



# Milwaukee Chapter ISCEBS

## Milwaukee Chapter ISCEBS Program Sustainable, Responsible and Impact Investing Tuesday, June 12, 2018

The Milwaukee chapter invites you to "Sustainable, Responsible and Impact Investing" on Tuesday, June 12, 2018 at the Western Racquet Club in Elm Grove, WI.

Sustainable, responsible and impact (SRI) investing is a rapidly growing field, with nearly \$9 trillion of professional assets under management. SRI investment strategies incorporate environmental, social and governance (ESG) criteria in the securities selection process. In October 2015, the Department of Labor issued an interpretive bulletin that states "fiduciaries need not treat commercially reasonable investments as inherently suspect or in need of special scrutiny merely because they take into consideration environmental, social or other factors".

This presentation will focus on the history of SRI, current methodology risk/return analysis and the implementation of ESG strategies in qualified retirement plans.

**DATE:** Tuesday, June 12, 2018

**TIME:** 11:30 am - 12 noon - Registration and Lunch (included)  
12 noon - 1:15 pm - Presentation and Q&A

**LOCATION:** Western Racquet Club  
1800 Highland Drive  
Elm Grove, WI  
[Directions](#)



**COST:** **FREE** - Milwaukee and Chicago Chapter Members (with advance registration)  
**\$10** - Non-member/Guest

**REGISTRATION:** Please [click here](#) to register.

**RSVP:** Please **RSVP by June 5, 2018**

**CANCELLATIONS:** A refund will not be given if your registration is cancelled less than 48 hours prior to the meeting.

**QUESTIONS:** Please email [milwiscebs@gmail.com](mailto:milwiscebs@gmail.com).

**REGISTER NOW**



This educational session qualifies for 1.5 CEBS continuing professional education (CPE) credit. Visit [www.cebscpe.org](http://www.cebscpe.org) for more information.

### SPEAKERS:



**Gregory D. Wait, CEBS**  
**President**

#### Falcons Rock Investment Counsel

Mr. Wait is president and founding member of Falcons Rock Investment Counsel, LLC, and of Prophecy Impact Investments, LLC. He has over 30 years of experience working with individual and institutional investors to develop appropriate investment strategies for their unique situations. Prior to founding Falcons Rock, Mr. Wait held advisory and management positions with investment management firms. He earned a bachelor of business administration degree from the University of Wisconsin-Whitewater and has maintained a commitment to education and professional training.

Mr. Wait holds the Certified Employee Benefit Specialist designation and is a past Fellow of ISCEBS. He is a member of the Milwaukee chapter of ISCEBS and a past Director and Chairman of the Membership Committee. Mr. Wait is also an active member of US SIF: The Forum for Sustainable and Responsible Investment, Investment Management Consultants Association, Plan Sponsor Council of America and the Wisconsin Retirement Plan Professionals, Ltd.



**Tom Simunovic**  
**Trillium Asset Management**

Mr. Simunovic joined Trillium in 2016 and works with financial advisors on the firm's sustainable and responsible investment solutions. Prior to joining Trillium, he worked in research for a seed-stage impact investment fund focused on renewable energy and for a global microfinance organization. Mr. Simunovic earned his B.A. in Global Studies from St. Lawrence University and a Master's Certificate in Impact Investing at the Middlebury Institute for International Studies. He currently volunteers for Bikes not Bombs, and is a member of BASIC (Boston Area Sustainable Investment Consortium).