

TBLI CONFERENCE™ EUROPE 2009

12 & 13 November 2009 - Elicium, RAI Convention Centre, Entrance D & Amsterdam Okura Hotel*****, Amsterdam, The Netherlands

Location	Elicium, RAI Convention Centre, Entrance D & Amsterdam Okura Hotel*****, Amsterdam, The Netherlands
Dates	12 & 13 November 2009
Description	The largest annual global networking and learning event on Environmental, Social and Governance (ESG) Investing of Europe and Asia. Theme for 2009: Retooling the Economy.

Thursday, 12 November 2009

09:00 - 09:05

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Welcome

Robert Rubinstein - Founder and Chief Executive Officer - TBLI Conference B.V./TBLI Consulting B.V.

Thursday, 12 November 2009

09:05 - 09:30

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Conference Opening

Job Cohen - Mayor - City of Amsterdam

Thursday, 12 November 2009

09:30 - 10:00

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Keynote Speaker

Wendell Potter - Senior Fellow on Health Care - Center for Media & Democracy

Thursday, 12 November 2009

10:00 - 11:30

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

TBLI Roundtable Challenge 1 - Integrating ESG into Investment Portfolios

Alfred J.M. Kool - Partner - Kool Baas & De Quelerij, Communication and Marketing

David Creighton - Chief Executive Officer - Cordiant Capital

Ran Fuchs - Global Head of Environmental, Social and Governance Investing - RiskMetrics Group

Wolfgang Pinner - Head of SRI - Erste-Sparinvest KAG

Michael Jantzi - Chief Executive Officer - Sustanalytics

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Thursday, 12 November 2009

11:30 - 12:00

*Elicium 1, RAI Convention Centre,
Amsterdam, The Netherlands*

Coffee Break

Thursday, 12 November 2009

12:00 - 12:30

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Keynote Speaker

Karl-Henrik Robèrt - Founder and Director - Det Naturliga
Steget - The Natural Step

Thursday, 12 November 2009

12:30 - 13:00

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Keynote Speaker

Lewis Gordon Pugh - Environmentalist, Explorer, Swimmer

Thursday, 12 November 2009

13:00 - 13:05

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

Short Workshop Briefing

Moderators provide quick outline of their workshops in order
to help attendees choose out of 20 sessions.

Thursday, 12 November 2009

13:05 - 14:30

*Elicium 1, RAI Convention Centre,
Amsterdam, The Netherlands*

Lunch

Thursday, 12 November 2009

14:30 - 16:15

*Room D201, Elicium, RAI
Convention Centre, Amsterdam,
The Netherlands*

Workshop 1 - Microfinance

Ronald Lubberts - Managing Director - Sustanalytics
Netherlands

Mitchell Lench - Partner - Treetops Capital

Peter F. Hinton - Chief Executive Officer - Summit
Development Group

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Paolo Sardi - Chief Executive Officer and Founding Partner - ECPI

Thursday, 12 November 2009

14:30 - 16:15

Room D202, Elicium, RAI Convention Centre, Amsterdam, The Netherlands

Workshop 2 - TBLI in Emerging Markets

Geoffrey Mazullo - Director - East-West Management Institute

Cyrille Arnould - Head of GEEREF - European Investment Bank Group

Sarita Bartlett - Investment Manager ESG - Norfund

Alka Banerjee - Vice-President Global Equities - Standard & Poor's Index & Portfolio Services

Thomas Motsch - Fund Manager - Erste-Sparinvest KAG

Thursday, 12 November 2009

14:30 - 16:15

Room D203, Elicium, RAI Convention Centre, Amsterdam, The Netherlands

Workshop 3 - Impact Investing

Global Impact Investing puts capital to work at scale to generate social and environmental value in addition to financial return. The emerging impact investing industry endeavors to invest substantial capital to solve previously intractable social and environmental challenges.

Amit Bouri - Director of Strategy & Development - Global Impact Investing Network

Harry Hummels - Director - SNS Asset Management N.V.

Roger Frank - Managing Partner - I3 Advisors LLC (Head Office)

Hamid Tawfiki - Chief Executive Officer - Avenir Global Investment Advisory SA

James Vaccaro - Head of Investment Banking - Triodos Bank

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Room D204, Elicium RAI
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The Netherlands

Workshop 4 - Investment Performance Standards

How to measure the investment performance of fund managers? Which standards are currently a hot issue?

Robert Earhart - Consulting Director - TBLI GROUP™

William Russell-Smith - Managing Director - AQ Research Ltd

Claudia Kruse - Senior Governance & Sustainability Specialist - APG All Pensions Group

Raymond Van Ermen - Director - EPE-European Partners for the Environment

Stanislas Dupré - General Director - UTOPIES©

Thursday, 12 November 2009

14:30 - 16:15

Room D503, Elicium, RAI
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The Netherlands

Workshop 5 - Fund Performance and Strategy

Using active ownership as a means of improving corporate ESG performance and financial returns.

Giulio Franzinetti - Member of the Advisory Board - TBLI GROUP™

O. Sam Folin - Managing Director - Benchmark Asset Managers LLC

Chris Vincent - Head of Activism - Principle Capital

Paavo Pöld - Co-Founder and Partner - Limestone Investment Management

César De Brito - Partner - Eco Responsible Capital Partners

Thursday, 12 November 2009

16:15 - 16:45

Elicium 1, RAI Convention Centre,
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Coffee Break

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Workshop 6 - TBLI and High Net Worth Wealth Management

Angela de Wolff - Founder and Chief Executive Officer -
ConSer Invest SA

Thomas W. Van Dyck - Senior Vice President, Financial
Consultant SRI Wealth Management Group - RBC Wealth
Management

Erol Bilecen - Head Client Services Sustainable Investment
- Bank Sarasin & Co. Ltd

Anders Faijersson Ferguson - Partner, Chief Strategist -
Veris Wealth Partners

Thursday, 12 November 2009

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Workshop 7 - Social Entrepreneurs

Is Peer-to-Peer Lending an answer to the lack of credit in the
market?

Maritta R.v.B. Koch-Weser - Chair, Board of Trustees - The
Global Exchange for Social Investment - GEXSI

Mel Young - President - Homeless World Cup

Mark Campanale - Advisor - Halloran Philanthropies

Thierry Sanders - Founder and Director - BiD Network

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Workshop 8 - TBLI and the Copenhagen Climate Council

One of the aims of "Copenhagen" is to demonstrate and
promote that tackling climate change has the potential to
create huge opportunities for innovation and economic
growth. Can and will the financial community contribute to
"Copenhagen"? What does the financial community think
about chances for success and failure of "Copenhagen"?

Paul E. Metz - Managing Consultant - INTEGeR Consult

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Jurgen Rigterink - Chief Investment Officer / Member of the
Management Board - Netherlands Development Finance
Bank

Christophe Churet - Analyst - SAM

Gudrun Timm - Vice President for Product Innovation - DEG
- Deutsche Investitions- und Entwicklungsgesellschaft

Thursday, 12 November 2009

16:45 - 18:15

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Workshop 9 - TBLI and Health Care as a Human Right

Ivan Wolffers - Professor in 'Health Care in Developing
Countries' - Vrije Universiteit Amsterdam

Femke Markus - Managing Director - Access to Medicine
Index

My-Linh Ngo - Associate Director SRI Research -
Henderson Global Investors Limited

Wendell Potter - Senior Fellow on Health Care - Center for
Media & Democracy

William C. Osborn - Managing Partner - Commons Capital
LP

Lisa Conte - Founder and Chief Executive Officer - Napo
Pharmaceuticals, Inc.

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Workshop 10 - Water

Ronald Lubberts - Managing Director - Sustainalytics
Netherlands

Steven A. Falci - Vice President Sustainable Investment -
KBC Asset Management Limited

Kajetan Hetzer - Sustainability analyst, SR Investment
consultant - SNS Asset Management / SNS REAAL Water
Fund

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Amanda J. Sauer - Senior Associate - World Resources
Institute

Thursday, 12 November 2009

18:30 - 19:30

Foyer I+II, Amsterdam Okura
Hotel*****, Amsterdam, The
Netherlands

Dinner Cocktail

Thursday, 12 November 2009

19:30 - 21:30

Grand Ballroom, Amsterdam
Okura Hotel*****, Amsterdam, The
Netherlands

Grand Dinner (Invitation Only)

Thursday, 12 November 2009

20:15 - 20:45

Grand Ballroom, Amsterdam
Okura Hotel*****, Amsterdam, The
Netherlands

ESG Leaders Awards Ceremony

Awarded by Investments & Pensions Europe (IPE) in cooperation with TBLI CONFERENCE™ Best Research house/Consultant in ESG Most Innovative Development Related to ESG Outstanding Contributor to Development in ESG Best Asset Manager investing in ESG Best Investor in ESG

Thursday, 12 November 2009

21.30

Grand Ballroom, Amsterdam
Okura Hotel*****, Amsterdam, The
Netherlands

Closure of First Conference Day

Thursday, 12 November 2009

22:00

Jimmy Woo, Korte
Leidsedwardsstraat 18, 1017 RC
Amsterdam Tel +31 20 626 31 50

After Dinner Party - Sponsored by SAM, STOXX and Dow Jones Indexes

Please note: There is a regular taxi stand in front of the

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Okura Hotel or call +31 20 777 77 77

----- Luxurious nightclub
and lounge Jimmy Woo welcomes you to his club and lounge. Enter the Woo and experience his extraordinary taste for luxury, style and glamour. His knowledge and love for the orient and his refined feeling for the newest trends in music and design are portrayed in the style of the club. Jimmy Woo will take you to a breathtaking world combining authentic oriental art and modern western elements. Jimmy Woo likes extravagance but also appreciates privacy. Both aspects are reflected in the design and the bar layout. Gold leaf, black lacquer walls, Japanese lanterns and a genuine antique opium bed remind one of the closing moments of ONCE UPON A TIME IN AMERICA. Jimmy Woo offers the state-of-the-art in twenty-first century entertainment, with the very best sound system imported from London and a fascinating illuminated ceiling, revealing more than twelve thousand tiny light bulbs. Style and glamour The décor of Jimmy Woo exists of authentic Asian and modern Western elements, using chic and sexy materials such as leather, booklet gold, silk and other unique fabrics exclusively designed for his taste. Jimmy Woo's choice of these oriental antique furniture pieces date as far back as the 18th century. This includes antique lamps, tables and an authentic original opium bed which is off set by modern elements including soft lights emanating from the floor. The chic lounge upstairs is where Jimmy greets his guests. It exists of the trendy booths where you can have your most private conversations, and the sexy main lounge area. Jimmy Woo has been inspired by certain well-known artists. The visitor will immediately be taken by the sensually stimulating photographs by the Dutch photographer Paul Berends, murals by Mark van Holden and the ingenious interior design created by the trendsetting bureau, B.Inc. Interior Stuff of Eric Kuster. They have created a fitting backdrop for the expert team of cocktail shakers, top DJs and managers.

http://www.jimmywoo.com/jimmy_woo.html

Friday, 13 November 2009

09:00 - 10:45

Room D201, Elicium, RAI
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Workshop 11 - Rating Methodology

Robert Earhart - Consulting Director - TBLI GROUP™

Lisa Hayles - Senior Client Relationship Manager - Ethical
Investment Research Services (EIRIS) Ltd.

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Christopher Greenwald - Director of Data Content -
ASSET4

Estelle Mironesco - SRI Department Director - Vigeo Group

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09:00 - 10:45

Room D202, Elicium, RAI
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Workshop 12 - Alternative Investments

Giulio Franzinetti - Member of the Advisory Board - TBLI
GROUP™

Juergen Habichler - Founding Partner - Mountain Cleantech
AG

Adam Seitchik - Managing Director - Auriel Capital

William C. Crerend - President and Chief Executive Officer -
EACM Advisors LLC

Erik Eidolf - Executive Director - Harcourt Investment
Consulting

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09:00 - 10:45

Room D203, Elicium, RAI
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Workshop 13 - Voluntary Guidelines: Greenwashing or Genuine TBLI Mobilization?

Leo Johnson - Partner - PriceWaterhouseCoopers

Oliver Jaeggi - Managing Partner/ Chairman - ECOFACT
AG

Viktor Andersson - Manager-Investor CDP Europe & Asia -
Carbon Disclosure Project

Lorenzo Saà - Assessment and Training Manager -
Principles for Responsible Investment Initiative

Friday, 13 November 2009

09:00 - 10:45

Room D204, Elicium, RAI
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Workshop 14 - Mudharabah, Wadiah, Musharakah, Ijarah - Islamic Finance

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Robert Rubinstein - Founder and Chief Executive Officer -
TBLI Conference B.V./TBLI Consulting B.V.

Michael Gassner - Vice-President - Bank Sarasin & Co. Ltd

Hans Visser - Professor Emeritus of International Economics
and Money and Banking - Vrije Universiteit Amsterdam

Niels Muller - Tax Lawyer - Loyens & Loeff

Kees Hooft - Banking and Finance Lawyer - Loyens & Loeff

Friday, 13 November 2009

09:00 - 10:45

*Room D503, Elicium, RAI
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The Netherlands*

Workshop 15 - Carbon Finance

Paul E. Metz - Managing Consultant - INTEGeR Consult

Yoshimi Ichishima - Deputy General Manager, Structured
Finance Division I - Mitsubishi UFJ Trust and Banking
Corporation Co., Ltd.

Laurent Milliat - Sustainability Analyst - Dexia Asset
Management

Pano Kroko - Chairman - Environmental Parliament

Friday, 13 November 2009

10:45 - 11:15

*Elicium 1, RAI Convention Centre,
Amsterdam, The Netherlands*

Coffee Break

Friday, 13 November 2009

11:15 - 13:00

*Room D201, Elicium, RAI
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Workshop 16 - Biodiversity Investment

Maurits Groen - Director - Groen Milieu & Communicatie
B.V.

Francis Vorhies - Director - Earthmind

Neil McIndoe - Head of Environmental Finance - Trucost Plc

Annelisa Grigg - Project Director, Natural Value Initiative -

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Fauna & Flora International (FFI)

Friday, 13 November 2009

11:15 - 13:00

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Workshop 17 - TBLI INVESTOR SALON™ - convened by USAID ECO-Asia Clean Development and Climate Program

This session will witness the business plan presentation by the clean energy businesses/ projects selected and mentored by USAID ECO-Asia. USAID ECO-Asia has two clean energy finance initiatives, namely, China PFAN (Private Finance Advisory Network) for China, and ACEBA (Asia Clean Energy Business Accelerator) for the Asia region. These initiatives identify the profitable clean energy businesses/projects with good scale-up potential having excellent management teams and technological edge, and which are socially responsible and environmentally beneficial. The selected entrepreneurs receive pro-bono mentoring and extensive technical support to develop the business plan, investment pitch and a PPT presentation. USAID ECO-Asia facilitates the connection with Investment and markets through its global, regional, and local partners. The business plans showcased in the salon will be from one or more of the following sectors: • Energy efficiency • Biomass • Solar • Wind/ micro-wind • Hydro power/mini-hydro • Geothermal • Tidal/ocean energy • Waste to energy • Clean transportation

Suneel Parasnis - Team Leader Clean Energy Finance -
USAID Eco-Asia Clean Development and Climate Program

Suwardi - Director - PT Selo Kencana Energi

Yuan Xiulan - General Manager 袁喜兰 - Beijing CXTD Energy
Technology Co., Ltd. (北京信通能源技术有限公司)

Zhao Xu 赵旭 - General Manager 赵旭 - Nanjing Longterm
Environmental Technology Development Co., Ltd.
(南京长期环境科技发展有限公司)

Friday, 13 November 2009

11:15 - 13:00

Room D203, Elicium, RAI
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Workshop 18 - Green Real Estate

Bob Mann - Managing Director, North America -

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Jantzi-Sustainalytics

Kees Noorman - Director Business Development and
General Affairs - William McDonough + Partners EU

Magnus Furugård - President and Managing Director - GES
Investment Services

Oliver Schneider - Director - Facility:Innovate

Wendy Rowden - Managing Director, Investment Practice -
Jonathan Rose Companies

Friday, 13 November 2009

11:15 - 13:00

Room D204, Elicium, RAI
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The Netherlands

Workshop 19 - The Financial Sector's Role on Ethics in Finance

Bernd Jan Sikken - Associate Director, Financial Institutions
Industries, Head of Project Mgmt, Centre for Global
Industries - World Economic Forum

Raj Thamotheram - Senior Advisor - AXA Investment
Managers Ltd

Kasper Jacobsen - Chief Portfolio Manager - Sparinvest

Giuseppe van der Helm - Executive Director - Dutch
Association of Investors for Sustainable Development
(VBDO)

Friday, 13 November 2009

11:15 - 13:00

Room D503, Elicium, RAI
Convention Centre, Amsterdam,
The Netherlands

Workshop 20 - TBLI ACADEMY™ on Integrating ESG into Portfolios

Roger Frank - Managing Partner - I3 Advisors LLC (Head
Office)

Floris Lambrechtsen - Director - Double Dividend B.V.

Masja Zandbergen - Double Dividend B.V.

Ivo Knoepfel - Managing Director - onValues Ltd.

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Amanda Young - SRI Officer - Newton Investment
Management Ltd.

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13:00 - 14:30

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Lunch

Friday, 13 November 2009

14:30 - 16:30

*Elicium 2, RAI Convention Centre,
Amsterdam, The Netherlands*

TBLI Roundtable Challenge 2 - Financial Integrity

Paul Clements-Hunt - Coordinator Finance Initiative - UNEP
FI

Laura Berry - Executive Director - ICCR-Interfaith Center on
Corporate Responsibility

Jermyn P. Brooks - Chair, Business Advisory Board -
Transparency International

George Muzinich - Chief Executive Officer - Muzinich & Co.,
Inc.

Boudewijn de Blij - Director - Fonds 1818

Annemieke Roobeek - Founder and Chief Executive Officer
- MeetingMoreMinds

Friday, 13 November 2009

16:30 - 16:35

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Official Closing

Robert Rubinstein - Founder and Chief Executive Officer -
TBLI Conference B.V./TBLI Consulting B.V.