

IMPACT INVESTING FORUM

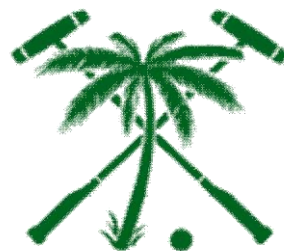
APRIL 23-25, 2017 BOCA RATON RESORT & CLUB
BOCA RATON, FL



SUNDAY - APRIL 23, 2017

12:00 PM

113TH U.S. OPEN QUARTER FINALS



INTERNATIONAL POLO CLUB PALM BEACH

Come and enjoy the U.S. Open Polo Championship! 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.

Sponsored by:

12:45 PM

BRUNCH

3:00 PM

POLO MATCH BEGINS

3:45 PM

HALF-TIME CHAMPAGNE – STOMPING OF THE DIVOTS

5:00 PM

POLO MATCH FINISHES

5:15 PM

TROPHY PRESENTATIONS

5:30 PM

RETURN TO BOCA RATON RESORT & CLUB

6:00 PM– 8:00 PM

EXHIBIT HALL SET UP

MONDAY – APRIL 24, 2017

7:00 AM	EXHIBIT HALL OPENS
7:00 AM	REGISTRATION & BREAKFAST
7:45 AM-8:00 AM	CO-CHAIR OPENING REMARKS BY: Tami Kesselman, Founder & CEO, TBL Alpha Advisory Christine Mendonça, Founder and Managing Director, Shore to Shore Advisory
8:00 AM-8:45 AM	DEFINING THE EVOLUTION OF IMPACT INVESTING FOR THE NEXT GENERATION <ul style="list-style-type: none">• How do we/they (millennials) define Impact Investing? What is it about impact investing and millennial mentality that is gelling together so well?• Does the term impact investing mean the same thing to a next gen around age 30 and their 60 year old parent? Why or why not?• How has technology played a role in the next generation's access and view on world issues that has in turn affected how they consume and invest their money?• It's hard to contest that impact investing has grown immensely in the past 5-10 years, why do we think that is? Is it because of next gen investors deploying more capital or the traditional investor and/or advisor coming around? And/or are foundations aligning their program related activities and the corpus/endowment as the next generation engages in their family foundations.• When looking to the future, how do we think impact investing will evolve both domestically and internationally? What issue areas do we think we have the potential to actually solve global problems and why?• The role of impact investing post 2016 election <p>Moderator: Jennifer Kenning, Managing Director – Impact Investing, Impact Align</p> <p>Panelists:</p>
8:45 AM-9:30 AM	HOW RESPONSIBLE INVESTMENTS CAN DRIVE GROWTH IN ALTERNATIVE ASSETS Moderator: Panelists:
9:30AM-10:15AM	INNOVATION IN PORTFOLIO CONSTRUCTION: PREVENTING YOUR PORTFOLIO'S INVESTMENTS FROM WORKING AGAINST YOUR VALUES Moderator: Panelists: Carol Pepper, Founder & CEO, Pepper International LLC (MFO)

10:15AM-10:30AM	NETWORKING BREAK Sponsored by:
10:30AM-11:15AM	LOOKING AT OPPORTUNITIES IN PRIVATE DEBT AND REAL ASSETS Moderator: Panelists:
11:15AM-11:35AM	STANDALONE
11:35AM-11:55AM	STANDALONE
11:55AM-12:15PM	STANDALONE
12:15PM-1:30PM	NETWORKING LUNCHEON KEYNOTE SPEAKER: TBA
1:30PM-2:30PM	BREAKING DOWN ESG STRATEGIES AND SRI (SOCIAL RESPONSIBLE INVESTMENTS) STRATEGIES <ul style="list-style-type: none"> • Break down of what ESG is across asset classes • Defining between the two models • How do you incorporate it across your portfolio? • Private market deals in ESG and SRI models • Integrating ESG and sustainability objectives into all portfolios • Bringing ESG to frontier markets through public & private investments Moderator: Panelists:
2:30PM-3:30PM	NAVIGATING THE OPPORTUNITIES AND RISKS IN REAL ESTATE Moderator: Panelists:

3:30PM-4:30PM	GENERATING ALPHA THROUGH PRIVATE EQUITY AND VENTURE CAPITAL Moderator: Panelists:
4:30PM-4:45PM	NETWORKING BREAK Sponsored by:
4:45PM-5:45PM	FIXED INCOME AND CREDIT 3.0: NAVIGATING OPPORTUNITIES IN THE PUBLIC MARKET FOR RESPONSIBLE INVESTORS Moderator: Brandon Laughren, Chief Investment Officer, The Laughren Group (SFO) Panelists:
5:45PM-6:30PM	VALUES-BASED INVESTING VS. IMPACT INVESTING Moderator: Biff Pusey, Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO) Panelists:
6:30 PM-7:30 PM	COCKTAIL RECEPTION

TUESDAY – APRIL 25, 2017

7:00 AM	BREAKFAST Sponsored by:
7:00 AM	Open Breakfast Workshop: ACCOUNTABILITY, TRANSPARENCY AND MEASURING SUCCESS Facilitated by:
8:50 AM	OPENING REMARKS

9:00 AM-10:00AM	IMPACTFUL TECHNOLOGY SHOWCASE: INVESTMENTS THAT CHANGE THE FUTURE Moderator: Panelists:
10:00AM-10:20AM	STANDALONE
10:20AM-10:40AM	STANDALONE
10:40AM-11:00AM	STANDALONE
11:00AM-11:15AM	NETWORKING BREAK Sponsored by:
11:15AM-12:00PM	PROGRAM RELATED INVESTMENTS (PRI) AND MISSION RELATED INVESTING (MRI) Moderator: Panelists:
12:00PM-12:45PM	THE UN SUSTAINABLE DEVELOPMENT GOALS: WHAT THEY MEAN FOR YOUR INVESTMENT PORTFOLIO Moderator: Panelists:
12:45PM-1:30PM	A LOOK PLACE BASED AND FAITH BASED CHALLENGES Moderator: Panelists:
1:30PM	CONFERENCE CONCLUDES