

Growth for *Impact* Conference

Value-Aligned Investing in an Era of
Uncertainty, Change and Polarization

Agenda
November 8–11, 2026



We hope you are planning to join us at the beautiful
Sheraton Grand at Wild Horse Pass, Phoenix, AZ

AGILARIVER INDIAN COMMUNITY

Sunday, November 8, 2026

2:00 – 5:30 PM

REGISTRATION

• Akimel Foyer

Conference Registration

4:00 – 6:00 PM

EDUCATION SESSION

• Room TBD

Pre-Conference Educational Session

US SIF Fundamentals —Jenny Coombs

Plan to submit for CFP CE

Separate registration needed: ussif.org →

5:30 – 6:30 PM

GENERAL SESSION

• Room Deer/Scorpion

VADIS Update: New Functionality, New Products

Formative Team

6:15 – 7:15 PM

SOCIAL

• Akimel Lawn

Welcome Reception

Cash bar, light appetizers

7:00 PM

DINING

Dinner on Your Own

Locations on-site and nearby

Monday, November 9, 2026

7:30 AM – 6:00 PM

REGISTRATION

• Akimel Foyer

Conference Registration / Information Desk Open

7:15 – 8:00 AM

DINING

• Akimel 3/4

Continental Breakfast

7:30 – 11:00 AM

LOGISTICS

Vendor Display Setup

8:00 – 8:15 AM

GENERAL SESSION

• Akimel 3/4

Good Morning! Land Acknowledgement

Pima and Maricopa Elder

8:15 – 10:00 AM

GENERAL SESSION

• Akimel 3/4

Meet Our Hosts and Benefactors

Purpose Driven Leaders You Really Need to Know

10:15 – 11:15 AM

GENERAL SESSION

• Akimel 3/4

Plenary 1: Accountable AI: Navigating Ethics, Equity, and Impact in the Next Investment Era

Alison Wise

The Future of SRI: Sustainable, Resilient and Innovation Investing — Peter Krull, CSRIC

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11:15 – 11:30 AM

BREAK

• Akimel Foyer

Morning Break

BREAKOUT TRACKS · 11:30 AM – 12:40 PM

TRACK 1 — ESG & VALUES INTEGRATION

The Great Recalibration: When Climate Metrics and Financial Risk Disagree

Pooja Khosla, PhD; Shaheen Contractor, CFA;
John Streur; Sara Porter, JD

• Akimel 1

Expect to submit for CE

TRACK 2 — PRACTICE MANAGEMENT & PROFESSIONAL EDUCATION

Marketing in “Interesting” Times

Kylelane Purcell, Kristin Rodriguez, Fernando Pena

• Akimel 2

TRACK 3 — ADVOCACY & IMPACT

Advancing Investor Advocacy on AI: Governance, Privacy and the Environment

Kaitlyn Mitchell, Jonas Kron, Whitney Nguyen

• Deer/Scorpion

12:40 – 1:40 PM

DINING

• Akimel 3/4 or Lawn

Lunch

Sponsor: YourStake — Patrick Reid, Gabe Rissman

NETWORKING & RECREATION · 1:40 – 2:30 PM & 2:45 – 3:45 PM

BODY

1.3-mile Riverwalk Trail · Swimming Pool ·
Fitness Center · Tennis · Fusion Partner Dancing
· 2.5-mile Interpretive Trail

MIND

Huhugam Heritage Center · Art Tour · Beading
Class · Clay Pot Class

SPIRIT

Aji Spa · Land of the Mustangs · Faith? Prayer
Walk?

BREAKOUT TRACKS · 4:00 – 5:00 PM

TRACK 1 — ESG & VALUES INTEGRATION

Fixed Income as a Force for Impact, from Client Resilience to Positive Outcome

Patrick Drum, Brian Svendahl, Martha Schumann,
Yi Wei

• Akimel 1

Expect to submit for CE

TRACK 2 — PRACTICE MANAGEMENT & PROFESSIONAL EDUCATION

Winning With Values: How Advisors Use Impact Investing to Grow, Differentiate and Deepen Client Relationships

Alexa Pruss, Michael Kramer, Jock Payton, TBD

• Akimel 2

TRACK 3 — ADVOCACY & IMPACT

The SEC versus Shareholder Advocacy

Andrew Collier, TBD

• Deer/Scorpion

5:00 – 6:30 PM

GENERAL SESSION

• Akimel 3/4

Plenary 2: Wisdom from Our Veterans

Jim Horlacher, MBA, AIF; Pam Stamper-Brandt, CFP, AIF; Max Mintz

The Value of Pro Bono Work: How an Advisor Has Made an Impact and Become a Better Advisor

— Lev Mandel & Krista Scharfenberg

Fund Raiser

6:45 – 7:50 PM

DINING

• Akimel 3/4

Zodiac Dinner

Tuesday, November 10, 2026

7:30 AM – 6:00 PM

REGISTRATION

• Akimel Foyer

Conference Registration / Information Desk Open

7:00 – 7:30 AM

WELLNESS & RECREATION

• Aji Spa

Wellness Training: Strength, Cardio & Mindfulness

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7:15 – 8:30 AM

DINING • Quail

Indigenous Peoples Working Group Breakfast

Tall Grass Institute — Stephanie Russo Carroll, Vanessa Roanhorse, Casey Lozar, Kate Finn

7:40 – 8:30 AM

DINING • Akimel Foyer

Continental Breakfast

8:40 – 10:15 AM

GENERAL SESSION • Akimel 3/4

Plenary 3 : AI and Data Centers

Harry Moran, Tyson Slocum, Tom Konrad PhD CFA, Rebecca Adamson, Witold Henisz, TBD

10:15 – 10:55 AM

BREAK • Akimel Foyer and Mesquite Terrace

Networking Break & Sponsor Speed Connections

BREAKOUT TRACKS · 10:55 – 11:55 AM

TRACK 1 — ESG & VALUES INTEGRATION Accessing Private Impact Investing

Ryan Jones-Casey, CFP; Mac Liman, TBD

• Akimel 1
Expect to submit for CE

TRACK 2 — PRACTICE MANAGEMENT & PROFESSIONAL EDUCATION Role of the Advisor in an AI World

Alex Mathe-Cathala, LeAndrew Gordon, Iyassu Essayas, Lorraine Spradley Wilson
• Akimel 2

TRACK 3 — ADVOCACY & IMPACT Community Impact Investing Is a Global Imperative: Transitioning People to Global Sustainability

Anna Mabrey, Kate Finn, Jon Bishop
• Deer/Scorpion

12:00 – 1:15 PM

DINING • Akimel 3/4

Lunch

1:15 – 1:30 PM

GENERAL SESSION

US SIF Update

Maria Lettini, CEO

1:30 – 2:40 PM

GENERAL SESSION • Akimel 3/4

Plenary 4: Compliance

Kathy Lewis, William Nelson, TBD

BREAKOUT TRACKS · 2:50 – 3:50 PM

TRACK 1 — ESG & VALUES INTEGRATION Values Investing Under Fire: Fiduciary Duty, ESG and the Future of Client Portfolios

Theresa Gusman, M. Bateman or M. Friedman, TBD
• Akimel 1

Expect to submit for CE

TRACK 2 — PRACTICE MANAGEMENT & PROFESSIONAL EDUCATION Both Sides of the Table: Buying and Selling a Practice

Collin Todd, Megan Buchanan, Jan, Bryan, TBD
• Akimel 2

TRACK 3 — ADVOCACY & IMPACT Catalytic Capital in Action: How Credit Unions and CDFIs Partner with Impact Investors to Expand Economic Opportunity

Anna Smukowski, Gabriel Treves-Kagan

• Deer/Scorpion
Expect to submit for CE

3:50 – 4:15 PM

BREAK • Akimel Foyer

Networking Break

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4:15 – 5:30 PM	GENERAL SESSION • Akimel 3/4	What Is the Role of Our Industry in Preserving Our Democracy Lisa Woll, John Streur, Liz Sessler, TBD
5:30 – 6:20 PM	SIGNATURE EVENT	The Gathering: A Cultural Highlight
6:15 – 7:00 PM	SOCIAL • Akimel Foyer	Happy Hour
7:00 – 7:30 PM	GENERAL SESSION	Why We Do What We Do Patrick Reed, Gabe Rissman, Leslie Samuelrich
7:30 – 11:00 PM	DINING • Akimel 3/4	Dinner Celebration
Wednesday, November 11, 2026 FINAL MORNING		
7:45 – 10:00 AM	REGISTRATION • Akimel Foyer	Conference Registration / Information Desk Open

Hoping to see you November 8–11, 2026 at Wild Horse Pass!