



Capital Link's Annual CSR Forum

"CSR & IR - MAXIMIZING SHAREHOLDER VALUE"

CSR as a competitive advantage in finance & investing

March 13, 2013 - The Metropolitan Club, New York City



IN COOPERATION WITH



12:00 PM – 12:30 PM	REGISTRATION
12:25 PM – 12:30 PM	Introductory Remarks & Industry Overview Nicolas Bornozis, President - Capital Link, Inc.
12:30 PM – 1:05 PM	<p>"VALUING COMPANIES BEYOND FINANCIAL METRICS - CSR, Finance & Capital Markets" <i>Does CSR enable companies to have easier access to the capital & financial markets & lower cost of capital?</i></p> <p><i>Moderator: Eric J. Hespeneide, Global Leader, Deloitte Sustainability Audit & Enterprise Risk Services - Deloitte & Touche LLP</i></p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Erika Karp, Managing Director, Head of Global Sector Research - UBS Investment Bank • Marc Fox, Director, Investor Initiatives - The Carbon Disclosure Project • Bruce Kahn, Sustainability Management Program - Columbia University
1:10 PM – 1:55 PM	<p>"CSR & SHAREHOLDER VALUE: OPTIMIZING VALUATION & RETURNS" <i>Does CSR increase shareholder value & will the momentum for voluntary disclosure satisfy all stakeholders and really change the game?</i></p> <p><i>Moderator: Joe Sibilio, Chief Executive Office - CSRwire</i></p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Adam Kanzer, Managing Director & General Counsel - Domini Social Investments; VP & Chief Legal Officer - The Domini Funds • Kevin Anton, Chief Sustainability Officer – Alcoa, Inc. • Michael Jacobson, Director, Corporate Responsibility Office - Intel Corporation • Al Iannuzzi, Sr. Director, Product Stewardship, WW Environment, Health & Safety - Johnson & Johnson • Paula Luff, VP Corporate Social Responsibility - Hess Corporation
2:00 PM – 2:40 PM	<p>"CSR, ALIGNING STRATEGY & COMMUNICATIONS" <i>Integrating CSR & IR, making sure all departments are communicating the same message internally and externally.</i></p> <p><i>Moderator: Michelle Greene, SVP & Head of Corporate Responsibility - NYSE Euronext</i></p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Dave Stangis, VP Public Affairs & Corporate Responsibility - Campbell Soup Company • Curtis Ravenel, Global Head, Sustainability Group - Bloomberg • Beth Shiroishi, VP, Sustainability & Philanthropy - AT&T • Maggie Kohn, Director, Global Corporate Responsibility – Merck & Co., Inc. • Jacqueline Strayer, VP, Corporate Communication - Johnson Controls, Inc.

2:40 PM - 3:10 PM	COFFEE BREAK
3:15 PM – 3:50 PM	<p>” INTEGRATED REPORTING AND UPDATES ON REPORTING SOLUTIONS, RATINGS STANDARD & GUIDELINES”</p> <p><i>The growing uptake of the GRI’s Sustainability Reporting Framework – and its latest edition: the G4. Latest trends in corporate disclosure and sustainability reporting. How to navigate the numerous assessment models, ratings, rankings and analyst queries/analysis. What matters most to investors in terms of ratings, rankings, scores and opinions? Panelists will help you understand how different standards, initiatives and frameworks contribute to mainstream and SRI/responsible investment analysis and decision-making.</i></p> <p>Moderator: Hank Boerner, Chairman - Governance & Accountability Institute, Inc. (G&A)</p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Marjella Alma, Manager External Relations - Global Reporting Initiative USA (GRI) • Stathis Gould, Head of Professional Accountants in Business - IFAC • Janice Warren, President - OneReport • Mark Tulay, Program Manager - GISR
3:55 PM – 4:30 PM	<p>“CSR & INVESTING-THE INVESTOR’S POINT OF VIEW-WHAT MATTERS?”</p> <p><i>Do investors include CSR in their criteria?</i></p> <p>Moderator: Dan Hanson, Managing Director & Portfolio Manager - BlackRock</p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Jan C. Childress, Director, Investor Relations - Consolidated Edison, Inc. • Gary Buesser, Director - Lazard Asset Management, LLC • Elizabeth Seeger, Principal - Kohlberg Kravis Roberts (KKR) • Joseph M. Kinard, Investment Committee Member, Board of Pensions - Presbyterian Church USA Pension Fund • Catherine E. LaMarr, General Counsel - Office of the Connecticut Treasurer
4:35 PM – 5:10 PM	<p>“SUSTAINABLE INVESTING & CREATED SHARED VALUE”</p> <p><i>The role & significance of SRI/impact investing; how to construct SRI portfolios; SRI Indices; comparative performance for SRI Portfolios.</i></p> <p>Moderator: Paul Hilton, Portfolio Manager & Director of Business Development - Trillium Asset Management, LLC</p> <p><i>Panelists:</i></p> <ul style="list-style-type: none"> • Orin Kramer, General Partner - Boston Provident L.P. ; Chairman of the Board of Directors - Robert F. Kennedy Center for Justice & Human Rights • Bennett Freeman, SVP, Sustainability Research and Policy - Calvert Investments • Mark D. Sloss, Executive Director, Sr. Portfolio Manager - UBS Wealth Management Americas
5:15 PM – 6:00 PM	<p>“PUBLIC PRIVATE PARTNERSHIPS/GLOBAL CSR”</p> <p>Moderator: Laura Herman, Managing Director - FSG</p> <p><i>Panelist:</i></p> <ul style="list-style-type: none"> • Bulbul Gupta, Head of Market-Based Approaches - Clinton Global Initiative • Judith Moore, Consultant, Environment and Corporate Responsibility, Treasury & former Head of CSR - World Bank • Sharon D’Agostino, VP, Corporate Citizenship - Johnson & Johnson • Mauricio Barbeiro, Sustainable Business Manager - Banco Santander Brasil
6:00 PM – 6:45 PM	COCKTAIL RECEPTION