

Practitioners Meeting 2012

Speakers' Biographies



Murat Armbruster
Senior Advisor
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Murat Armbruster is a founding partner of the clean technology hedge fund, Atlas Capital Investments, LP. After graduating from the University of Michigan with high honors, Murat launched GlobaLearn in 1993, the first K-12 eLearning website to help prepare our nation's children for global citizenship. GlobaLearn was acquired by Houghton Mifflin in 2001 and featured in Don Tapscott's bestselling *Growing Up Digital*. Murat represented the education sector as a member of the U.S. delegation led by Vice President Gore to the G-7 Information Society Summit. During the 2004 presidential campaign, he served as Deputy Executive Officer to General Wesley K. Clark during his bid to become the Democratic Party's nominee. In 2005, he was a founding partner and Chief Operating Officer of Adina for Life, a San Francisco-based beverage company focused on fair trade and sustainable business practices. Murat is a member of the Social Venture Network, has a black belt in karate, and speaks French and Mandarin.



Lucy Bernholz
Managing Director
Arabella Advisors
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Lucy Bernholz is a Managing Director at Arabella Advisors, a strategic advisory firm for philanthropists and impact investors. She joined Arabella in 2011 after selling them her 14-year old consulting firm, Blueprint Research & Design, Inc. She also is a Visiting Scholar at Stanford's Center on Philanthropy and Civil Society and the award winning blogger behind philanthropy2173.com. Bernholz is the author of numerous articles and books about the business of giving, including the *Blueprint Series: Annual Industry Forecasts on Philanthropy and Social Investing*, the 2010 publication [Disrupting Philanthropy](#), and her 2004 book [Creating Philanthropic Capital Markets: The Deliberate Evolution](#). She has a B.A. from Yale University, where she played field hockey and captained the lacrosse team, and an M.A. and Ph.D. from Stanford University.

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Suzanne Biegel
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Suzanne has been a long time angel investor member of Investors' Circle and served as its CEO in 2010-2011. For the past ten years, Suzanne has had her own consulting practice, Catalyst at Large. She has brought her visionary leadership as an entrepreneur, a coach and mentor, a board member, a philanthropist, and an active angel investor to a variety of sustainability-driven projects. She is a frequent public speaker and moderator in the realm of impact investing, sustainability, responsible business, and philanthropy. Suzanne was one of the co-founders of the Patient Capital Collaborative, a collaborative angel fund of Investors' Circle. Suzanne is a Catto Fellow at the Aspen Institute and an active member of other aligned networks including Social Venture Network and Women Donors' Network. A native New Yorker, Suzanne is now based in London, England, where she is helping to build a new impact angel network for ClearlySo. Suzanne holds degrees from the Wharton Business School and the Annenberg School of Communication.



Graciela Chichilnisky
Co-Founder & Managing Director,
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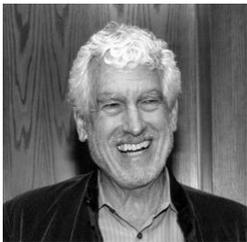
Graciela Chichilnisky is the author of the carbon market of the UN Kyoto Protocol that became international law in 2005. She created the concept of Basic Needs voted by 153 nations at the 1993 UN Earth Summit to be the cornerstone of Sustainable Development, and in 1996 created the formal theory of Sustainable Development that is used worldwide. Chichilnisky is a world renowned economist and mathematician that the Washington Post calls an "A-List Star" and appeared in the 2009 Time Magazine on "Heroes of the Environment". Chichilnisky acted as a US Lead Author of the Intergovernmental Panel on Climate Change, which received the 2007 Nobel Prize. A special adviser to several UN organizations, heads of state and US Congress, her pioneering work uses innovative market mechanisms to reduce carbon emissions, conserve biodiversity and ecosystem services. Chichilnisky is a Mathematics and Economics professor at Columbia University, the Director of Columbia Consortium for Risk Management, and the Co-Founder and Managing Director of Global Thermostat, a company that captures carbon from air and other sources.

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Leslie E. Christian
 President & CEO
 Portfolio 21 Investments
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Leslie E. Christian is President and CEO of Portfolio 21 Investments where she co-founded the firm's global equity mutual fund, Portfolio 21, as well as its Local Economies Income Fund (LEIF). Portfolio 21 invests in corporations that have recognized the risks and opportunities of ecological limits and incorporated environmental sustainability initiatives into their business strategies. LEIF is a private fund that invests in bonds and other fixed income vehicles that further the local economies of the Pacific Northwest. She has led the formation of Upstream 21, a regional holding company committed to acquiring, supporting, and growing small local businesses that want to sell but not "sell out." Leslie has spoken and written on the subjects of ecological limits and investing as well as the need to reframe modern portfolio theory in view of integrated risk and uncertainty, challenges to economic growth, and diverse investor utility functions.



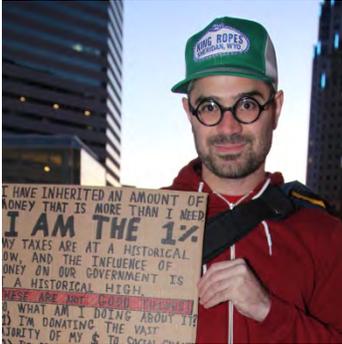
JAMES K. CUMMINGS
 Chair
 Nathan Cummings Foundation
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James K. Cummings has been an activist/philanthropist for more than 40 years, with deep passions for the Environment, Jewish Life, Social Justice, and Family Centered Medicine. James presently chairs the board of The Nathan Cummings Foundation and serves on the International Board of The Abraham Fund Initiatives. In Israel, James serves on the International Council of the New Israel Fund was a founding committee member of both the Green Environment Fund and the Israel Cooperative Program. James serves on the Advisory council for Bainbridge Graduate Institute. He has lectured at California State University Long Beach, the American Jewish University, and recently at NYU. He served 9 years on the board of the Jewish Funders Network and six years with Committee on Family Foundations for the Council on Foundations. James began a banking career in the late 1960's, and in the 70's he worked for the Institute of Noetic Sciences.

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 <p>Ellen Dorsey Executive Director The Wallace Global Fund edorsey@wgf.org</p>	<p>Ellen Dorsey has 25 years experience promoting international human rights, particularly economic and social rights, and advocating for environmental sustainability. Dorsey is the Executive Director of the Wallace Global Fund, a private foundation located in Washington, DC, that focuses on environmental sustainability, corporate accountability, women’s human rights, criminal justice, media reform and civic participation. Dorsey came to the Fund from The Heinz Endowments in Pittsburgh, Pennsylvania, serving as senior program officer for the Environment Program. Dorsey has served on the board of numerous non-profit organizations promoting human rights and sustainable development, including serving as chair of the board of Amnesty International USA.</p> <p>Dorsey has a doctorate in political science from the University of Pittsburgh, was selected as a Fulbright Research Fellow in South Africa, and has served on the faculty of several Universities. She has lectured and written extensively on effective strategies of non-governmental organizations and social movements. Most recently, Dorsey is co-author, with Paul J. Nelson, of <i>New Rights Advocacy: Changing Strategies of Development and Human Rights NGOs</i>, published in 2008 by Georgetown University Press.</p>
<p>Allison Duncan CEO Amplifier Strategies allison@amplifierstrategies.com</p>	<p>Allison Duncan is the founder and CEO of Amplifier Strategies, a consulting and technology firm that specializes in helping foundations and investors increase their social and environmental impact. She is known for her expertise in creating and implementing program strategies, developing public/private financing partnerships, and measuring program performance. She has worked with foundations, businesses, NGOs, and government agencies in more than 20 countries and continues to pursue her mission globally. Allison is currently advising clients on program strategies with funding in excess of \$500 million. Her current investment focus areas include water, community fisheries, natural resource management, social justice, and poverty alleviation in Africa</p>

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Farhad Ebrahimi
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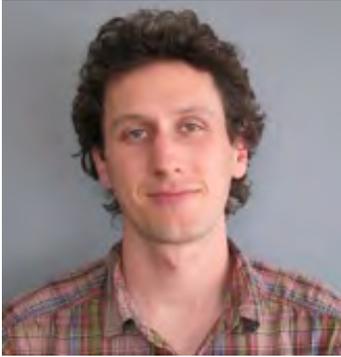
Farhad Ebrahimi is a philanthropist, activist, musician, lover of film and literature, supporter of science, hipster, and bicycle snob who lives in Jamaica Plain, Massachusetts. Farhad comes from a background of unambiguous financial privilege, and he believes that responding to that privilege in an equitable and just manner is going to be a significant part of his life's work. He's especially passionate about issues of climate, energy, and environmental health, which he approaches primarily through his role as the founder and trustee chair of the Chorus Foundation, a domestic funder based in Boston. As a member of the 1% who stands with the 99%, he's also been heavily involved in Occupy Boston since the first tent was pitched in Dewey Square. Farhad graduated from the Massachusetts Institute of Technology in 2002 with a bachelor's degree in Mathematics with Computer Science.



Ellen Friedman
 Executive Director
 The Compton Foundation
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Ellen Friedman currently serves as Executive Director of The Compton Foundation which seeks to foster human and ecological security by addressing contemporary threats to these rights. Ellen also serves on the board of the New Field Foundation that focuses on the creation of a peaceful and equitable world by supporting women and their families to overcome poverty, violence, and injustice in their communities. Previously she served as the executive vice president of Tides where she worked for 23 years. Ellen brings deep experience in organizational design and management, innovative grant program development and implementation, and a passion for transformative social change around the world. She is a trustee of Futures Without Violence, formerly Family Violence Prevention Fund, and the Institute for Jewish Spirituality and holds an MBA from UCLA.

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Michael Gast
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 Resource Generation
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Michael Gast is co-director of Resource Generation (RG). Mike has been involved with Resource Generation since 2002, when he attended his very first RG program, the Making Money Make Change Retreat. Over his many years with RG, Mike has become an experienced social change philanthropist, donor organizer and fundraiser. He co-coordinated the Movement Generation Support Committee, a donor circle supporting young progressive leaders in the Bay Area, and has led multiple young donor delegations to events such as the U.S. Social Forum and multiple Council on Foundations conferences. Over the last 10 years, Mike has organized hundreds of young people with wealth and young trustees of family foundations to move from isolation to action, in support of social change movements. He is a talented facilitator and educator with years of experience leading programs, workshops and trainings on topics from environmental justice to creating a giving plan. Mike lives in Seattle, plays rugby with the Seattle Quake, and is a graduate of Vassar College.



Richard Graves
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Richard Graves is the Family Philanthropy Organizer at Resource Generation and Executive Director of Fired Up Media, where he publishes ItsGettingHotinHere.org. As a NextGen Fellow in Mission Related Investment, Richard supports the emerging impact investment movement, working with university endowments on coal divestment and green revolving funds, and as investor and advisor to sustainable startups. He is a board member of the Institute for Technology and Social Change, SumofUs, and Project Survival Media.

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Denis Hayes
 President & CEO
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Denis Hayes is a seasoned veteran of many legislative, cultural, and courtroom battles over the years, and the author of numerous books and articles, Denis Hayes is probably still best known for having been National Coordinator of the first Earth Day when he was 25. During the Carter years, Denis directed the National Renewable Energy Laboratory; during the Reagan years, he was a professor of engineering and human ecology at Stanford University. A *Time* magazine “Hero of the Planet,” Hayes has received the John Muir Award, the Rachel Carson Medal, and a National Jefferson Award. At the Bullitt Foundation, Denis leads an effort to mold the American Pacific Northwest into a global model of sustainability, applying ecological principles to the design of 'human ecosystems'. To "walk its talk", the foundation is currently constructing the world's greenest office building. (see: www.bullittcenter.org)



Kristin Hull
 President
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Kristin is an activist and educator from Oakland, California. She started her career as an elementary school teacher and then expanded her roles to urban schools researcher, teacher educator, and charter school founder. More recently, Kristin has taken her experience in the civic and non-profit world to her position as President of The Hull Family Foundation, an exciting opportunity to combine her work as an educator and change maker to structuring both grants and investments. Kristin has enjoyed this plunge into the socially responsible investment space, and in the last 2 years, has helped the foundation align its endowment portfolio with their mission, now fully 100% mission invested.

Kristin earned her BA in Latin American Studies and Children's Studies, as well as her teaching credential at Tufts University. She holds a Masters in Bilingual Education Research from Stanford University and doctorate in Urban Education from UC Berkeley. Kristin continues her involvement in the non-profit world by serving on the board of The Mosaic Project, Community Action Fund for Women of Africa, and Pacific Equity Charter. She serves on the advisory committee for the Nicholson Family Foundation and is also active member of the Threshold Foundation and the Democracy Alliance.

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Monica Jain
 Consultant to the David & Lucille
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Monica Jain is the Founder and Executive Director of Manta Consulting Inc. She has worked over the past 15 years to help grow over 200 small businesses and non-profit organizations from the ground up in the US, New Zealand and throughout Latin America and Mexico. Monica has been working since 1993 to build successful for profit and non-profit ventures in the sustainable fisheries and community development arenas. She brings a unique combination of experience from venture capital and commercial banking, grant-making and philanthropy as a Senior Program Officer of the Avina Foundation, and strategic management consulting to leading organization in the non-profit and corporate sectors. Her areas of expertise are fisheries, sustainable seafood, impact investing, community development, and scaling of social and environmental enterprises. Her current work in these fields is oriented towards encouraging investment into sustainable fisheries and land conservation. She is also actively engaged in the creation of IRIS type metrics for land conservation and fisheries. Key clients include the David and Lucille Packard Foundation, the Nature Conservancy, PRI Makers Network, Global Philanthropy Forum, the Monterey Bay Aquarium, and several Fortune 100 companies. Monica holds a B.Sc. from Stanford University (1985) and a MBA in finance and strategic management from the Wharton School (1990). She is fluent in Spanish and French.



Jon Jensen
 Executive Director
 The Park Foundation
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Jon Jensen is Executive Director of the Park Foundation which is based in Ithaca, New York, In this role he serves as the interface between the Foundation's program and investment activities. The Park Foundation has committed to 100% mission related investing, and is active in program related investments, shareholder advocacy and proxy voting.

Jon's previous positions include Associate Director of the Pew Conservation Scholars Program, Senior Program Associate of the Pew Charitable Trusts, and Executive Director of the Wildlife Preservation Trust International. He has a B.S. in Psychobiology from Albright College and a M.S. in Animal Behavior from Bucknell University.

He is currently a founding board member and President of the board of Confluence Philanthropy. His career in philanthropy spans 28 years of grantmaking and includes founding roles in The Funders Network for Smart Growth and Livable Communities, where he also served as chair of the board, and the Environmental Grantmakers Association, where he twice served as chair. He has received career achievement awards from Ohio Citizen Action, the Institute for Conservation Leadership and Ohio Environmental Council.

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Drew Jones
 Co-Director
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Drew Jones is Co-Director of Climate Interactive. He is a system dynamics modeler, facilitator, trainer, and designer of simulation-based learning environments. Trained in Environmental Engineering and System Dynamics modeling through a B.A. at Dartmouth College and a M.S. in Technology and Policy at MIT, he worked in the 1990s at Rocky Mountain Institute and in the 2000s with Dana Meadows at Sustainability Institute. He has focused his practice on helping individuals and teams solve problems by applying system dynamics modeling and systems thinking in the areas of corporate sustainability, diabetes and public health, global climate change, and land use policy. He and his team at CI and MIT Sloan developed “C-ROADS”, the user-friendly climate simulation in use by the U.S. State Department’s Jonathan Pershing, John Holdren in the White House, Senator John Kerry, and analysts for the Chinese Government. He teaches graduate and undergraduate courses in system dynamics, systems thinking, and sustainability at the Kenan-Flagler Business School at the University of North Carolina in Chapel Hill. Drew lives with his family in the mountains of Asheville, North Carolina.



Bruce M. Kahn
 Director and Senior Investment
 Analyst at Deutsche Asset
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Bruce M. Kahn, Ph.D., is Director and Senior Investment Analyst at Deutsche Asset Management, where he advises portfolio managers and product developers on the thematic trends of climate change in both traditional and alternative investments. Previously Bruce was a sustainability consultant with Cameron-Cole, an engineering firm in Boulder, CO. There he worked with Fortune 500 companies on strategies to improve their financial and environmental performance and reporting. Bruce received his doctorate in Environmental Science from the University of Wisconsin-Madison. He was awarded a J. William Fulbright Scholarship and a National Science Foundation Fellowship. A former Peace Corps Volunteer who served in the Republic of Cameroon, Bruce lives in Brooklyn.

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<p>Jennifer Kawar Director, Capital & Strategic Partnership Development Nonprofit Finance Fund</p>	<p>Jennifer Kawar is Director, Capital & Strategic Partnership Development for Nonprofit Finance Fund. She works with funders and CDFI partners on creating comprehensive capital solutions for the social sector, and was previously responsible for lending activity in NFF's Western Region. Before joining NFF in 2009, Jennifer was a consultant to private investor groups and nonblank finance companies, evaluating acquisitions and sourcing capital. She has more than a decade of experience in business development, underwriting, and credit administration with Bank of America, GE Capital and TIAA-CREF. Jennifer received an MBA from the Columbia University Graduate School of Business and is a graduate of the University of California, Berkeley. She co-chairs the Emergency Loan Fund Committee for Northern California Grantmakers and serves on the Housing Advisory Committee for the City of Berkeley, California.</p>
 <p>Michael Lent Founding principal and the Chief Investment Officer Veris Wealth Partners mlent@veriswp.com</p>	<p>Michael Lent is a founding principal and the Chief Investment Officer of Veris Wealth Partners, a wealth management firm specializing in sustainable investing. The firm is dedicated to aligning families' and foundations' financial objectives with their mission and values. For 17 years, Michael has delivered financial planning and investment consulting services to high net worth families, family offices, and foundations. Prior to Veris, he co-founded the New York office of Progressive Asset Management, the first full service national broker/dealer to focus on socially responsible investing. Michael is currently Chair of the Board of Directors of US SIF: The Forum for Sustainable and Responsible Investment, an association for professionals, firms, institutions, and organizations engaged in socially responsible and sustainable investing. He is also Treasurer and a Trustee of the Edward W. Hazen Foundation. Michael is a Certified Investment Management Analyst (CIMA®) and a member of the Investment Management Consultants Association (IMCA®). He graduated from the University of California at Santa Cruz with a B.A. in Biology.</p>

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<p>Paul Leonard Director Center for Responsible Lending paul.leonard@responsiblelending.org</p>	<p>Paul Leonard opened the California office in spring 2006 and directs state policy and outreach efforts. Prior to joining CRL, Paul was a public policy consultant focused on housing and community development, welfare reform, and other anti-poverty issues. Prior to 1999, Paul was a political appointee at the U.S. Department of Housing and Urban Development, serving as Acting Assistant Secretary for Policy Development and Research, as well as Deputy Assistant Secretary for Policy Development from 1994 to 1998.</p>
 <p>Alejandro Litovsky Founder and Director Earth Securities Initiative alejandro@earthsecurity.org</p>	<p>Alejandro Litovsky is the Founder and Director of Earth Security Initiative: involving economic leaders in discussing, rethinking and addressing the risks of reaching the Earth's ecological limits; Board Member of LEAD International; Previously Director of Research at a sustainability consultancy in London, where he created the <i>Biosphere Economy</i>, a project to scale up ideas for a new economy globally. As senior advisor at the think tank AccountAbility, he worked with business leaders to address energy security in Russia, public sector corruption in Indonesia and resource management challenges in Brazil. Strategy advisor to World Bank, Swiss Agency for Development Cooperation, Shell Foundation and Nelson Mandela Foundation in South Africa. Awarded the Hobhouse Memorial Prize by the London School of Economics in 2004 where he obtained a Master in Political Sociology. During this period worked for Shell International's Future Scenarios team in London. Prior to this he was an investment manager with the AVINA Foundation in Buenos Aires.</p>

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Ali Long
 President & Trustee
 The Springcreek Foundation
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Ali Long is President & Trustee of The Springcreek Foundation (TSF) in Marin County, California. TSF aspires to strengthen our community through individual and collaborative grants and investments; collaborative investments foster the transition to a conservation economy, with a focus on sustainable food systems. Ali has been committed professionally and personally to Philanthropy Promotion & Education since 1996. Through her leadership, Ali has engaged the founding family (now in its seventh generation) and donors with Mission Related Investments (MRI) and Program Related Investments (PRI), and has developed programming to promote the burgeoning industry of Impact Investing, both financial first and impact first. With her knowledge of philanthropic tools, trends and strategies, Ali dedicates her time to catalyzing new grantmakers and supporting existing ones.



Sonal Mahida
 Confluence Philanthropy
 Technical Consultant
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Sonal Mahida's background in responsible investing ranges from implementing responsible investing practices at institutional investors, to leading the US activities of a major global shareholder engagement initiative. Most recently, Sonal was the Vice President of the Carbon Disclosure Project (CDP), where she oversaw the organization's operations in the United States. Before joining CDP, Sonal was a Senior Governance Analyst at TIAA-CREF, where she helped develop the firm's social and environmental proxy voting guidelines, led shareholder engagements on ESG issues with portfolio companies, and was responsible for proxy voting on these issues. She holds an M.B.A. in finance from Boston University's School of Management and a B.A. from Barnard College. During her career, Sonal has been a frequent speaker on responsible investing topics at leading events from investor roundtables to business conferences. Sonal is leading the 2011 Shareholder Services Program by working with program participants and designing a strategic plan for the program.

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 <p>Jan Masaoka Director and Editor in Chief Blue Avocado jan@blueavocado.org</p>	<p>Jan Masaoka is a national nonprofit leading thinker and writer; she starts this month as CEO of the California Association of Nonprofits. She publishes Blue Avocado, an online magazine for nonprofits with ultra-practical, fun, and controversial articles (subscribe free by emailing editor@blueavocado.org). She is former executive director of CompassPoint Nonprofit Services, a nonprofit consulting and training firm. She is an eight-time designee as one of the "Fifty Most Influential People in the Nonprofit Sector" nationwide. Her two latest books are <i>Nonprofit Sustainability</i> (with Jeanne Bell and Steve Zimmerman, Jossey Bass) and <i>The Nonprofit's Guide to HR</i> (Nolo Press).</p>
<p>Ian Meyer Director T&J Meyer Family Foundation ian@tjmff.org</p>	<p>Ian Meyer is a Director of T&J Meyer Family Foundation, a private family foundation headquartered in London, dedicated to alleviating human suffering through effective and sustainable giving focusing on health, education and environment. The Foundation works to leverage their assets to create scalable impact and sustainable solutions to global poverty. Ian was Executive Director of the Foundation for three years in London, and before that, a Consultant Investment Specialist at a San Francisco asset management group, RCM. Ian graduated from University of San Francisco in International Business, and is a graduate of Institute of Philanthropy's The Philanthropy Workshop. Ian is a participating member of MRI Fellowship program hosted by Resource Generation and Confluence for Philanthropy.</p>

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Craig Muska
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Craig Muska is responsible for recommending, implementing and monitoring investment strategy for Threshold's private family foundation clients. Craig also manages the development and implementation of Threshold's mission-related investment service offering and leads the firm's efforts to align foundation investment strategies with their program initiatives.

With more than 15 years of experience in investment services, Craig joined Threshold after serving as managing director at IW Financial, a Portland, Oregon-based investment research and consulting firm where he worked with institutional investors and asset managers to implement values-based investment strategies. Previously, he established a global wealth management platform at Envestnet Asset Management, and researched international equities, merger and acquisition opportunities and other asset classes as part of the investment team at both Credit Suisse HOLT and Nuveen Investments.

Craig earned a BA in finance from Northern Illinois University and a MS in public administration from the University of Illinois, Chicago. Craig currently serves on the advisory committee for Impact Capital, a Seattle-based community development organization.



William H. Page
 Senior Vice President, Portfolio
 Manager
 Essex Investment Management, LLC
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Bill Page is a Portfolio Manager on the Essex Global Environmental Opportunities Strategy (GEOS). Prior to joining Essex in 2009, he spent eleven years at State Street Global Advisors (SSgA), most recently as Lead Portfolio Manager for GEOS and Head of the Environmental, Social and Governance (ESG) investment team. Bill developed GEOS over a four-year period at SSgA, and was a member of the Global Fundamental Strategies group. Prior to SSgA, he worked in product management for Wellington Management Company, LLC. Bill is on the Advisory Board of the Journal of Environmental Investment, a peer-reviewed, open-access journal that publishes original research at the intersection of the environment and investing. During business school, Bill worked on socially responsible investment research at KLD Research & Analytics. He earned a Bachelors degree in Economics from Boston University and an MBA from the F.W. Olin School of Business at Babson College.

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Judy Patrick
CEO

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Judy Patrick is President and CEO of the Women's Foundation of California. Prior to her appointment in 2008, Judy held the post of Executive VP of Programs for 9 years. In that role, Judy led the Foundation's advocacy and policy change work, including the development of the groundbreaking Women's Policy Institute. She also worked to develop programs to strengthen grant partners' organizational capacity and to evaluate the impact of their work. Prior to coming to the Foundation, Judy directed the work of several nonprofits. She was executive director of the San Francisco-based Women's Philharmonic and director of Girls Count, a Colorado initiative to change systems that impact girls' educational achievement and career planning. She also led Mi Casa Resource Center for Women, a Denver organization that advances self-sufficiency primarily for low-income Latinas and youth. She has served on the faculty of the University of Colorado at Denver and Regis University, where she taught program development and evaluation. Judy has worked as a researcher and program evaluator in both the public and private sectors. She serves on numerous boards of directors.



Shaun Paul
Founding Director
EcoLogic Development Fund
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Shaun Paul is the Founding Director of *EcoLogic Development Fund*, which he co-founded in 1993 to protect and restore nature in areas of high biodiversity by teaming with poor communities in developing countries. *EcoLogic* has provided assistance benefiting over 500 poor and indigenous communities in Latin America, and the protection of 5 million acres of threatened habitats. From 1999 to 2006, he guided the incubation of an international loan fund, *Root Capital*, which has provided \$256M to small and growing businesses in Latin America and Africa. In 2006 he formed *Pico Bonito Forests* in Honduras with impact investors to commercially plant tropical hardwood trees and create carbon credits with rural communities where he serves as the board Co-President. Mr. Paul has been named a Next Generation Leadership Fellow by the Rockefeller Foundation. Currently, he is working with impact investors to establish new approaches to leverage social and capital markets at the nexus of conservation, human well-being and culture.

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Susan Phinney Silver
 PRI Officer
 David & Lucile Packard Foundation
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Susan Phinney Silver joined the Foundation in the fall of 2008 as its first Program-Related Investment (PRI) Officer. She manages the Foundation's PRI portfolio, which includes investments in every program area and is currently valued at about \$120 million. Before joining Packard, Susan consulted with other foundations on their PRI initiatives, including the California Community Foundation and the MacArthur Foundation. Prior to that, she worked for 13 years at The Development Fund in San Francisco, where she led the creation of several innovative community financing initiatives around the country, that were able to generate over \$600 million from banks and other private investors for affordable housing, community economic development, and environmental clean-up. Earlier in her career, Susan was an overseas auditor for Catholic Relief Services, primarily in Africa, and as a consultant with McKinsey in New York. She has degrees from Princeton University and Yale School of Management. Susan enjoys exploring nature with her family, including hiking, camping, and kayaking.



Raul Pomares
 Senior Managing Director
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Raúl Pomares is a Senior Managing Director of Sonen Capital, where he leads the firm's overall investment and business activities. Prior to forming Sonen Capital, Raúl served as Managing Director of Springcreek Advisors, where he led the firm's portfolio strategy. Earlier in his career, he worked as a Portfolio Manager at Guggenheim Investment Advisors, co-founded a boutique wealth management firm, and served as an investment advisor, international private banker and consultant on behalf of global financial institutions and private investors. Raúl is the co-author of *Solutions for Impact Investors: From Strategy to Implementation*; as well as a supporting author to *Promoting Sustainable Food Systems through Impact Investing*. Raúl serves as a Mentor for the Global Social Benefit Incubator (GSBI™). Additionally, he is an advisor to the Global Impact Investing Network (GIIN) Impact Base and to EKO Asset Management Partners. He received his B.S. in International Business Management from the University of San Francisco.

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Mark Reed
 Founder
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Mark Reed is Contact Fund's founder and manager. Contact Fund, founded in 2005, is a private community investment fund dedicated to deploying mission-driven capital into innovative community development strategies in New York City neighborhoods. Mark also serves as a non-operating Principal at Alembic Community Development and an angel investor in Corbin Hill Road Farm. Mark is a former VP of Portfolio Management at the Bank of New York. While there he co-managed a \$500 million bond portfolio and a \$300 million credit derivative portfolio. He also performed corporate credit default modeling, and analyzed structured credit products and fundamental corporate credit. Since 1997, Mark has served on the Board of Directors of Simpson Investment Company and currently serves as Chair of the Board of the Rudolf Steiner School in Manhattan. Prior to moving to New York, Mark managed an after-school program for public housing residents in San Francisco's Mission District and managed a youth community center. He holds a BA in Anthropology from Stanford University and an MBA in Finance from the Stern School of Management at NYU.



Lisa Renstrom
 Director
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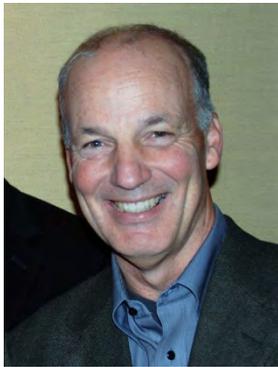
Lisa Renstrom: A Nebraska upbringing gave me a love of the land and "real" conservative but green values. None-the less while running a family hotel business in Mexico, my decisions were defined by the bottom line and I couldn't find a triple bottom line. Fast forward to Charlotte North Carolina. I served as local group chair and then as national President of the [Sierra Club](#) from 2005 to 2007. Place based in DC, as President of Rachel's Network, I led the strategic planning to position the Network for a new decade. I am currently seeking to own what I own, assist the Occupy Movement and serve on the boards of ecoAmerica and Earth Justice, Interfaith Power & Light. Oh yes, undergrad Finance Degree from the University of Nebraska at Omaha, OPM at HBS and MPP at the Kennedy School.

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Lisa Richter is co-founder and principal of GPS Capital Partners, a national consultancy that assists foundations and other institutions to execute impact investing strategy, including foundation program- and mission-related investing (PRI and MRI). Her work spans asset classes, return expectations and issue areas, frequently incorporating place-based and sector focus to increase equitable access to opportunities, including health, healthy and sustainable community development and education. GPS is collaborates with The Philanthropic Initiative, PRI Makers Network, More for Mission and others to expand impact investing services for community, health and place-based foundations. With Lucy Bernholz, she co-authored Equity Advancing Equity, a guide to impact investing to advance racial and social equity agendas that is part of the On the Brink of New Promise Series at <http://www.communityphilanthropy.org>. Recently, she authored the Grantmakers In Health Guide to Impact Investing at http://www.gih.org/usr_doc/GIH_Guide_to_Impact_Investing_FIN_AL_May_2011.pdf. Lisa holds a BA and an MBA from the University of Chicago.



Tom Sargent
Board President
New Field Foundation
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Tom Sargent spent the last 30 years working on innovative community-oriented projects that bring to life underutilized urban areas. As a founding principal of Equity Community Builders LLC (ECB) in 1993, he led the development and ongoing management of such award winning projects as the Thoreau Center for Sustainability in the Presidio and Cavallo Point Lodge. The firm is committed to responsible development, and focuses on historic rehabilitation, non-profit multi-tenant centers (David Brower Center and Ed Roberts Campus), affordable housing and green building practices. Tom also participates actively in the non-profit sector. Tom is currently co-founder and President of the the New Field Foundation, which supports rural African women and their families to overcome poverty, violence and injustice in their communities; a founding board member of Kalliopeia Foundation; a co-manager/advisor of several community loan and social investment funds, and serves on numerous boards.

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Mark F. Schegel
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Mark F. Schegel, CFA is co-founder and VP of Business Development at Moxy Vote LLC. His background includes entrepreneurial experience in both the financial services and technology fields with several start-up ventures as well as experience at larger more established firms. Combining a unique blend of analytical and marketing skills with various leadership roles, for the past 18 years Mark has helped businesses target new markets, identify potential business and develop strategic relationships. In 2009, Mark helped launch Moxy Vote, a venture that is pioneering a new path to give shareholders a voice once again in the boardrooms of the public companies they own. Moxy Vote's mission is to increase participation by shareholders in the corporate governance process and force companies to improve both their business and management practices. Mark graduated from University of Richmond with a BS Degree in Business Administration (*Magna Cum Laude*) and has attained the designation of Chartered Financial Analyst. He has been quoted in publications including *The Wall Street Journal*, *Philadelphia Inquirer* and *Securities Industry News* among others.



Jon Scott
 President
 Singing Field Foundation
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Jon Scott is a 1982 graduate of Williams College, degree in Geology & Environmental Studies. Employed with Clean Water Action & Clean Water Fund since 1983. Serve on the board of Earth Share and on the grassroots grantmaking committee for the New England Grassroots Environmental Fund. Career has emphasized grassroots organizing/campaigning, fundraising, communications.



Morgan Simon
 Co-founder & CEO
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Morgan Simon is a serial social entrepreneur with particular expertise in impact investment and international development. She is the co-founder and CEO of Toniic, a global network of early-stage social investors. Toniic members share deal flow, due diligence and monitoring on global investments in this action-oriented community looking to move \$100 million into global social enterprise. She is also the co-founder of Innovacion Investments, Texas's first community development venture capital fund. In all her work, she emphasizes community empowerment, leadership and ownership. As the founding executive director of the Responsible Endowments Coalition, Morgan brought together 100

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	<p>colleges and universities from across the country, helping to move their \$200 billion in endowment dollars towards impact investment. Morgan has also worked with grassroots organizations and the United Nations Development Program (UNDP) in Mexico, Honduras and Sierra Leone, and in domestic microfinance with Women's Initiative for Self Employment.</p> <p>She has served on the boards of the Social Venture Network, the SJF Institute (affiliated with SJF Ventures), is on the board of La Base and is an advisor to Agora Partnerships, Nexii and Grupo Yansa. Her work has been featured in The Wall Street Journal, Washington Post, and other media. She received a B.A with High Honors in Economics and Political Science from Swarthmore College.</p>
 <p>Paul Solli Partner Aperiod Group LLC psolli@aperiogroup.com</p>	<p>Paul Solli is co-founder and partner with Aperio Group LLC, a quantitative money-management firm in Sausalito, California. Paul began his career as a CPA with Peat, Marwick, Mitchell & Company in Boston and also worked in strategy consulting for Bain & Company. Prior to Aperio Group, Paul was Vice President of Salomon Brothers Investment Strategies group, responsible for structuring portfolios and advising pension funds and investment companies. Paul received his MBA from the Tuck School at Dartmouth College.</p>
 <p>Mark J. Spalding President The Ocean Foundation mspalding@oceanfdn.org</p>	<p>Mark J. Spalding is the President of The Ocean Foundation and is an authority on international ocean policy and law. He is the former Director of the Environmental Law and Civil Society Program, and Editor of the Journal of Environment and Development, at the Graduate School of International Relations & Pacific Studies (IR/PS), UC-San Diego. Spalding has also taught at Scripps Institution of Oceanography, UCSD's Muir College, UC Berkeley's Goldman School of Public Policy, and University of San Diego's School of Law. He was a research fellow at UCSD's Center for U.S.-Mexican Studies, a Sustainability Institute – Donella Meadows Leadership Fellow and a SeaWeb Senior Fellow. He is chair emeritus of the National Board of Directors of the Surfrider Foundation, and was the chair of the environmental law section of the California State Bar Association. He holds a B.A. in history with Honors from Claremont McKenna College, a J.D. from Loyola Law School, and a Master in Pacific International Affairs from IR/PS.</p>

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Anne Stetson
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Anne Stetson is a co-founder and managing director of Sonen Capital LLC, an impact investment firm providing advisory services and investment products that seek to generate both investment return and social and environmental impact. Anne is also a Fellow and Visiting Scientist at the Harvard FXB Center for Health and Human Rights at the School of Public Health, where she teaches on social entrepreneurship in global health. For the first decade of her career, Anne practiced international corporate and emerging markets investment law on Wall Street and in Boston with Fidelity Investments and Grantham, Mayo, van Otterloo. Anne serves as a director of ACCION International, the John Merck Fund, and the Lookout Foundation. She is a member of the Council on Foreign Relations. She has published articles and books in the areas of impact investing, emerging markets investing and human rights. She holds a B.A. in English literature from Yale University, a Master's in International Affairs from Columbia University's School of International and Public Affairs, and a J.D. from Boston University.; she also studied at Columbia Law School. Anne resides in Cambridge, MA with her family.



Sonja Swift
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Sonja Swift is an organizer and messenger in philanthropy / mission investing. She has field related experience globally around issues ranging from extractive industries to agro-ecology and Indigenous land rights. She serves as trustee for Swift Foundation, is on the advisory board of Confluence Philanthropy, assisting with their New Mexico Native Green Loan Fund, and is also co-chair of the Next Gen Fellowship on Mission Related Investing. She recently joined the board of International Funders for Indigenous Peoples. Sonja has a BA in Cultural Ecology from the University of California Santa Cruz and is now beginning a masters program in place-based studies at Goddard College.



Jerome Tagger
Chief Operating Officer
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Jerome Tagger has 10 years experience in responsible and sustainable investment. He joined Confluence Philanthropy as COO in January 2011. Prior experience include acting as the Chief Operating Officer at the UN-backed Principles for Responsible Investment, Head of Research at Eurosif, the European Sustainable Investment Forum and as independent consultant. Jerome is a globally recognised professional in this space with strategic and management experience, both in the for profit and non profit sector. Jerome is a graduate of ESSEC Graduate School of Business, France.

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Andrew 'Drew' Tulchin
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Andrew 'Drew' Tulchin, Managing Partner of Social Enterprise Associates, a registered 'B Corporation', brings fifteen years experience building lasting initiatives. His efforts in social, environmental and community investing mobilized more than \$100 million for 'triple bottom line' returns. Consulting has taken him throughout the U.S. and to nearly 40 countries worldwide, from (A)fghanistan to (Z)ambia. Current engagements include: the Confluence initiative SW Native Green Loan Fund, Future of Fish and Emvolution (a medical supply start-up). Previously, he directed a U.S. microfinance institution. As a Program Officer at Grameen Foundation, he started the Capital Markets Group. Publications include Researcher for the book Compelling Returns. His co-written plan for Prisma Microfinance was a Global Social Venture Competition award winner in social impact. Drew completed his MBA at University of Washington; his BA from Washington University. He enjoys ultimate frisbee and eating foods he doesn't recognize. He lives in Santa Fe, NM.



Philip Varnum
 Chief Financial & Admin. Officer
 The Lemelson Foundation
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Philip Varnum joined the Lemelson Foundation in June 2007. Prior to joining Lemelson, he was with Portland State University Foundation for nearly ten years where he was responsible for accounting, investment, human resources, real estate and entrepreneurial functions. Philip earned an MBA degree from Loyola Marymount University in Los Angeles.



Matthew Weatherley-White

Matthew Weatherley-White is an emerging impact thought leader, specifically as it relates to portfolio integration and "capacity building" investments. He has presented and participated in panel discussions at leading conferences, including SALT, SoCap, Play Big, Take Action! and SRI in the Rockies. Most recently, he was a contributor to "A New Foundation for Portfolio Management", published by RSF Social Finance and Portfolio 21 which challenges conventional assumptions around risk, growth and capital utility, and suggests a radical new approach to Modern Portfolio Theory. Matthew is a founding partner at The CAPROCK Group – a global family wealth management firm with offices in Seattle, Silicon Valley and Boise, and led his firm's successful effort to become a founding B Corp in 2007. Matthew

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<p>Partner The CAPROCK Group matthew@thecaprockgroup.com</p>	<p>received a double-major degree from Dartmouth College, graduating “With Distinction”. He currently serves as a Chairman for the Lee Pesky Learning Center, an organization he joined as a founding board member in 1997, and has won multiple national and world championships in a variety of endurance sport</p>
 <p>Georgette F. Wong CEO Take Action! georgette@correlationconsulting.com</p>	<p>Georgette Wong is the Creator and Curator of the Take Action! Impact Investing Conference Series and CEO of Correlation Consulting. Now in its 6th year, Take Action! is the premier gathering of impact investors focused on premium returns. Georgette most recently performed an institutional asset owner study, in collaboration with the US Department of State and the United Nations-backed Principles for Responsible Investment. Georgette has assisted the US State Department, The Board of Governors of the Federal Reserve and the Federal Reserve Bank of San Francisco’s Center for Community Development Investments on efforts to catalyze impact investing across the government, private and public sectors. Georgette’s most recent work has been published in Community Development Investment Review, produced by the Federal Reserve Bank of San Francisco, <u>Solutions for Impact Investors: From Strategy to Implementation</u>, produced by Rockefeller Philanthropy Advisors, and Financial Planning Magazine.</p>
 <p>Ricard Woo CEO The Russell Family Foundation richard@trff.org</p>	<p>Richard Woo is the CEO of The Russell Family Foundation (TRFF) in Gig Harbor, Washington. TRFF supports grassroots leadership, environmental sustainability, and global peace. George and Jane Russell founded TRFF upon the sale of Russell Investments. Richard joined the Foundation in 2000 as the first executive director outside of the Russell Family. TRFF envisions a “sustainable and peaceful world for people, places and communities.” Richard serves on the board of directors of Philanthropy Northwest—a six state regional association of foundations. His past board service has included: the Council on Foundations, Asian Americans & Pacific Islanders in Philanthropy; and Northern California Grantmakers. Before TRFF, Richard worked at Levi Strauss & Co. on community relations, corporate social responsibility (CSR) and philanthropy. In his last three years at the company, he served as executive director of the Levi Strauss Foundation with responsibilities for annual grantmaking of \$20 million in 40 countries.</p>