

Investors Meet MDI and CDFI Banks
9:00 am – 10:30 am

Moderator:

Mary Tingerthal
President, Capital Markets Company, Housing Partnership Network
Trustee, National Community Investment Fund

Panelists:

Scott Budde
Managing Director, Global Social & Community Investing, TIAA-CREF

Brian Handal
Division Senior Vice President, Institutional Lending, Wells Fargo

Mark Regier
Director of Stewardship Investing, Mennonite Mutual Aid (MMA)

Sr. Pam Buganski
Provincial Treasurer, Sisters of Notre Dame

November 5, 2009

www.ncif.org

Sisters of Notre Dame



*Sisters of Notre Dame General Chapter
Statement 2004 (excerpts)*

- *To nurture communities of nonviolence*
- *To renew our ... outreach, empowering persons who are poor and marginalized, especially women and children*
- *To network ... with others for justice and peace*
- *To reverence creation ... restore its balance*

Sisters of Notre Dame

Tim Smith of Walden

Donna Katzin of Shared Interest

Lauren Compere of Boston Common Asset

Dawn Edwards of AltruShare

Luther Ragin of F. B. Heron Foundation

Trish Kelley of UBS in Cleveland, OH

Saurabh Narain, NCIF

How to Engage #1

Help religious communities to recognize their readiness and engage them in conversation where they are.

Use a *different* resource to serve the people.

Engage the Social Justice Committee, youngest members.

Educate board and investment committees.

Develop measurement tools for ESG.

Look for merged communities.

How to Engage #2

Leverage the mission of the faith-based group.

What is their mission? How can you help them promote that mission within their own portfolio and within the portfolios of other clients?

Are you willing to be and can you influence?

How to Engage #3

Hold socially responsible Mutual Funds

Join 1% or More for Community Campaign

Incorporate stock in companies for shareholder advocacy on issues to which the faith-based group has a special commitment.

How to Engage #4

Include Positive Managers in the portfolio

Walden

Boston Common Asset

Model on F. B. Heron Foundation

Program-related investments

Market-related investments

How to Engage #5

Add positive managers using F. B. Heron Foundation Continuum model and ESG reporting.

Spread responsible investment to the international SND community.

Use of AltruShare as broker.

Teach high school students.

Support conferences on Community Investment.

Resources

www.snd1.org

patricia.kelley@ubs.com

www.forwardci.org (November 19, 2009 conference, Madison, WI)

www.microplace.com

www.sharedinterest.org

www.hopecu.org

www.promujer.org

www.fonkoze.org

www.crfusa.com

www.altrushare.com (Brokerage)

www.capitalforcommunities.org (NICA Fund)

www.endowmentethics.org (REC)

www.fbheron.org