



CALIFORNIA ORGANIZED
INVESTMENT NETWORK
Insurers investing in a better California

2nd ANNUAL COIN INVESTMENT SUMMIT

July 16, 2015

Holiday Inn Sacramento - Capitol Plaza

AGENDA*

9:30 – 10:00 a.m.	Registration
10:00 – 10:15 a.m.	Welcome Stacie Olivares-Castain, Managing Director, <i>COIN</i> Dave Jones, California Insurance Commissioner Darrell Teat, Chair, <i>COIN Advisory Board</i>
10:15 – 11:15 a.m.	Panel A – Case Study on COIN Tax Credit Investments Moderator: Michael Novogradac, Partner, <i>Novogradac</i> Diane Giampaoli, Tax Executive, <i>CSAA Insurance Group</i> Robin Hyerstay, Vice President, <i>Enterprise Community Investment, Inc.</i> Michael Hickey, Government Relations Counsel, <i>MetLife</i> C. Lea Salem, Director of Finance, <i>Northern California Community Loan Fund</i>
11:15 – 11:25 a.m.	Break
11:25 – 12:25 p.m.	Panel B – Insurer Evaluation of COIN Investments Moderator: Tomoko Stock, Bureau Chief, <i>California Department of Insurance</i> Ed Toy, Director, <i>NAIC Capital Markets Bureau</i> Kevin Zwick, President, <i>Housing Trust Silicon Valley</i> Douglas Bystry, President, <i>Clearinghouse CDFI</i> Mikiyon Alexander, Senior Director, Public Finance Ratings, <i>Standard & Poor's</i> Scott Syphax, Chairman, <i>The Nehemiah Companies</i>
12:25 – 12:45 p.m.	Award Presentation - Dave Jones, California Insurance Commissioner
12:45 – 1:45 p.m.	Lunch and Presentations on the Performance of Impact Investments Moderator: Tina Castro, Chief Executive Officer, <i>Avivar Capital</i> Mina Pacheco Nazemi, Partner, <i>GCM Grosvenor</i> Daniel Brett, Manager, InSight, <i>Pacific Community Ventures</i>
1:45 – 2:45 p.m.	Panel C – Partnering Insurer Investors and Investment Opportunities Moderator: Daniel Brett, Manager, InSight, <i>Pacific Community Ventures</i> Monika Mantilla, Managing Partner, <i>Small Business Community Capital</i> John Kinghorn, Corporate Social Responsibility, <i>Prudential</i> Jun Sakumoto, Partner, <i>Avanath Affordable Housing</i> Stephen Lee, Senior Associate, RI-Impact Investing, <i>TIAA-CREF/Financial Services</i>
2:45 – 2:55 p.m.	Break
2:55 – 3:05 p.m.	Closing Remarks - Dave Jones, California Insurance Commissioner Doug Bystry, Vice-Chair, <i>COIN Advisory Board</i> Stacie Olivares-Castain, Managing Director, <i>COIN</i>
3:05 – 4:45 p.m.	Matchmaking Event

* Agenda subject to change