



**ESG Summit  
For Institutional Shareholders,  
Public Company Management and Capital Markets Experts**

**Nasdaq MarketSite  
4 Times Square  
New York, NY  
June 19, 2015**

**Program Agenda**

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- 8:30 – 8:45 AM**      **Breakfast, Registration, Welcoming & Opening Remarks**  
Christopher P. Skroupa, Founder & CEO, Skytop Strategies  
Evan Harvey, Director of Corporate Responsibility, Nasdaq
- 8:45 – 9:05**      **Opening Keynote**  
José María Figueres, Former President, Costa Rica,  
Chairman of the Board, Rocky Mountain Institute & Carbon War Room
- 9:05 – 9:20**      **Profiles of ESG Ratings, Worldwide**  
**Presenter:**  
Mark Tulay, Program Director & COO, GISR
- 9:20 – 10:00**      **The Changing Understanding of Company ESG Strategies, Performance and Recognition by Capital Markets Experts**  
**Moderator:**  
Erika Karp, Founder and CEO, Cornerstone Capital Group  
**Panelists:**  
TerriJo Saarela, Corporate Governance Director, State of Wisconsin Investment Board  
Michael Garland, Assistant Comptroller, Corporate Governance & Responsible Investment, New York City Office of the Comptroller Scott M. Stringer  
Robert McGarrah, Counsel, Office of Investment, AFL-CIO

**10:00 – 10:40**

**Identifying How Integration of ESG Factors Can Help Mitigate Risk and Expand Opportunities**

**Moderator:**

Katherine W. Schrank, J.D, IEMA Certified Sustainability Practitioner, Sustainability Partners, Inc.

**Panelists:**

Scott Zdrazil, Director of Strategy and Corporate Engagement, Office of New York City Comptroller Scott M. Stringer  
Bureau of Asset Management- Corporate Governance and Responsible Investment Unit

Jamie Rantanen, Director, Deutsche Bank

Bruce M. Kahn, Portfolio Manager, Sustainable Insight Capital Management

Linda-Eling Lee, Executive Director and Global Head of ESG Research, MSCI

**10:40 – 10:55**

**Refreshment Break**

**10:55 – 11:35**

**Perspectives on ESG Disclosure: Investor Need vs. Company Ability**

**Moderator:**

Tracey Rembert, Senior Manager of Investor Engagement, Ceres

**Panelists:**

Simon MacMahon, Global Director, Advisory Services, Sustainalytics

Dan Winters, Head of North America, GRESB

Chris Fowle, Vice President, Investor Initiatives, CDP North America

Louis Malizia, Assistant Director-Capital Strategies, International Brotherhood of Teamsters

**11:35 – 12:15 PM**

**Addressing the Expectations of the Marketplace: The Challenge of Managing Against Undefined or Rapidly Reshaping ESG Performance and Reporting Expectations**

**Moderator:**

Stephen L. Brown, Principal, Edgerton Group, LLC & Special Advisor, Skytop Strategies

**Panelists:**

Paula Luff, Vice President, Corporate Social Responsibility, Hess Corporation

Daniel L. Goelzer, Partner, Baker & McKenzie LLP

Kathryn Caulfield, Vice President, Global Corporate Communications & Responsibility, The Clorox Company

Laurence Hazell, Director, Governance, Standard & Poor's Ratings Services

**12:15 – 12:55**

**Technology: How Today's Tools and Resources Help Both Companies and Institutional Shareholders Evaluate and Quantify Good ESG Performance**

**Introduction:**

Marjella Alma, Chief Executive Officer, eRevalue

**Moderator:**

Marjella Alma, Chief Executive Officer, eRevalue

**Panelists:**

Hideki Suzuki, Senior Corporate Governance Analyst, Bloomberg LP

Christopher Weber, Research Associate, World Resources Institute

Hendrik Bartel, Co-founder & CEO, TruValue Labs

**12:55 – 1:30**

**Networking Lunch**

**1:30 – 2:10**

**The Language of ESG and Sustainability: The Opportunity to Create a Shared Vocabulary Between Mainstream Asset Managers and SRI**

**Moderator:**

Evan Harvey, Director of Corporate Responsibility, Nasdaq

**Panelists:**

Cambria Allen, Corporate Governance Director, UAW Retiree Medical Benefits Trust

Marisa Buchanan, Vice President, Sustainable Finance, JPMorgan Chase

Stu Dalheim, Vice President, Shareholder Advocacy, Calvert Investments

Michael Meehan, Chief Executive Officer, Global Reporting Initiative

**2:10 – 2:50**

**Increasing Value and Enhancing Competitive Edge: How Does ESG Integration Help Companies Reduce Costs, Enhance Operational Efficiencies, Conserve Use of Natural Resources and Build a Sustainable Supply Chain**

**Moderator:**

Louis Coppola, Executive Vice President & Partner, Governance & Accountability Institute, Inc.

**Panelists:**

Brian A. Rice, Portfolio Manager, Corporate Governance, California State Teachers' Retirement System

Matt Swibel, Director, Corporate Sustainability, Lockheed Martin

Michael Muyot, President, CRD Analytics

**2:50 – 3:05**

**Refreshment Break**

**3:05 – 3:45**

**The ESG Implementation Challenge: Proving the Investment Case and the Business Case for ESG Integration**

**Moderator:**

Mark Tulay, Program Director & COO, GISR

**Panelists:**

John K.S. Wilson, Head of Corporate Governance, Engagement and Research, Cornerstone Capital Group

Henry Shilling, Senior Vice President, Moody Analytics

David Hackett, Partner, Baker & McKenzie LLP

**3:45 – 3:55**

**Investment Consultant View on ESG**

**Presenter:**

Scott Perry, CAIA, Partner, Endowment & Foundation Team, NEPC, LLC

**3:55 – 4:35**

**What Matters to Asset Managers When It Comes to ESG**

**Moderator:**

Scott Perry, CAIA, Partner, Endowment & Foundation Team, NEPC, LLC

**Panelists:**

Brace Young, CEO, Mariner Investment Group

Christopher McKnett, Managing Director & Head of ESG Portfolio Strategy, State Street Global Advisors

Adam Blumenthal, Co-Founder and Managing Director, Blue Wolf Capital Partners

**4:35 – 5:15**

**Getting Buy-In from the Market Analyst: How to Connect ESG Performance with Traditional Portfolio Management**

**Moderator:**

Michael Greis, CFA, Principal, Riverbend Advisors

**Panelists:**

Adam Fleck, CFA, Director, Consumer Equity Research, Morningstar, Inc.

Rob Wilson, Research Analyst, MFS Investment Management

Keith A. Mills, CFA, Partner, Director of Research & Research Analyst, Trillium Asset Management

**5:15**

**Summit Wrap-Up**

Christopher P. Skroupa, Founder & CEO, Skytop Strategies

Evan Harvey, Director of Corporate Responsibility, Nasdaq

**5:15 – 6:00**

**Networking Reception**

Marjella Alma, Chief Executive Officer, eRevalue