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SRI, THE CONFERENCE ON SUSTAINABLE, RESPONSIBLE, IMPACT INVESTING

The Conference on Sustainable, Responsible, Impact Investing, is the industry's seminal event. The 28th annual conference is right around the corner.

Thought leaders, investors, and investment professionals from all corners of the Sustainable, Responsible, Impact (SRI) investing universe convene to gain and share knowledge and strategies that align financial performance with positive change. Conference participants are working to catalyze a shift to a more socially equitable and environmentally sustainable economy.



- The 28th Annual SRI Conference
- November 1–3, 2017
- Hotel del Coronado
- San Diego, CA

Steve Schueth, conference producer and President, First Affirmative Financial Network, sat down with SunStar Strategic's Ben Gerow, Associate Account Executive, to discuss this year's conference. They discussed the history of the conference, how to encourage networking, and why this is "THE best way for an advisor to climb the SRI learning curve."

Ben: With the rate that SRI investing is growing, how has The SRI Conference kept up with industry growth?

Steve: Ten years ago we were the only game in town; there was no real competition. But there are a lot more people and organizations engaged in the impact investing industry now. As the bigger players have gotten involved (e.g. Morgan Stanley, Goldman Sachs, State Street, BlackRock, Bain Capital, Oppenheimer, Van Eck, etc.), the growth has been spectacular. The growth of the conference has been reflective of the larger SRI/ESG industry. We hosted 742 attendees in 2016, and we're expecting 800 this year.

Ben: With more competition in The SRI Conference space, have you managed to differentiate yourself in the market?

Steve: We continue to be on the cutting edge. For example, an emerging topic we've focused on is the UN Sustainable Development Goals (SDGs). A year ago, the SDGs weren't even on the radar. But as I've observed the sustainability reports being released by global public companies over the past six months, I've noticed an increasing focus on the SDGs. On the other side of the desk, investment analysts and managers are beginning to re-tool their analysis of the data and judge

companies and their management teams based on their commitment and progress against the SDGs. I'm predicting that viewing companies as prospective investments through the lens of the 17 SDGs will be the next evolution of Sustainable, Responsible, Impact investing: SRI 3.0. This is just one example of a topic we are focusing on in November that will keep The SRI Conference ahead of the curve.

The other way we differentiate ourselves is by the number of advisors we put in the rooms. It's a two-day immersion experience where an advisor with a CFP, CFA, or CIMA designation can walk away with as many as 12 Continuing Education (CE) credits. Two days at The SRI Conference is far and away the best way for an advisor to climb the SRI learning curve.

Ben: The common takeaway from most conferences is that the most important thing you leave with is the connections you make while you're there. How does The SRI Conference encourage networking and ensure these connections are made?

Steve: I agree; the most valuable part of the conference experience is the networking; this is consistent with the feedback we receive every year. We do a number of things to facilitate robust interaction and engagement, including a lot of time in the Exhibit Hall, and a generous amount of time to Q&A and dialogue with speakers during sessions.

Nearly 40% of conference attendees have been first-time attendees in recent years. These are both new people working for companies already engaged in the SRI/ESG industry, or they are brand new to the space. We've found that The SRI Conference has become a first point of entry for people who are interested in responsible investing for positive impact.

We encourage and facilitate networking beginning with our New Participant Orientation. We walk people through the conference notebook, show them where to find things, how to use the conference app, etc., then we invite everyone to briefly introduce themselves. Most people who attend this orientation session make a handful of immediate connections they can build on and leverage during the conference.

We also offer Topic Tables which several years ago were an experiment in response to feedback where people expressed a desire for more time to talk to people who have similar interests. A Topic Table is simply a round table with ten chairs and a person who has volunteered to facilitate a conversation about a specific topic, such as the politics of climate change or sustainable agriculture. People with a personal or professional interest in that topic will sit down to discuss it. Most of the time, Topic Table participants are meeting new people with similar interests.

Ben: A big theme for impact investing is that millennials are leading the charge and are willing to sacrifice their private wealth for the public good. Is that an emphasis on this year's conference?

Steve: Not many are willing to sacrifice performance for positive impact. Fortunately, the industry has debunked that myth. The conference flows around questions of how to invest for competitive returns while having a positive impact on our world at the same time. We won't have specific sessions on millennials this year, but it's a theme that weaves throughout the program. We invite millennials to speak on panels. We have a dozen or so millennials speaking at the conference and sharing their stories - it's more of a theme than a topic focus.

Ben: Will there be any marketing/PR panels that focus on how to grow your sustainable fund?

Steve: We do have a session this year that will focus on branding and positioning an advisor's practice to attract and serve impact-oriented investors.

Ben: Do you have any final thoughts or focal points you'd like to share with the readers?

Steve: This conference has always been designed for investment professionals and it is the best place by far for a client-facing advisor to climb the learning curve and prepare to have deeper conversations with clients who care. But any investment professional who is or wants to be working to direct the flow of investment capital toward the creation of a truly sustainable future is welcome to join us November 1–3, 2017 at the Hotel del Coronado in San Diego.



Steven J. Schueth

President, First Affirmative Financial Network, LLC

*Steve Schueth is President of First Affirmative Financial Network, LLC, an investment advisory firm providing socially conscious, purpose-driven investors with Sustainable Investment Solutions. He understands that all spending, saving, and investing has impact and assists investors and investment professionals in paying attention and consciously embracing investment strategies that are positively impactful. Since 1989, Mr. Schueth has dedicated his professional life to helping direct the flow of investment capital to catalyze a shift to a truly sustainable future — a world that works for everyone. A nationally recognized authority, consultant, and resource to the responsible investment industry, he is the primary producer of **The SRI Conference** on Sustainable, Responsible, Impact Investing. The 28th annual SRI Conference will be November 1–3, 2017 at the Hotel del Coronado in San Diego.*