> <p>Director, Center for Innovation, Children's Hospital Los Angeles</p>
10:45 am – 11:00 am	<p>Networking Break Sponsored By:</p>
11:00 am – 11:30 am	<p>Introducing a new Asset Class: "Stateless" Infrastructure.</p> <p>WatershipBlue is a modern day "Manhattan" project that consists of the of the smartest minds in technology, engineering, environmental sciences, project finance, and a smattering of Admirals and Generals who are using human ingenuity to solve the one problem facing humanity that actually has a solution: potable water.</p> <p>WatershipBlue is building a fleet of Waterships outfitted with state of the art technology utilizing wind, solar, hydro, and natural gas to produce fresh water and power from permanently moored</p>

	<p>offshore locations. "Stateless" means that these mobile platforms can disconnect the from the grids and move if situations change, allowing for infrastructure investment without the pesky country risk.</p> <p style="text-align: center;">Keynote Speaker: President, The Rotter Family Trust (SFO), Chairman, Watership Blue</p>
11:30 am – 12:15 pm	<p>Values Based Investing and the Role of the Shareholder</p> <ul style="list-style-type: none"> • How do you define values based investing vs. impact investing and philanthropy? • What are motivations and rewards for values based investing? • How do you measure results of values based investing • Success cases and failure cases • Shareholder activism and its implication <p>Moderator: Managing Director, Aster Family Advisors (MFO)</p> <p>Panelists: Founder, V V Strategic Group Founder & CEO, SolveForGood</p>
12:15 pm – 1:00 pm	<p>Place Based Challenges</p> <ul style="list-style-type: none"> • Overview of key challenges from people to local customs and regulations • How balance expertise, cost and culture carry of sending out personnel vs. local talent • How to access local public and private funds and other support • How to partner with local and global organizations for synergies and local infrastructure support • How do you leverage social media and other technology locally and from the U.S.? • How do you recruit expertise from potential advisors and board members? <p>Moderator: President/CIO, Member of the Investment Committee, AltaCap (SFO)</p> <p>Panelists: Senior Officer, Investor Relations, Calvert Social Investment Foundation Family Office Executive, Greenway Family Office (MFO) W.K. Kellogg Chair in Community Philanthropy, Dorothy A. Johnson Center for Philanthropy, Grand Valley State University</p>
1:00 pm -	<p style="text-align: center;">Golf Outing</p> <p style="text-align: center;">Sponsored by:</p>

