Twin Cities Chapter of ISCEBS March 2020 Educational Luncheon

“What Are ESG/SRI Investments and Are They Right for Your ERISA Plan?”

Speakers:
Alix Magner, Morgan Stanley
Kathi Wright, Gallagher Benefit Services

Environmental, Social, and Governance (ESG) criteria and Socially Responsible Investing (SRI) aren’t new. But, they are getting more attention from retirement plan sponsors, participants, and plan advisors.

You and your participants may be concerned about the climate crisis and whether your investment dollars should be supporting fossil fuels, tobacco growers or gun manufacturers. As a plan sponsor or consultant, you’re worried about the fiduciary issues surrounding offering these types of investments.

Please join us as Alix Magner and Kathi Wright help us understand how to manage the legal and financial risks and opportunities of ESG/SRI investments in a way that adds value for your plan participants. Our discussion will address such issues as:

* What is sustainable investing? SRI? ESG?
* Sustainable investing in the news
* Fiduciary duty and DOL guidance
* Pros and cons of adding sustainable investing options
* How to evaluate and monitor these funds to comply with guidance

Continuing Education Credit has been applied for in the State of Minnesota. IF APPROVED, 1 credit hour will be available.

WHEN
Wednesday, March 25, 2020
11:15am - Registration and Networking Meet & Greet
11:30am - Lunch
11:55am - Chapter Welcome
12:00pm - Speaker Presentation

WHERE
Golden Valley Golf and Country Club
7001 Golden Valley Road, Golden Valley, MN 55427

FEE
Current TCISCEBS Chapter Member Fee - $40.00
Non-Member Fee - $60.00
(If registered by Friday, March 20th. After this date, an additional $5.00 fee will be imposed)

REGISTRATION DEADLINE
Friday, March 20th, 2020

CANCELLATION DEADLINE
Thursday, March 19th, 2020

Please respond by clicking one of the buttons below