



**WEDNESDAY, JUNE 23RD, 2021**

- 3:00 PM - 3:30 PM      **The Future of ESG: Trends, Themes and Expectations**  
Erika Karp, Executive Managing Director, Chief Impact Officer, Pathstone  
Lloyd Kurtz, Sr. Investment Manager, Wells Fargo  
Andrew Lee, Head of Sustainable and Impact Investing, UBS Global Wealth Management, Chief Investment Office  
Moderated By: Leslie Norton, Senior Writer, Barron's
- 3:30 PM - 4:00 PM      **The Investment Pathway to a Net Zero Carbon Future**  
Megan Fielding, Senior Director, Responsible Investing, Nuveen  
Fabian Willskytt, Manager, Public Market Research, Align Impact
- 4:00 PM - 4:30 PM      **Maximizing Impact Without Minimizing Returns: Speaking to Clients About ESG**  
Bud Sturmak, Co-CIO, Perigon Wealth Advisors  
LeEric Daye, Senior Wealth Advisor, Beacon Pointe Advisors  
Moderated By: Jack Otter, Global Head, Wealth & Asset Management, Barron's Group
- 4:30 PM - 5:00 PM      **Sustainable Alpha**  
Keith Dixson, Head of International Business Development, CANDRIAM  
Moderated By: Wendy Wong, Managing Director, New York Life Investments

**BREAKOUT LIVE Q&A SESSIONS**

- 4:00 PM - 4:30 PM      **Live Q&A Breakout: The Investment Pathway to a Net Zero Carbon Future**  
Megan Fielding, Senior Director, Responsible Investing, Nuveen  
Fabian Willskytt, Manager, Public Market Research, Align Impact
- 5:00 PM - 5:30 PM      **Live Q&A Breakout: Sustainable Alpha**  
Keith Dixson, Head of International Business Development, CANDRIAM  
Wendy Wong, Managing Director, New York Life Investments



**THURSDAY, JUNE 24TH, 2021**

- 2:30 PM - 3:00 PM**      **The Biggest Myths About ESG Investing, and How to Counter Them**  
Jon Hale, Director of ESG Strategy, Morningstar, Inc.  
Interviewed By: Beverly Goodman, Editorial Director, Barron's
- 3:00 PM - 3:30 PM**      **Implementing Impact Investing**  
Jeffrey Gitterman, Co-Founding Partner, Gitterman Wealth Management  
Christy Covalesky, Wealth Manager & Shareholder, Wetherby Asset Management  
Jackie VanderBrug, Head of Sustainable & Impact Investment Strategy, Bank of America  
Moderated By: Beverly Goodman, Editorial Director, Barron's
- 3:30 PM - 4:00 PM**      **Leveraging Technology and Data to Align Investments with Client Values**  
Jake Raden, Senior Director of Financial Product & Head of ESG, OpenInvest,  
Sponsored By Resolute Investment Managers, Inc.
- 4:00 PM - 4:30 PM**      **Getting Real on the Intersection of Philanthropy, Investing, and Impact**  
T.J. King, First Vice President, Wealth Management, Raymond James  
Kate Williams, CEO, 1% for the Planet  
Moderated By: Andrea Masterson, Director of Corporate Responsibility, Raymond James
- 4:30 PM - 5:00 PM**      **Establishing Impactful, Entrepreneurial Values: A Conversation with Lauren Bush Lauren**  
Lauren Bush Lauren, Founder and CEO of FEED  
Interviewed By: Jack Otter, Global Head, Wealth & Asset Management, Barron's Group

**BREAKOUT LIVE Q&A SESSIONS**

- 4:00 PM - 4:30 PM**      **Live Q&A Breakout: Leveraging Technology and Data to Align Investments with Client Values**  
Jake Raden, Senior Director of Financial Product & Head of ESG, OpenInvest,  
Sponsored By Resolute Investment Managers, Inc.