



**100 women in
hedge funds®**

**Education Session No. 142:
State of Connecticut Treasurer's Office to Lead Panel on ESG (Sustainable Investing)**

June 4, 2009 at 6 PM
Greenwich CT

Sustainable investing (a/k/a 'socially responsible investing') has become a standard part of the lexicon and investing philosophy of some of the world's largest investors, their consultants and asset managers. But what is it exactly? Join our panel to find out what 'sustainable investing' means in real terms for various practitioners in the financial industry. Our panel will examine the key issues of performance, materiality of ESG analysis in investment decisions and outlook for the industry.

Participants

Meredith Miller, State of CT
Jed Emerson, Uhuru
Michael Lent, Veris Wealth Partners
Dawn Edwards, *Moderator*, AltruShare Securities

Event Details

Date: June 4, 2009
Time: 5:30 PM Registration.
We will begin *promptly* at 6 PM; please arrive early.
Host: Goldentree Asset Management
Location: Greenwich Library
110 West Putnam Avenue, Greenwich, CT 06830
RSVP: http://www.100womeninhedgefunds.org/pages/event_registration.php

This event is NOT FOR ATTRIBUTION.

This event is not endorsed by Greenwich Library.

Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to our 2009 beneficiary, Computers for Youth.

If you have no-show fees in arrears, the system cannot register you for an event. Fees can be paid online at:
https://www.100womeninhedgefunds.org/pages/noshow_payment.php

Space is limited. No walk-ins will be permitted.

Biographies

Meredith Miller, Assistant Treasurer for Policy, State of CT

Meredith Miller is the Assistant Treasurer for Policy the State of Connecticut Treasurer's Office. Meredith's responsibilities include the development of a corporate governance and responsible investment program for the \$20 billion state employee pension fund. Meredith is also responsible for policy initiatives related to economic development, retirement policy and financial literacy for low- income families.

Prior to joining the Treasury in March 1999, Meredith served in the Clinton Administration as Deputy Assistant Secretary for Policy in the Department of Labor's Pension Welfare Benefit Administration. This agency is responsible for the enforcement of ERISA's private sector health and pension benefits. During her tenure there, the agency issued the interpretative bulletins relating to proxy voting, ETIs, 401(k) fees, and soft dollars.

From 1988 to 1993, Meredith was the Assistant Director of the Employee Benefit Department at the AFL-CIO. Prior to that she was the Assistant Director of Research for Employee Benefits for the Service Employees International Union.

Meredith has a B.A. from Hampshire College and a Masters from the London School of Economics.

Jed Emerson, Partner, Uhuru

Jed Emerson is a partner with Uhuru Capital Management, an investment firm pursuing full financial returns for investors together with global social/economic development impacts. Uhuru's first product, a global fund of hedge funds, was launched in March of 2009. The firm's investment strategy focuses upon identifying and investing in fundamental fund managers across a variety of mandates. Uhuru is an integrated firm which contributes one quarter of its firm profits to support the expansion of social entrepreneurship in emerging markets, both domestic U.S. and around the world.

As Director of Integrated Performance, he is charged with overseeing and executing Uhuru's approach to augmenting financial analysis with sustainability and economic development insights, as well as promoting an overall vision for the expansion of communities working to take social entrepreneurship to greater scale. He is also a member of the firm's investment committee and works with Uhuru and other investors to explore how they may attain maximum, total value through leveraging their market rate investing with their philanthropic and life strategies.

Jed is recognized as an international leader in the field of strategic philanthropy and impact investing. His work on performance measurement, nonprofit capital markets, foundation strategy, Social Return on Investment frameworks, sustainable business development and other areas of practice has been viewed as significant in its broad contribution to the field and efforts to support others engaged in the community and social application of business skills and practice.

Michael Lent, CIO, Veris Wealth Partners

Michael brings extensive experience in aligning sound investment planning with his clients' values. Prior to Veris, Michael was the Manager of the New York office of Progressive Asset Management for 13 years. Michael specializes in sustainable wealth management consulting for individuals, foundations and non-profit organizations, and is a Certified Investment Management Analyst (CIMA).

Michael chairs the Veris Investment Committee and Investment Working Group. He has extensive knowledge on the evolution of sustainable investing and its impact in portfolios. He is responsible for Veris' strategic and tactical allocation decisions.

Michael is a trustee of The Edward W. Hazen Foundation, a private foundation established in 1925, which seeks to assist young people, particularly minorities and those disadvantaged by poverty, to achieve their full potential as individuals and as active participants in a democratic society. He also serves on the Board of Directors of Lotus Music and Dance, a New York City organization that promotes traditional ethnic dance forms. Michael is a member of the Social Investment Forum, the Social Venture Network, and the Investment Management Consultant Association. Veris Wealth Partners

Veris Wealth Partners has over 75 years of experience providing sustainable investment and wealth management solutions to high net worth families, foundations, family offices and wealth advisors. Veris has \$450 million in assets under management or administration.

Veris believes sustainability matters. Companies and families implementing green and responsible practices are tomorrow's leaders. Veris constructs portfolios and strategies that are dedicated to creating sustainable solutions that fulfill the financial and values objectives of their clients.

Veris partners with Envestnet Asset Management, Generation Investment Management and Aquillian Investments to access sustainable asset managers, customized ESG screening tools and state of the art investment vehicles. Veris is an SEC Registered Investment Advisor with offices in New York, San Francisco & Portsmouth

Dawn Edwards, Co-Founder, AltruShare Securities

Dawn began her career at Lazard Freres in 1987. During her tenure, her duties included program trading, technology, and soft dollar management. In 1997, she joined GENA, a woman-owned international broker dealer servicing institutional clients in ADRs, developed and emerging markets. In 2000, Dawn joined BNY Global Transition Management and handled transitions for public and corporate plan sponsors, endowments, foundations and Taft-Hartley clients. In 2006, Dawn became President of AltruShare Securities.

AltruShare Securities was co-founded in 2006 by Peter Drasher and Dawn Edwards. AltruShare offers comprehensive and competitive institutional brokerage services to public and corporate plan sponsors, endowments and foundations, as well as the institutional money management community. In September 2006, AltruShare broke new ground as both the first institutional brokerage firm to specialize in community investment and the first Community Investment Enterprise in the industry. Community Investment Enterprises are for-profit businesses created to provide a sustainable source of support for underserved communities. AltruShare's profits fund new models of customized community investment to maximize impact in the communities in which AltruShare conducts business.

About Goldentree Asset Management

Founded in 2000, GoldenTree is one of the largest independent managers of fixed income credit funds, with assets under management of approximately \$10.2 billion. Based in New York, with offices in London, Luxembourg and São Paulo, GoldenTree provides investment services to institutions and high net worth individuals. GoldenTree is a fundamental value investor with an event driven, total return focus. GoldenTree believes that bottom-up research is the only way to exploit inefficiencies in high yield to identify credits that can provide both yield and capital appreciation. In order to efficiently execute our investment process, GoldenTree has established a strong, global franchise based on substantial infrastructure and significant local presence.

Currently the firm has over 200 employees and 19 partners. The firm is entirely owned by its employees. The significant dislocation caused by the deleveraging and forced selling that began in July 2007 in credit has created an unprecedented environment in the credit markets. For more information on GoldenTree, please visit our website: www.goldentree.com

Give Back

100 Women in Hedge Funds provides a 'Give Back' program that enables members to match their resources (time, access, financial) to projects that will help us expand our successful initiatives. Visit http://www.100womeninhedgefunds.org/pages/give_back.php today and tell us how you can help.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds serves over 10,000 alternative investment management investors and practitioners through unique educational, professional leverage and philanthropic initiatives. Since its first session in 2002, 100 Women in Hedge Funds has hosted more than 150 events globally, connected more than 150 senior women through Peer Advisory Councils and raised in excess of \$15 million for philanthropic causes in the areas of women's health, education and mentoring.