

# Everyone Should Get it — ESG

## *Activating Your Whole Portfolio*

### AGENDA

#### Tuesday, November 12

8:00 AM – 9:00 AM

**Registration & Networking**

*Breakfast will be served in Lighthouse 2*

9:00 AM – 9:10 AM

**Welcome: Why You Should Get It!**

*All sessions will be held in Lighthouse 1*

Matt Fleissig, President, Pathstone

9:10 AM – 9:30 AM

**Opening Remarks: Where Have We Been and Where are We Headed  
ESG and Impact 1.0, 2.0, 3.0**

Ron Cordes, Cordes Foundation

9:30 AM – 10:45 AM

**Applying a More Powerful Lens to Publicly-Traded Securities:  
Understanding Outcomes for the Better**

**Moderator:**

Donna Szeto, Director of Research, Pathstone

**Panelists:**

Peter Coffin, President & Portfolio Manager, Breckinridge Capital Advisors

Geeta Aiyer, President and Founder, Boston Common Asset Management

Gwen Le Berre, Director of Responsible Investing, Parametric

10:45 AM – 11:00 AM

**Break**

11:00 AM – 11:45 AM

**Fireside Chat with Tesla Board Member, Ira Ehrenpreis: Green Should  
Be Everyone's Favorite Color**

Jeff Scheer, Managing Director, Pathstone

Ira Ehrenpreis, Tesla Board Member, Founder and Managing Partner of  
DBL Partners

11:45 PM – 12:45 PM

**Lunch & App-Based Exercise: Do You Get It?**

*Buffet lunch will be served in Lighthouse 2*

12:45 PM – 1:15 PM

**Why We Care: Pathstone's Multi-Generational Approach**

Mark Peters, Managing Director, Pathstone

1:15 PM – 2:30 PM

**Impact Magnified in Philanthropy and Investments — Grants, Investments and the Gray Zone In-Between**

**Moderator:**

Mark Peters, Managing Director, Pathstone

**Panelists:**

Jenny Russell, Merck Family Fund

Karen Ansara, New England International Donors (NEID)

Joan FitzGerald, Individual Investor

Leroy Johnson, Southern Partners Fund

2:30 PM – 3:00 PM

**Keynote Speaker: What One Person Who Cares Can Do!**

Twesigye Jackson Kaguri, Founder of the Nyaka AIDS Orphans Project and Author of *A School for My Village*

3:00 PM – 3:15 PM

**Break**

3:15 PM – 4:30 PM

**Applying a More Powerful Lens within Private Equity, Private Credit and Hedge Funds: Aligning Interests with Outcomes**

**Moderator:**

Alex Hart, Managing Director of Research, Pathstone

**Panelists:**

Scott Brown, CEO and Managing Partner, New Energy Capital

Sasha Novograd Brown, Partner, Ecosystem Integrity Fund

Tim Albright, Portfolio Manager, Summit Partners

4:30 PM – 4:45 PM

**Break**



**4:45 PM – 5:30 PM**

**Back to the Future: Family Dynamics, Succession & Legacy Planning**

This session will be an introduction to the FuturePath initiative through an interactive discussion among multi-generational family members.

**5:30 PM – 5:45 PM**

**Closing Remarks: Building the Bridge from Today to Tomorrow**

Steve Braverman, Co-CEO, Pathstone

**6:00 PM – 7:30 PM**

**Cocktails & Conversation**

*Reception will be held in Lighthouse 2*

*Please note the program below is subject to change.*

*Pathstone would like to thank our speakers and sponsors who contributed to this program.*

**DBL**  
**Breckinridge**  
**Boston Common**  
**EIF (Ecosystem Integrity Fund)**

**New Energy**  
**Summit**  
**Parametric**