



Celebrating the milestone of 100WHF's 500th Education event

Environment, Social and Governance (ESG) Investing

November 3, 2015 at 6 PM
Minneapolis, MN

Environment, Social and Governance (ESG) investing has become a popular topic within the investment community - but this familiar buzzword means different things to different people. We've assembled an exciting panel of allocators to share their insights on the fundamentals, growth in the space and criteria they look for in ESG investments.

Please join us for a special panel discussion on Tuesday, November 3, 2015. All investment professionals are invited.

Participants

Rochelle Gunn, HRK Group
Amy L. Jensen, Northwest Area Foundation
Elizabeth E. McGeeveran, The McKnight Foundation
Sheila Berube, *Moderator*, NEPC, LLC

Event Details

Date: November 3, 2015

Time: 5:30 PM Registration.

We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails will follow.

Hosts: CarVal Investors and Bloomberg

Location: The Minikahda Club

3205 Excelsior Blvd, **Minneapolis**, MN 55416 - [Directions](#)

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [Minneapolis](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

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

Biographies

Rochelle Gunn, Chief Investment Officer, HRK Group

Rochelle Gunn is the chief investment officer of HRK Group, Inc. (HRK), a single-family office in Saint Paul, Minnesota. HRK provides integrated financial services to 20 fourth through sixth generation family members. Rochelle is responsible for setting the strategic asset allocation for two global investment portfolio and execution of all investment activities to meet the long term goals for the current and future beneficiaries of the family's wealth.

Prior to joining HRK in 2008 Rochelle served as portfolio manager at Waycrosse, Inc. a single-family office in Wayzata, Minnesota. At Waycrosse she was responsible for managing the global fixed income and global active equities portfolios. Rochelle is a Chartered Financial Analyst and has a bachelor's degree in finance and economics.

Amy L. Jensen, Investment Director, Northwest Area Foundation

Amy Jensen is the Investment Director for the Northwest Area Foundation. Having joined the Foundation in 2013, Amy leads the investment of the Foundation's \$450 million portfolio with responsibility for all asset classes and strategies. The mission of the Foundation is to support the efforts by the people, organizations and communities of our eight-state region to reduce poverty and achieve sustainable prosperity.

Immediately prior to joining the Northwest Area Foundation, Amy worked for the Margaret A. Cargill Philanthropies as a portfolio manager. In this role she managed the assets of the Margaret Cargill Foundation, Akaloa Resource Foundation and the Anne Ray Charitable Trust. Amy previously worked in the Investments Office at Bowdoin College in Brunswick, ME. The Investments Office is responsible for the management of the College's internally managed endowment.

Elizabeth E. McGeeveran, Director of the Impact Investing Program, The McKnight Foundation

Elizabeth E. McGeeveran is the Director of the Impact Investing Program at The McKnight Foundation (www.mcknight.org). With a new board commitment to channel \$200 million into profitable investments aligned with the foundation's support for climate change solutions, a clean Mississippi River and community development, Elizabeth is seeking opportunities in direct investments, private equity, public markets and lending.

Prior to McKnight, Elizabeth was the Senior Vice President for Governance & Sustainable Investment at F&C Asset Management, a London-based \$150 billion commercial asset manager. For over more than a decade, Elizabeth built F&C's market-leading socially responsible investment business and spearheaded investor engagement with large U.S. companies. Specializing in the oil & gas and pharmaceutical sectors, she has served on external advisory committees for companies such as ExxonMobil and General Electric and worked closely on business systems such as tying executive compensation to company performance and reducing labor risks in supply chains.

Elizabeth was managing director of Co-op America (now Green America), a national nonprofit consumer and investor education organization as well as serving as the media director for the U.S. Social Investment Forum.

Sheila Berube, Senior Consultant, NEPC, LLC

Sheila Healy Berube joined NEPC, LLC, a nationally recognized investment consulting firm based in Boston, in 2012 with twenty years of broadly based investment experience in nonprofit healthcare, corporate pensions and family offices. She has been recognized as a "Woman to Watch" by Minneapolis St. Paul Business Journal and was an Institutional Investor's Award for Excellence in Investment Management for Corporate Fund Manager of the year finalist.

She is a member of the Philanthropic Practice Group, servicing endowments and foundations, healthcare and high net worth clients. In support of her client relationships, Sheila is responsible for overall portfolio design, including asset allocation and investment policy development, risk budgeting and liquidity analysis, evaluation and selection of investment managers, and performance monitoring. She is a member of the Impact Investing Advisory Committee at NEPC.

Prior to NEPC, Sheila was the Chief Investment Officer at WLD Enterprises, Inc. a family office of multiple generations. Prior to WLD, Sheila was Manager, Benefit Funds Investment at 3M Company. Prior to her experience at 3M she served as and Director, Cash & Investment for Allina Health System. She also served as the Manager of External Fixed Income assets at the Minnesota State Board of Investment and began her investment career with American Express Financial Advisors.

Sheila earned her M.B.A. in Finance from the University of St. Thomas and a B.A. in English with a minor in Business from Marquette University. She holds the Chartered Financial Analyst (CFA) designation. Sheila has been an active community volunteer and currently sits on the investment committee of The Sisters of St. Joseph.



About CarVal Investors

CarVal Investors is focused on distressed and credit-intensive assets and market inefficiencies. Since 1987, our experienced team has navigated through ever-changing credit market cycles, opportunistically investing \$85 billion in 5,300 transactions across 74 countries. Today, CarVal Investors has approximately \$10 billion in assets under management in both credit and real estate strategies.

Bloomberg

About Bloomberg

Bloomberg, the global business and financial information and news leader, gives influential decision makers a critical edge by connecting them to a dynamic network of information, people and ideas. The company's strength - delivering data, news and analytics through innovative technology, quickly and accurately - is at the core of the Bloomberg Professional service, which provides real time financial information to more than 325,000 subscribers globally. For more information, visit www.bloomberg.com/company.



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100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted close to 500 industry education events globally, connected more than 250 senior women through Peer Advisory Groups and raised over \$36 million for philanthropic causes in the areas of women's health, education and mentoring.