

Pre-Conference Summit Camp Agenda and Schedule of Events, November 7–9, 2016

CE = to be submitted for continuing education credit for CFPs, CIMAs, and CFAs

Monday, November 7, 2016	
12:00pm – 6:00pm	Summit Camp Registration Open
12:00pm – 1:30pm	First-Timer LUNCH : Up Close and Personal ~ By Invitation ~
1:30pm – 2:30pm	Compliance Workshop ~ REQUIRED for First Affirmative IARs and Staff ~ Kathy Lewis
2:40pm – 4:30pm	Heard on the Street
4:40pm – 6:00pm	Advisor Update 2017 George Gay Sponsor: Saturna Capital
6:00pm – 6:15pm	Move to Grand Hyatt, Pinnacle Club, 38th Floor (Four-Block Walk)
6:00pm – 8:30pm	Cash Bar
6:30pm – 6:50pm	Awards and Recognitions
6:50pm – 7:30pm	Why We Do What We Do Ann-Marja Lander, David Bue, Steven Wallman Sponsor: Calvert Investments
7:30pm – 8:30pm	DINNER Sponsor: Pax World Investments
8:30pm – 9:00pm	Return to Hyatt Regency

Tuesday, November 8, 2016	
7:15am – 8:30am	BREAKFAST

8:30am – 9:30am	<p align="center"><i>The Three Laws of Money That Will Help Your Clients Make Better Investment Decisions (CE)</i> Sarah Newcomb Sponsor: Green Century Capital Management</p>	
9:40am – 10:30am	<p align="center"><i>Transformative Investing: From “SRI Jail” to Rehab (CE)</i> John Streur, Calvert Investment; Julie Gorte, Pax World Management; Moderator: Kevin O’Keefe</p>	
10:30am – 10:50am	<p align="center">BREAK</p>	
10:50am – 11:40am	<p align="center"><i>Unified Managed Accounts for Responsible Investors (CE)</i> Investment Committee</p>	<p align="center"><i>Working with Folio Institutional</i> Greg Vigrass</p>
11:40pm – 12:40pm	<p align="center">LUNCH Sponsor: Calvert Foundation</p>	
12:40pm – 1:30pm	<p align="center"><i>The Challenges of Fixed Income Investing in a Low Interest Rate Environment (CE)</i> William Mock, Shelton Capital Management; Mark Baker, SNW Asset Management; Patrick Drum, Saturna Capital; Moderator: Mel Miller, First Affirmative Financial Network</p>	
1:40pm – 2:10pm	<p align="center"><i>Shareowner Advocacy and Impact</i> Holly Testa, Laura Isanuk</p>	<p align="center"><i>The Power of the Folio Website</i> Greg Thornton</p>
2:20pm – 2:50pm	<p align="center"><i>The Future of Fees</i> Facilitator: Sonya Dreizler-Schinske</p>	<p align="center"><i>For Advisors: Having the SRI Conversation</i> Mike Sakraida</p>
2:50pm – 3:10pm	<p align="center">BREAK</p>	
3:10pm – 4:00pm	<p align="center"><i>ERISA: Changes, Challenges, and Opportunities (CE)</i> Greg Moerchen, QBox Feduciary Solutions; Kevin O’Keefe, First Affirmative Financial Network</p>	
4:10pm – 5:00pm	<p align="center"><i>SRI Managed Mutual Fund Portfolios Using Institutional Class Shares (CE?)</i> Investment Committee</p>	<p align="center"><i>Working with Folio Institutional</i> Greg Vigrass</p>
5:10pm – 6:00pm	<p align="center"><i>ESG Scoring of Mutual Funds and Investment Managers (CE?)</i> R. Kevin O’Keefe, CIMA</p>	<p align="center"><i>Perception Is Reality: Why Psychology Is a Cornerstone of Values-Based Investing</i> Sarah Newcomb</p>
6:00pm – 7:00pm	<p align="center">RECEPTION (Cash Bar) Sponsor: Trillium Asset Management</p>	
7:00pm ----	<p align="center">DINNER on Your Own Explore the many fine dining venues in or near the Hyatt!</p>	
7:00pm – 8:30pm	<p align="center">Focus Group Dinner ~ By Invitation ~</p>	
7:00pm – 11:00pm	<p align="center">~~~ Election Night Coverage / Conversation / Debate / Celebration ~~~</p>	

Wednesday, November 9, 2016

7:15am – 8:30am	BREAKFAST
8:15am – 9:45am	Manager “Popcorn” Presentations ~ Attendance Open to Anyone On Site ~
9:00am – 10:00am	PHOTO SHOOT: Headshots for all Staff and Advisors Photographers: Joey Finkbeiner, Laura Isanuk
8:00am – 6:00pm	Conference Registration / Information Desk Open Centennial Foyer
10:00am – 3:00pm	Sponsor Setup in the Exhibit Hall Mobile App Training with Sponsors
10:00am – 1:30pm	<i>Fundamentals of Sustainable and Responsible Investment</i> The Center for Sustainable Investment Education, US SIF Foundation ~ Separate Registration Required. Lunch Included. ~ Centennial F, G
10:00am – 1:00pm	Calvert Foundation Impact Investing Tour ~ Separate Registration Required. Lunch Included. ~
1:30 pm – 2:40pm	NEW PARTICIPANT ORIENTATION Mobile App Training
2:50pm – 3:40pm	<i>Economic Forecast: What Awaits Our New President?</i> (CE) Speaker: Mel Miller, CFA Centennial D, E
	~~~ See The SRI Conference Schedule of Events ~~~