



# **BURRIDGE CONFERENCE**

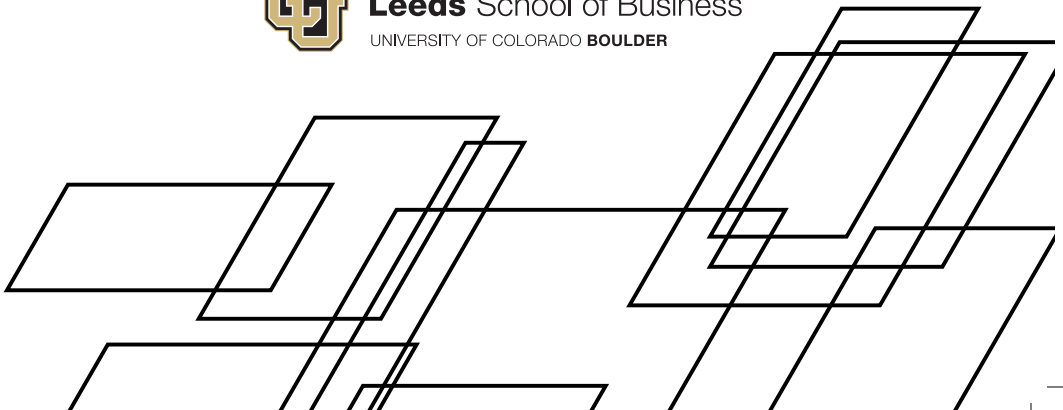
2020

**THURSDAY, FEBRUARY 27TH**  
MILE HIGH STATION

**FRIDAY, FEBRUARY 28TH**  
ARROW TOUCHDOWN CLUB, FOLSOM FIELD



**Leeds** School of Business  
UNIVERSITY OF COLORADO **BOULDER**



## **SITDOWN & WELCOME | 6:20 P.M.**

### **Roberto Caccia**

Executive Director, *Burrige Center for Finance,*  
*University of Colorado Boulder*

## **OPENING REMARKS**

### **Jena Griswold**

Colorado Secretary of State

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## **PANEL A.1 | 7 P.M.**

**Business Decisions with an ESG Mindset**

## **MODERATOR**

### **Josh Whitney**

Executive Director, North American lead, *Anthesis Group*

## **PANELISTS**

### **Om Bhatia**

Chief Financial and Revenue Officer, *Paracel S.A.*

### **Michael LaMotte**

Senior Managing Director, *Guggenheim Partners*

### **Gerrit Nicholas**

Co-Founder and Managing Partner, *Orion Energy Partners*

## **PANEL A.2 | 8 P.M.**

**ESG & The General Public - Where to Invest?**

### **MODERATOR**

**Cyndi Thomas**

Managing Director, Institutional Advisory Services,  
*RCLCO Real Estate Advisors*

### **PANELISTS**

**Stephanie Copeland**

Managing Partner, *Four Points Funding*

**Dixon Dick**

Executive Director, *CoSolve*

**Carla Fredericks**

Director of the American Indian Law Clinic and Director of First Peoples Worldwide, *American Indian Law Clinic*

## **WELCOME | 8:30 A.M.**

### **Roberto Caccia**

Executive Director, *Burridge Center for Finance,*  
*University of Colorado Boulder*

### **Heidi VanGenderen**

Chief Sustainability Officer, *University of Colorado Boulder*

## **OPENING REMARKS | 8:45 A.M.**

### **Jena Griswold**

Colorado Secretary of State

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## **PANEL B.1 | 9 A.M.**

The Other “E” in ESG (Energy)

## **MODERATOR**

### **Tim Wolf**

President, *Wolf Interests*

## **PANELISTS**

### **Alice Jackson**

President, *Xcel Energy Colorado*

### **Reuben Munger**

Managing Partner, *Vision Ridge Partners*

### **Lang Reynolds**

Director of Electric Transportation, *Duke Energy*

### **Josh Smith**

Director, Innovation and Research, *Manna Tree Partners*

## **PANEL B.2 | 10:15 A.M.**

**Follow the (ESG) Money**

### **MODERATOR**

**Elias Bachmann**

Director of Private Investments & Portfolio Manager,  
*BSW Wealth Partners*

### **PANELISTS**

**Anthony Eames**

Director of Responsible Investment Strategy, *Calvert Research and Management*

**Patrick Lee**

Managing Regional Director, *Natixis Investment Managers*

**Todd Mathias**

Vice President, Senior ETF Product Specialist,  
*Franklin Templeton*

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## **BUFFET LUNCH | 11:30 A.M.**

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## **NET IMPACT CASE COMPETITION STUDENT PRESENTATION**

## **PANEL B.3 | 12:45 P.M.**

### **So What You Care About ESG**

#### **MODERATOR**

**Prof. Chris Leach**

W.W. Reynolds Capital Markets Program Chair  
Professor of Finance, *Leeds School of Business,*  
*University of Colorado Boulder*

#### **PANELISTS**

**Daniel Baruch**

Director, Global Energy Markets & Business Development,  
*URSA Space Systems*

**Zach Dan**

Co-Founder and Partner, *ACT Analytics*

**Jon Hale**

Head of Sustainability Research, *Morningstar*

**Pat Reilly**

Director of Analytics, *FactSet*

## **PANEL B.4 | 2 P.M.**

**Sustainability - A CU Perspective**

### **MODERATOR**

**Heidi VanGenderen**

Chief Sustainability Officer, *University of Colorado Boulder*

### **PANELISTS**

**Shaun Davies**

Assistant Professor of Finance, *Leeds School of Business, University of Colorado Boulder*

**Ryan Lewis**

Assistant Professor of Finance, Center For Research On Consumer Financial Decision Making, *Leeds School of Business, University of Colorado Boulder*

**Jason Neff**

SILC Director, Principal Investigator, Professor, *ENVS, University of Colorado Boulder*



# THANK YOU FOR ATTENDING!

Connect with us via email at  
**[burrige.center@colorado.edu](mailto:burrige.center@colorado.edu)** or visit  
**[colorado.edu/business/burrige-center](https://colorado.edu/business/burrige-center)**  
to learn about upcoming events.



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