

2016 COIN INVESTMENT SUMMIT

August 17, 2016
The California Endowment - Los Angeles

Celebrating 20 Years
of insurers making
impact investments for
a better California.

8:30 – 9:00 am	Summit Registration and Breakfast
9:00 – 9:15 am	Opening Remarks - 20 Year Legacy of COIN Stacie Olivares-Castain, Managing Director, COIN
9:15 – 10:15 am	PANEL A – IMPACT INVESTING AND THE INSURANCE INDUSTRY Moderator: Tony Tomich, Head of Pension Investments, Farmers Group, Inc. & COIN Advisory Board Member Lincoln Walworth, Director of Investments, CSAA Insurance Group Luke Apicella, Associate, Prudential Megan Fielding, Director of Business Strategy, TIAA Global Asset Management Steven Henry, Director of Treasury Investment Management, UnitedHealth Group
10:15 – 10:30 am	Break
10:30 – 11:30 am	PANEL B – IMPACT INVESTMENTS RISK AND RETURN Moderator: Ed Toy, Director of the Capital Markets Bureau, NAIC Karen Seabury, Director of Ratings, Aeris Matt Glattig, Director of Business Unit Finance, Capital Impact Partners Mikiyon Alexander, Senior Director, S&P Global Ratings Nicolo Pinoli, Partner, Novogradac & Company
11:30 – 12:15 pm	PANEL C – COIN IMPACT Moderator: Tom Woelfel, Director of Insight, Pacific Community Ventures Jason Howard, Director, GCM Grosvenor Matt Sheedy, Director, Social Investment, MetLife Robin Hyerstay, VP of Capital Markets, Enterprise Community Investment Inc. Violet Osterberg, Managing Director, Pacific Life Insurance Company
12:15 – 12:30 pm	Commissioner Dave Jones – Awards Presentation
12:30 – 1:00 pm	Lunch
1:00 – 1:30 pm	Elizabeth Laderman, Federal Reserve Bank of San Francisco – Economic Overview & Outlook
1:30 – 2:30 pm	PANEL D – THE FUTURE OF IMPACT INVESTING Moderator: Michelle Holleran, Senior PRI Analyst, The California Endowment Amit Bouri, CEO, The Global Impact Investing Network (GIIN) Bhairvee Shavdia, Impact Associate, HCAP Partners Danielle Howard, Vice President, Goldman Sachs Jessica Huang, Vice President, BlackRock
2:30 – 2:45 pm	Break
2:45 – 3:45 pm	PANEL E – GREEN INVESTMENTS Moderator: Jay Powell, COIN Advisory Board Member, COIN Alex Bernhardt, Head of Responsible Investments, US, Mercer Kurt Forsgren, Managing Director, S&P Global Ratings Cynthia McHale, Director of Ceres Insurance Program, CERES
3:45 – 4:00 pm	Closing Remarks: Stacie Olivares-Castain, Managing Director, COIN Dave Jones, Commissioner, California Department of Insurance
4:00 – 5:00 pm	Reception

AGENDA*



* Agenda subject to change

CALIFORNIA ORGANIZED
INVESTMENT NETWORK
Insurers investing in a better California