

2017 ESG Investment Forum

Bank of America Conference Center, 225 Franklin St., 5th Floor, Boston, MA

Thursday, December 14, 2017 (agenda as of 12/11/2017)

9:30 a.m. – 10:00 a.m. **Conference Registration** – Bank of America, 225 Franklin Street, 5th Floor

10:00 a.m.– 10:10 a.m. **Welcome Remarks**
Miceal Chamberlain, Bank of America Massachusetts Market President & Head of Boston Global Markets

10:15 a.m. – 11:00 a.m. **ESG and Responsible Growth: The changing conversations in boardrooms and the C-Suite**
Speaker: Andrew Plepler, Head of Global ESG, Bank of America
Host: Miceal Chamberlain, Bank of America Massachusetts Market President & Head of Boston Global Markets

11:15 a.m. – 12:15 p.m. **ESG Investing - Best of Both Worlds: Generating alpha by investing responsibly**
Panelists:
Asha Mehta, Senior Vice President, Portfolio Manager, Acadian Asset Management
Jens Peers, CFA, Chief Investment Officer, Mirova
Katherine Collins, Head of Sustainable Investing, Putnam Investment Management
Quyen Tran, Equity Portfolio Specialist, Wellington Management Company, Llp
Tim Albright, Portfolio Manager, Summit Partners Sustainable Opportunities Fund & Partner, Summit Partners Public Equity Team
Moderator: Savita Subramanian, Head of U.S. Equity & Quantitative Strategy

12:30 p.m. – 1:30 p.m. **Lunch Presentation**
Technologic Disruption – From disintermediation to opportunities to ESG implications
Speaker: Sarj Nahal, Head of Global Thematic Investing Strategy Team

1:45 p.m.-2:45 p.m. **ESG & Merrill Lynch – Impact investing & innovative solutions: a view into Merrill Lynch’s distribution and manager selection platforms**
Speakers: Surya Kolluri, Head of Policy & Planning, Retirement & Wealth Solutions and Jackie Vanderbrug, Managing Director, Investment Strategist, Bank of America Global Wealth & Investment Management

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ESG & Asset Allocation – Endowments, family offices & consultants: aligning values and diversification

Panelists:

2:50 p.m. – 3:45 p.m. Allen Erickson, Founder and Managing Partner, Turtle Lane Partners
E. Douglas Huber, Senior Research Analyst, North American Management
Jeff Scheer, CFA, Director, Pathstone Federal Street
Kristine Pelletier, Senior Consultant, Co-Head of Impact Investing Committee, NEPC, LLC

Moderator: Omeed Malik, Head of Global Capital Introductions & Consulting

4:00 p.m. – 5:00 p.m. **Reception** – *Bank of America, 225 Franklin Street, 5th Floor*