

## WEDNESDAY, JUNE 22, 2022

8:00 AM – 5:00 PM

### REGISTRATION

The Forum

8:00 AM – 9:00 AM

### BREAKFAST

The Forum

9:00 AM – 9:10 AM

### WELCOME ADDRESS

The Forum

Welcome Remarks

**Jack Otter**, Global Head, Wealth & Asset Management, Barron's Group

9:10 AM – 9:50 AM

### GENERAL SESSION

The Forum

How a Pioneering Activist is Turning Sustainability into a Competitive Edge

**Yasmin Dahya Bilger**, Head of ETFs, Engine No. 1

Interviewer: **Beverly Goodman**, Editor in Chief, TIAA

9:50 AM – 10:40 AM

### GENERAL SESSION

The Forum

Taking Politics Out of ESG

**Mary Green**, Client Portfolio Manager ESG & Hermes, Federated Hermes

Interviewer: **Maryellen Frank**, Account Vice President, Wealth Management, UBS Private Wealth Management

CFP I-W

10:40 AM – 10:55 AM

### REFRESHMENT BREAK

The Forum

10:55 AM – 11:45 AM

### GENERAL SESSION

The Forum

How to Discuss Sustainable Investing with True Believers and Skeptics

**Lynette Jefferson**, Head, Sustainable & Inclusive Investing, UBS Financial Services, Inc.

**Sarah Norman**, Director, Senior Investment Strategist, Merrill and Bank of America Private Bank

Moderator: **Amey Stone**, Editor, Barron's Advisor

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11:45 AM – 1:20 PM

### LUNCH

The Forum

# ESG+IMPACT SUMMIT

June 22, 2022

Convene | 237 Park Avenue, NYC

1:20 PM – 2:10 PM

The Forum

## GENERAL SESSION

ESG in a World Defined by Upheaval

**Jeff Gitterman**, Gitterman Asset Management

**Heidi Richardson**, Graystone Consulting, a business of Morgan Stanley

**Bud Sturmak**, Perigon Wealth Management, LLC

Moderator: **Clara Sierra**, Senior Director, Business Development, Moody's Analytics

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2:10 PM – 3:00 PM

The Forum

## GENERAL SESSION

Building and Monitoring ESG and Climate Aware Portfolios

**Sohini Chowdhury**, Director and Senior Economist, Moody's Analytics

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3:00 PM – 3:20 PM

The Forum

## REFRESHMENT BREAK

3:20 PM – 4:10 PM

The Forum

## GENERAL SESSION

How to Recognize and Deter Greenwashing From Further Eroding Faith in ESG

**Lily Trager**, Managing Director and Head of Investing with Impact, Morgan Stanley Wealth Management

**Dan Wanstreet**, SVP, Director of ESG Strategy, Wells Fargo Investment Institute

Moderator: **Leslie Norton**, Editorial Director, Sustainability, Morningstar

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4:10 PM – 5:00 PM

The Forum

## GENERAL SESSION

Themes Driving Sustainability Today

**Alexandra Hirsch**, Director, BlackRock

Interviewer: **Jack Otter**, Global Head, Wealth & Asset Management, Barron's Group

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5:00 PM – 6:30 PM

The Forum

## COCKTAIL RECEPTION