

JEWISH IMPACT INVESTING SUMMIT

8:30-9am Breakfast

9-9:30am Opening Remarks



Julie Hammerman is inspired by the use of investment capital and business as a force for good in the world. As the ED of JLens, she oversees the organization’s educational, advocacy, and advisory services. Julie began her career in investment banking on Wall Street, and later served as an investment advisor at JP Morgan and Merrill Lynch. She was on the founding team of a for-profit social enterprise focused on women's health. Most recently Julie was the Impact Investment Strategist at a multi-family office. Julie received her MBA from Harvard Business School and her BA in Economics from Tufts University. She is a Wexner Jewish Heritage alum, an UpStart incubator graduate, and the proud recipient of the Jewish Community Relations Council’s 2018 Innovative Leadership Award.



Dr. Stephen Freedman is provost of Fordham University and professor of ecology and evolutionary biology. He earned his B.Sc. from Loyola of Montreal, his M.E.S. from York University in Toronto, and his Ph.D. from the University of California at Irvine. Dr. Freedman joined Loyola University of Chicago in 1978 and served as professor in the Department of Natural Science, member of the graduate faculty in the Department of Biology, and dean of Mundelein College. He became academic vice president at Gonzaga University in 2002 and joined Fordham in 2007 as senior vice president and chief academic officer. In October 2010, his position was elevated to provost. Dr. Freedman chairs the conference of chief academic officers of the Association of Jesuit Colleges and Universities.



Dr. Janice Weinman Shorenstein is ED/CEO of Hadassah, the Women’s Zionist Organization of America, Inc. (HWZOA), comprised of 330,000 members, donors and supporters with nearly 900 chapters around the United States. HWZOA owns the Hadassah Medical Organization in Israel and offers programs on healthcare, leadership development and advocacy in the U.S. Previously, Weinman was President, Kids in Distressed Situations, Inc. (K.I.D.S.); Corporate VP for External Affairs, Mount Sinai-N.Y.U. Medical Center; Asst. to the U.S. Secretary of Education during the Clinton Administration, ED, the American Association of University Women, EVP, the College Board, and Chairperson, the Women’s Leadership Board, John F. Kennedy School of Government at Harvard University. She received her Masters and Doctoral degrees from the Harvard Graduate School of Education.

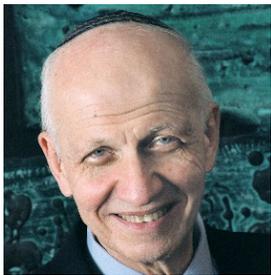


Beth Mann is VP, Institutional Advancement, of the Jewish Federations of North America. In this role, Beth is responsible for the development and implementation of a corporate and philanthropic sponsorship strategy, bringing resources and support to national programs and services, as well as local federation needs. Beth also develops articles, papers, speeches and discussions around the critical issues facing our community today. Prior to holding this position, Beth was Associate VP, FRD, overseeing all the Development Affinities which serve our communities. Beth was previously Managing Director of JFNA’s National Women’s Philanthropy, and began her career at JFNA as Director of National Young Leadership.



Nigel Savage, originally from Manchester, England, is the CEO of Hazon. Nigel founded Hazon in 2000, with a Cross-USA Jewish Environmental Bike Ride. Today Hazon has more than 60 staff across the country and plays a unique role in renewing American Jewish life and creating a healthier and more sustainable world for all. Nigel has twice been named a member of the Forward 50, and is a recipient of the Bernard Reisman Award. In 2015 he was awarded an honorary doctorate by the Jewish Theological Seminary. Before founding Hazon, Nigel was a professional fund manager in London, where he worked for NM Rothschild and was co-head of UK Equities at Govett. He has an MA in History from Georgetown, and has learned at Pardes, Yakar, and the Hebrew University.

9:30-10:15am Rabbinic Insights on Investment and Business as a Force for Good



Rabbi Irving (Yitz) Greenberg is a leading Jewish thinker and activist who has written extensively on Jewish theology after the Holocaust, the ethics of power, Jewish Christian relations, and religious and cultural pluralism. He has served in the Orthodox Rabbinates, in academia (City University of New York), and Jewish Communal Life (Founding President, CLAL: The National Jewish Center for Learning and Leadership; Founding President Jewish Life Network/Steinhardt Foundation). He is a pioneer in Holocaust education and commemoration as well as in the Jewish Christian dialogue which sought to revise theology in light of the Shoah. He has written *The Jewish Way, Living in the Image of God, For the Sake of Heaven and Earth: The New Encounter of Judaism and Christianity*, *Sage Advice: A New Commentary on Pirkei Avot*, and numerous monographs and articles.



Rabbi Julie Schonfeld is the Chief Executive Officer of the Rabbinical Assembly (RA), the international membership association of Conservative/ Masorti rabbis. Rabbi Schonfeld served on President Obama's White House Council for Faith-Based and Neighborhood Partnerships. Newsweek named her one of the 50 most influential Rabbis in America in 2011, 2012 and 2013. She was named by Jewish Women International as a "Woman to Watch" in 2011 and has also been named in the Forward 50. Rabbi Schonfeld is often called upon to represent the Jewish community in national and international settings and is known for her incisive application of Jewish thinking to world events.



Rabbi Aaron Panken, Ph.D., is President of Hebrew Union College-Jewish Institute (HUC-JIR), North America's premier institution of Jewish higher education and the center for professional leadership development of Reform Judaism. Ordained at HUC-JIR in 1991, Rabbi Panken has taught Rabbinic and Second Temple Literature at the College-Institute since 1995. His previous roles at HUC-JIR include Vice President for Strategic Initiatives as well as Dean and Dean of Students at the New York campus. He has taught for the Wexner Foundation, the Hartman Institute, and in numerous multi-denominational settings. He earned his doctorate in Hebrew and Judaic Studies at NYU, where his research focused on legal change in Rabbinic Literature. Prior to teaching at HUC-JIR, he served congregations including Congregation Rodeph Sholom in New York City and Westchester Reform Temple in Scarsdale, NY.



Rabbi Jacob Siegel oversees JLens' Jewish communal engagement and education, and assists with shareholder advocacy and interfaith investor collaborations. He has served as a dynamic educator on the topics of money, social justice, sustainability, and ethical food for Hazon, Eden Village Camp, The 92nd Street Y, Jewish Farm School, and at colleges and synagogues. Rabbi Siegel fought poverty and racism in his prior role with Americorps, and he founded a nonprofit focused on youth and violence prevention. Rabbi Siegel received his rabbinic ordination from Yeshivat Chovevei Torah, a modern Orthodox rabbinical school in New York, his undergraduate degree in Mathematics from Washington University in St. Louis, and he spent a year at Israel's Pardes Institute.

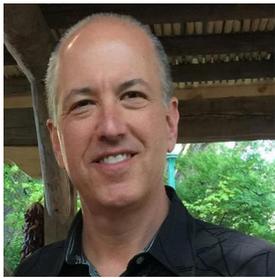
10:15-10:45am Introduction to the Impact Investing Movement



Sir Ronald Cohen is a preeminent international philanthropist, venture capitalist, private equity investor, social innovator, and vanguard of the global impact investing revolution. He was co-founder and Executive Chairman of Apax Partners Worldwide LLC, and has chaired numerous global initiatives on impact investment. Today, he is the Chairman of the Global Steering Group on Impact Investing (GSG) which followed the G8 Social Impact Investment Task Force, which he led, Chairman and co-Founder of The Portland Trust, co-founder of Social Finance UK, US, and Israel, and co-founder of Bridges Fund Management UK and US, and Bridges Ventures Israel. (via video)



Fran Seegull is the ED of the US Impact Investing Alliance. The Alliance works to increase awareness of impact investing in the US, foster deployment of and demand for impact capital across asset classes globally, and partner with stakeholders, including government, to build the impact investing ecosystem. Fran was the CIO at ImpactAssets where she headed investment management for The Giving Fund, an impact investing donor advised fund. Fran also oversaw product development and managed the Global Sustainable Agriculture and Microfinance Plus Notes. Fran has a BS in Economics from Barnard College/Columbia University and an MBA from Harvard Business School. Twitter: @franseegull



Joel Wittenberg is the vice president and chief investment officer at the Kellogg Foundation. Before this role he served as corporate vice president for treasury and investor relations at the Kellogg Company. Prior to joining the Kellogg Company, he was vice president and treasurer with Armstrong World Industries in Lancaster, Penn., and he held several key treasury roles with the Dow Chemical Company of Midland, Mich. Wittenberg earned his bachelor of science degree in accounting and finance at Michigan State University's Eli Broad Graduate School of Management and his master of business administration degree from the University of Michigan's Stephen M. Ross School of Business.



Jonathan Greenblatt is the CEO and sixth National Director of the Anti-Defamation League (ADL). A social entrepreneur, Jonathan served in the White House as Special Assistant to President Obama and Director of the Office of Social Innovation and Civic Participation and co-founded Ethos Brands which was acquired by Starbucks Coffee Company in 2005.

10:45-11am Break and Networking

11-11:45am Jewish Institutions Leading the Way



Michael Lustig retired after a 20+ year career on Wall Street, and now devotes the majority of his time and energies toward non-profit & impactful enterprises. Prior to retiring, Michael spent most of his career at BlackRock where he was a Senior Managing Director overseeing Structured Mortgage & Derivative Products trading. He has a deep involvement with UJA-Federation of NY, as Chair of i4 (Impact Investing), as well as serving on many committees and the Board of Directors. Michael is a Board Member of the Dualis Yozma Fund and GigaWatt Global, an Israel-based solar energy company that built the first large-scale grid-connected field in East Africa. Michael is currently an Adjunct Professor of Finance at NYU | Stern, teaching Debt Instruments & Markets.



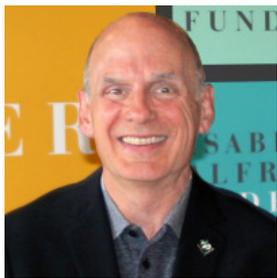
Jeremy Pearl. As EVP and CFO of the Jewish Community Foundation of San Diego, Jeremy is responsible for fiscal oversight including finance and operations, investment management and information systems. Jeremy's career has focused on tax, estate and financial planning. Prior to joining the Foundation in 2005, he spent nearly six years in KPMG's Personal Financial Planning practice. Jeremy began his legal career in estate planning in 1996. Prior to entering the legal profession, Jeremy worked for Home Federal Bank and Wells Fargo as a NASD licensed broker. Jeremy received his JD and Master of Laws in Taxation from the University of San Diego. Admitted to the Bar in 1997, he is a member of the State Bar of California.



Charlene Seidle is EVP of the Leichtag Foundation, a private independent foundation working to honor the legacy of Lee and Toni Leichtag through igniting and inspiring vibrant Jewish life, advancing self-sufficiency and stimulating social entrepreneurship in coastal North San Diego County and Jerusalem. Charlene is a frequent speaker, presenter and writer about philanthropy, Jewish community trends and social change. Charlene received the JJ Greenberg Memorial Award in 2013. She is on the board of the Jewish Funders Network, formerly served on the board of San Diego Grantmakers and has served on many committees and councils. Charlene worked for the Jewish Community Foundation of San Diego for 18 years in increasingly responsible positions, including serving as President and CEO.



Jerry Rubin is President and CEO of Jewish Vocational Service. He is responsible for the overall direction and management of the organization, and leads its Leadership Team. His responsibilities include setting and leading the strategic direction of the organization, senior staff leadership development, leading organizational innovations, leading development efforts and financial growth, outreach to external constituencies and strategic partnerships, innovations in branding and marketing, and Board relations. Prior to joining JVS, Jerry was VP of Building Economic Opportunities at Jobs For the Future, a national workforce development and education policy, research, and consulting organization. Jerry holds a Bachelor's Degree in Government from Clark University and a Masters in City Planning from MIT.



Daniel J. Bader serves as President and CEO of Bader Philanthropies. Daniel continually strives to ensure that the Foundation furthers his late mother’s dreams and aspirations. Toward that goal, he directs the foundation's collaborative and financial resources so they can best serve people in need. Daniel serves on a number of civic and educational boards and committees, in addition to serving as a board director at several technology-oriented corporations. He holds a bachelor’s degree in business administration from the Rochester Institute of Technology, and in 2006, the University of Wisconsin-Milwaukee conferred an Honorary Doctor of Humane Letters degree to him in recognition of his efforts to improve the quality of life across the state.

11:45am-12:30pm The Impact Investing Ecosystem in Israel



Vanessa Bartram. Vanessa is an impact entrepreneur turned impact investor. She is Managing Partner of ZORA, a Tel-Aviv based impact investment fund supporting Israeli entrepreneurs with scalable solutions to health, education, poverty and environmental challenges. Vanessa is Founding Board Member of LAVAN, a network of impact investors guided by Jewish learning, and launched B Lab Israel, the local affiliate of B Lab, the world’s leading movement of companies harnessing the power of business for good. In 2008, Vanessa founded WorkSquare, a Miami-based recruiting firm designed to improve financial outcomes for low-income workers. Vanessa started her career in investment banking with KPMG Corporate Finance in Mexico City. She holds an MBA from Harvard, a BA from Princeton, and is a Wexner Foundation Heritage Fellow.



Shlomi Zidky is a director and one of the founding members of Social Finance Israel (SFI). SFI is a social-financial intermediary, devoted to developing and implementing innovative social financial tools, such as Social Impact Bonds (SIBs). Shlomi began his career as a consultant and project manager for business consulting companies. Later he served as a senior consultant to the Minister of in Israel. Prior to joining SFI, Shlomi was the CEO and Co-founder of Israel's Hope, an NGO aimed to promote change in Israel's electoral and government system. Shlomi holds an M.A. in Public Policy from Tel Aviv University, an M.A. in Economics and a B.A. in Economics and Business Administration from Bar Ilan University. In addition, he works as a teaching assistant in the Public policy department at Tel Aviv University.



Eve Rubinstein is US Director of Israel Venture Network-IVN. Eve has worked in development for over 20 years, and most recently was Senior Development Officer, Major Gifts at CJP - Boston's Jewish Federation. In that position, she also served as CJP's development liaison to the Israel & Overseas Commission, working directly with donors, and staff in Israel on various initiatives including building philanthropic investment from Israelis. She studied at Brandeis University, New York University and Hebrew University, and holds degrees in Conflict Resolution, and Islamic/Middle-Eastern Studies. Eve made aliyah after college and now lives outside of Boston with her husband and two sons.



Allan Barkat established the Dualis Social Investment Fund, a nonprofit organization, in 2008. Allan, a businessman and entrepreneur, served for ten years as Managing Director of Apax Partners Israel, one of the world’s leading private equity investment groups. In the period between Apax Partners and Dualis, Allan focused on social entrepreneurship. He founded the Dualis Social Investment Fund to provide support and guidance for businesses that share the vision that social entrepreneurs can be encouraged to build social businesses on a for-profit basis. In recognition of his contributions to the advancement of the social business sector, Allan received the 2017 Midot Social Action Award. Allan has a B.Sc in Computer Science from the Technion, and an MBA from the international Kellogg-Recanati Program.



Cecile Biliouis is the Founder and Managing Partner at Impact First Investments, Israel’s first impact venture fund. Cecile specializes in merging technology, profit and social impact and is a pioneer of the impact investing industry in Israel. Prior to founding Impact First, Cecile managed the Noaber Foundation’s Israeli investments for over 14 years, and has extensive hands-on management experience with high-tech start-ups. She was one of the initiators of the Al-Bawader private equity fund, established to invest in businesses in the Arab community in Israel. Prior to her professional career, Cecile served as an intelligence officer in the Israel Defense Forces. Cecile studied at the Hebrew University of Jerusalem.



Calanit Valfer is Managing Partner and co-founder of the Elah Fund, a growth capital impact fund investing in high potential, medium sized, export oriented, low- and mid-tech companies in Israel's Negev and Galilee regions. The Elah Fund's expert team, access to superior deal flow and disciplined investment strategy aims to maximize financial returns to investors as well as generate measurable ESG improvements and positive impact for Israel.



Dalia Black is an advisor to foundations, federations and families who seek to create and implement social impact investment strategies in Israel. Dalia's clients include the UJIA, UK's largest Jewish charity supporting Israel, whose Si3 initiative leverages impact investments in Israel to increase Israel engagement and scale of impact. Dalia built her career in the financial sector having been Vice President at the Delek Group, a TA25 listed company. Previously, Dalia managed investments and fund raising at Viola Credit, Israel's largest venture lending fund, and was a Management Consultant for Accenture based in London. In a voluntary capacity, Dalia is the co-founder of a Tel Aviv NGO that established a school promoting Jewish studies in a pluralist environment for religious and secular children.



Yosef I. Abramowitz, an American-Israeli human rights activist, educator and entrepreneur is recognized as one of the pioneers of the solar energy industry in both Israel and East Africa. Named by CNN as one of the six top global "Green Pioneers," by PV Tech as "one of the most inspiring solar CEOs" worldwide, and as Person of the Year by the Israel National Business and Energy Conference, Abramowitz is co-founder of the Arava Power Company, Israel's leading solar developer. Nominated three times for the Nobel Peace Prize, Abramowitz heads Energiya Global Capital, an impact investment platform that provides healthy returns to investors while advancing the environmental and humanitarian goals of providing affordable green power to underserved populations as a fundamental human right.

12:30-1:10pm Lunch and Mincha

1:10-1:50 BDS in the Responsible Investing/Business Arena



Itai Nixon is the director of economic affairs at the Ministry of Strategic Affairs and Public Diplomacy. Prior to his work in the Ministry, Itai worked as an economic consultant. Itai received his bachelor's degree from The Integrative Program: Philosophy, Economics, Political Science (PEP) at The Hebrew University of Jerusalem, and his Masters in Public Policy from Georgetown Public Policy Institute (today the McCourt School of Public Policy at Georgetown University). Itai lives with his family in Jerusalem.



Ethan Felson is Executive Director of the Israel Action Network, a strategic initiative of the Jewish Federations of North America to build a broad base of support for Israel and to counter anti-Israel activity. An attorney, activist and interfaith leader, he founded Interfaith Partners for Peace which brings rabbis and ministers together to support two states for two peoples. Ethan is the author of chapters in several books and wrote the national affairs article for the American Jewish Yearbook from 2006 through 2015. He and his husband Daniel reside in New York City with their twins Hannah and Seth.



Anne Herzberg is the Legal Advisor of NGO Monitor. She is a graduate of Oberlin College and Columbia University Law School. Prior to joining NGO Monitor, she worked as an attorney in New York. Her areas of research include business and human rights, international human rights law, the laws of armed conflict, universal jurisdiction, international fact finding, NGOs, and the UN. She is the author of the widely cited "NGO Lawfare: Exploitation of Courts in the Arab-Israeli Conflict," co-author of Best Practices for Human Rights and Humanitarian NGO Fact-finding, and co-editor of "The Goldstone Report 'Reconsidered': A Critical Analysis" and Filling in the Blanks: Documenting Missing Dimensions in UN NGO Investigations of the Gaza Conflict. Anne's articles and op-eds have appeared in many publications, including the American Journal of International Law, Ha'aretz, the Jerusalem Post, YnetNews, and The Wall Street Journal.



Momo Mahadav serves as CEO of Maala – Business for Social Responsibility, Israel’s leading advocate for CSR and good corporate citizenship. Momo is a key player in the Israeli CSR arena and has a proven track record of leading value and behavioral based change processes within the business, public and social spheres. Momo joined Maala in early 2006 as VP, and was appointed CEO in 2009. Momo was previously Director of SPNI Tel Aviv Center for Environmental Action. He also served as Board Member of the Association of Civil Rights in Israel during 2011-2015. Momo holds a master’s degree in Public Policy and a B.A. in Social Work, both from Tel Aviv University. He lives with his wife in Tel Aviv.

1:50-2:30pm Shareholder Advocacy on Jewish Environmental and Social Issues



Rabbi Joshua Ratner oversees JLens’ advocacy in the corporate and investment arena on social, environmental, and Israel-related concerns. He previously served as the director of the Jewish Community Relations Council in Connecticut, the Associate Rabbi at Yale University, and the Rabbi at Congregation Kol Ami. Rabbi Ratner is a board member of the Jewish sustainability organization Hazon, a Global Justice Fellow with American Jewish World Service, and a Rabbinic Fellow of CLAL’s Rabbis Without Borders program. His writings about the interplay between Judaism and contemporary topics have been featured on Huffington Post, myjewishlearning.com, and other periodicals. Rabbi Ratner was ordained by the Jewish Theological Seminary, and is a graduate of Columbia University and Columbia Law School. He was a corporate attorney before entering rabbinical school.



Laura Campos. As director of the Nathan Cummings Foundation's Corporate & Political Accountability program, Laura employs both grant making and active ownership strategies to address the ways in which corporations can both advance and hinder progress on climate change and inequality. In her prior role as the Director of Shareholder Activities at the Foundation, Laura successfully engaged public corporations on topics ranging from climate change to corporate governance. She is active in numerous outside groups and shareholder coalitions focusing on responsible investment practices including the Investor Network on Climate Risk and the United Nations backed Principles for Responsible Investment. Laura’s work has been covered by numerous publications and her writing has appeared in The New York Times, The Chronicle of Philanthropy and The International Business Times.



Ophir Bruck is a US Network Manager at the Principles for Responsible Investment (PRI), the world’s leading proponent of responsible investment. With a global network of more than 1800 institutional investors and service providers collectively managing over \$70 trillion in assets, the PRI works to understand the investment implications of environmental, social and governance (ESG) factors and to support its signatories in incorporating these factors into investment and ownership decisions. Ophir leads the PRI’s network and initiatives in the western United States. Prior to joining the PRI, Ophir was an analyst at the University of California Office of the Chief Investment Officer, where he co-led the development and implementation of a responsible investment framework for the university system’s endowment, pension and working capital assets.



Rachel Cohen oversees JLens' social and environmental research. Previously she worked in ESG (Environment, Social, Governance) Consulting at MSCI. She has led several large-scale projects on environmental and social risks and opportunities, as well as adherence to globally accepted ethical standards. Her areas of expertise include access to medicine, bioethics, supply chain risk assessment, environmental risk analysis, and product safety. Prior to MSCI, Rachel spent two years as a corporate sustainability consultant. She began her career as a Jewish professional at the OSU Hillel. Rachel lived in Sde Boqer, Israel for two years earning an M.A. in Middle East Studies from Ben-Gurion University. She holds a M.A. in Public Policy & Philosophy with a concentration in Public Health from George Washington University, and a B.A. in Political Science from the Ohio State University with a minor in Jewish Studies from Hebrew University in Jerusalem.

2:30-3pm Break and Networking

3-3:40pm Multi-Faith Collaboration and the UN Sustainable Development Goals



Michael Even is an advisor to the Alliance for Religions and Conservation which recently convened 30 different faith traditions from 8 religions for the Faith In Finance Summit in Switzerland. The Summit launched a global movement aimed at shifting billions of dollars of faith-based investments into initiatives that support the United Nations' Sustainable Development Goals. Mike is an investment professional with over 35 years of industry experience. Previously Mike was the Chairman of Man Numeric Investors, and the global CIO and Co-Head of Citigroup Asset Management. Mike received a Bachelor of Arts degree in economics, a Bachelor of Science degree in operations research from Cornell University and a MBA from MIT.



Dr. Patricia M. Dinneen, Ph.D., serves as a Senior Advisor at Emerging Markets Private Equity Association. She is on the Board of Directors of Catholic Relief Services, and helped to organize the Vatican Impact Investing Conference in 2014 and 2016. Pat is on the founding Steering Committee of the Catholic Impact Investing Collaborative, an organization dedicated to advancing impact investing among Catholic institutions.



Dr. Rajwant Singh represented the Sikh community at the Faith In Finance Summit. He is the founder and President of EcoSikh. Dr. Singh is also the Chairman of the Sikh Council on Religion and Education (SCORE), Communications Director of the Sikh Human Development Foundation, and Secretary of the Guru Gobind Singh Foundation in Maryland. In the past, Dr. Singh has also held the presidency of the Interfaith Conference of Metropolitan Washington, where he convened faith communities in DC for joint discussions. Dr. Singh currently resides in the Washington, DC Metro Area with his wife and two children.



Stone Conroy works with the International Peace and Security Institute. Previously he worked with the Alliance for Peacebuilding and ran the Innovative Financing for Peace initiative, which explores new financing vehicles and business models for sustainable investment in peace. He was part of the Outreach and Engagement team at the U.S. Department of State's Overseas Security Advisory Council (OSAC), where he promoted security cooperation and information sharing between the State Department and private sector organizations. Stone was a Boren Fellow in Nigeria as a Conflict Management and Economic Development Fellow at Mercy Corps, and worked on peacebuilding and economic empowerment programs in the Middle Belt region. Stone holds a Master's Degree in Conflict Resolution from Georgetown University.



Fletcher Harper, an Episcopal priest, is ED of GreenFaith, an international interfaith environmental organization. He has developed a range of innovative programs to make GreenFaith a global leader in the religious-environmental movement. In the past four years, he coordinated the 2015 OurVoices campaign mobilizing religious support globally for COP 21, led organizing of faith communities for the People's Climate Marches, helped lead the faith-based fossil fuel divestment movement, supported the launch of the global Interfaith Rainforest Initiative, and co-founded Shine, a faith-philanthropy- NGO campaign to end energy poverty with renewable energy by 2030. He helps lead GreenFaith's new local organizing initiative, creating multi-faith GreenFaith Circles in local communities globally.

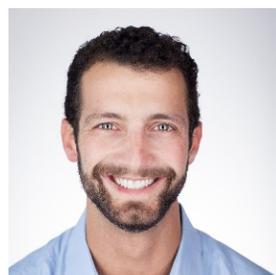
3:40-4:20pm Engaging Younger Generations With Values-Based Investing



Rachel Gerrol is recognized internationally for her work on millennial philanthropy. She is Co-Founder of NEXUS, a leading network of next gen philanthropists and impact investors with members from over 70 countries. Rachel has organized over 35 summits for NEXUS with partners including the UN, The White House, No. 10 Downing Street and the First Lady's Office in Australia. Rachel Chaired the 2013 G8 Young Summit, was named a "Top 99 Foreign Policy Leader Under 33" by the Diplomatic Courier, is on the Speaker's Bureau and National Young Leadership Cabinet of JFNA, has testified before the Knesset, is a Wexner Heritage Fellow, and on the Board of the Birthright Israel Foundation and the Next Gen Council of the USC Shoah Foundation. She is a Term Member of the Council on Foreign Relations.



Dan Rueven manages all wealth management, trading, portfolio, and risk-related activities of Kinneret Group, an asset advisory firm. Mr. Rueven has had careers in high frequency trading on Wall Street and in internet entrepreneurship. Previously, he was a program and electronic trader at Nomura Securities, where he helped construct portfolio theory and trading/algorithm strategy. Throughout the last 10 years, he has consulted in the fields of e-commerce, internet business development, equity/derivative trading strategy, and financial literacy. He sits on several non-profit boards, is the treasurer of his building in NYC and advises companies, foundations, and individuals on various aspects of investments and strategy. Dan attended Brandeis University, where he was a member of the Phi Alpha Theta History Honors Society, and graduated with degrees in international and global studies and history, with a business concentration.



Avi Deutsch is the Co-founder and CEO of LAVAN, a growing community of impact investors guided by Jewish learning to effect positive social and environmental change through intentional financial decisions. He is the former Business Development Manager at Boundless Impact Investing, a market intelligence platform for impact investors. Prior to that he spent a year working in Rwanda with at-risk, orphaned youth. Avi has worked at the Bank of Israel and served as an officer in the Armored Corps of the Israel Defense Forces, commanding soldiers in training and combat. He holds a B.A. in Philosophy, Political Science, and Economics from the Hebrew University of Jerusalem, and is currently getting his MBA from the Wharton School of the University of Pennsylvania.



Dr. Rebecca Trobe, Psy.D, founder of Impact Coaching & Consulting, LLC, focused on multi-generational strategic philanthropy and wealth succession planning with an emphasis on stewardship, legacy planning and the successful emergence and transition of the next generation. In addition to families, Rebecca works with organizations, and leaders on the effective development of strategy, values, vision and leadership. Rebecca is based in the San Francisco Bay Area and is privileged to travel nationally and internationally in her work with organizations, foundations and families. She is passionate about most things involving the principles of social venture, philanthropy, altruism and leadership and has proudly served on the advisory boards of both Ashoka's Bay Area Youth Venture and Thinking Beyond Borders.

4:20-4:30pm Closing Remarks

4:30-5:30pm Cocktail Reception