



The Climate is in Crisis: What Can Investors Do?



Seventh Generation Interfaith
Coalition for Responsible Investment

2024 Conference

15 October 2024

Welcome to the 2024 SGI Conference



Welcome, members and friends of SGI!

Due to current events, I have rewritten this note too many times. My first draft began by noting that 2023 was the hottest year on record, marked by extreme weather that devastated communities and upended daily lives around the globe. Then Hurricane Helene arrived, followed by Hurricane Milton, before I could hit “save.”

At the recent ICCR conference, we heard a direct, five-part analysis of the climate crisis: “It’s Warming; It’s Us; We’re Sure; It’s Bad; We Can Fix It.” The first four are certainties, and I am trying to be hopeful about the fifth.

We see how deadly and expensive climate change is around the world. There are no havens from the risks to food and water security, from forced migration and geo-political conflict, and from inequality, poverty, and global health risks. These are financially material issues. They already impact our investments and will affect financial and economic systems broadly. Investors who are not paying attention to these issues expose their portfolios to significant risk. Companies committed to addressing their impacts on society and the environment are better positioned for financial success over the long term. We need dependable companies to lead, those that recognize and act on the need to transition in the short term so that they can last in the long term.

A problem as big as climate risk requires a response from all of us, so faith-based investors join with other investors to address climate risk. While we often collaborate in investor spaces around strategies meant to catalyze corporate progress to address the climate crisis and other critical challenges, we make independent investment decisions, grounded in our deepest beliefs, to provide risk-adjusted returns to our individual constituents and beneficiaries.

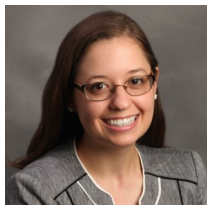
We thank our sponsors for their generous financial support enabling us to continue our work. Our Board of Directors merit special thanks for their guidance and commitment to our mission. Congratulations to Sr. Gwen Farry, B.V.M., who receives tonight the Fr. Mike Crosby Award. She inspires leadership toward a more just and sustainable world. As well, we thank Natalie Wasek, our Associate Director, and Christina Dorett, our Shareholder Advocacy Manager.

Decades from now, I hope that those who follow us will remember this time as a critical turning point in choosing a livable future — a time that demonstrated a renewed commitment to and understanding of the challenges at hand and how made choices that benefit both people and the planet.

In hope,

Christopher Cox

Welcome from the SGI Board President



Dear SGI members and friends,

Welcome to Seventh Generation Interfaith Coalition for Responsible Investment's 2024 Annual Conference! We look forward to being with everyone, both in-person and virtually, to celebrate SGI's ongoing work to live out our mission:

Through the lens of faith and the promotion of human rights, Seventh Generation Interfaith Coalition for Responsible Investment builds a more just and sustainable world for those most vulnerable by integrating social and environmental values into corporate and investor actions.

That commitment to building a more just and sustainable world feels ever more relevant and pressing as we continue to witness the devastating impacts of climate change. From massive wildfires in Canada, to record-setting heat this year, and the recent catastrophic damage from Hurricane Helene in much of the Southeastern U.S., increasingly destructive and deadly impacts from a changing climate are becoming the new norm. This year's conference theme is **The Climate is in Crisis: What Can Investors Do?** This event will bring together experts to provide an overview of the climate crisis and the burden on people and communities and explore the role that investors can play in addressing these impacts.

Please join me in congratulating Sr. Gwen Farry, B.V.M. as the recipient of the 2024 Fr. Mike Crosby Award. Sr. Gwen's over 70 years of life in ministry with the Sisters of Charity of the Blessed Virgin Mary has spanned teaching primary school, serving as Chaplain in the healthcare system, and representing the BVMs in corporate responsibility. Sr. Gwen has been a long-time advocate for peace and justice and her years of service encapsulate the spirit of the Fr. Mike Crosby award to promote a more just and sustainable world.

We owe tremendous gratitude to Chris, Natalie, and Christina for continuing to foster Fr. Mike Crosby's work and carrying forward the mission of SGI. We offer our sincere appreciation to our sponsors for their support of our collective work. And, finally, we thank the SGI Board and Members for volunteering their time and expertise, and for their commitment to the care for all people and our planet, to ensure prosperity for all.

Kindest regards,

Caroline Boden

SGI Board President

Today's Program

- Welcome** Natalie Wasek
Associate Director, SGI
Caroline Boden
Board President, SGI
- Reflection** Sr. Pegge Boehm, PBVM

Keynote Address

- Keynote** Christina Herman
Senior Director for Climate Change & Environmental Justice, Interfaith Center on Corporate Responsibility

Impacted Stakeholder Panel Discussion

- Panelists** Tom Content, Executive Director, Citizens Utility Board of Wisconsin
Bryan Rogers, Environmental Justice Director, Walnut Way
Trasus Wright, Lindsa Heights resident

Investors Panel Discussion

- Panelists** Tyler Zibrowski, Director of Finance, Franciscan Sisters of Perpetual Adoration

Mary Beth Gallagherv, Director of Engagment, Domini Impact Investments, L.L.C.

Brett Korte, Staff Attorney, Clean WI

Presentation of the Fr. Mike Crosby Award

- Presenter** Christopher Cox
Executive Director, SGI
- Recipient** Sr. Gwen Farry, BVM
Sisters of Charity of the Blessed Virgin Mary

Keynote:

Christina Herman is the Senior Director for Climate Change & Environmental Justice at the [Interfaith Center on Corporate Responsibility](#). She has thirty years of experience with non-governmental and faith-based advocacy organizations on human rights, sustainable development and corporate engagement on sustainability and equity issues.

Christina manages a team at ICCR that works with investors to encourage a Just Transition to a clean energy economy, enhanced methane management and disclosure across the natural gas supply chain, adoption by companies of science-based targets for GHG emissions reductions, financial sector decarbonization, and alignment by companies of their climate lobbying and trade association memberships with the goals of the Paris Agreement.

Prior to joining ICCR staff, Christina engaged in shareholder advocacy with Fortune 500 corporations on a range of environmental and health equity issues. She began her career on human rights and sustainable development issues as a Mennonite Central Committee volunteer in the Philippines. In subsequent years, she advocated on human rights and international debt, trade and development issues in Washington, DC, where she lives with her family. Christina is active in St. Mark's Episcopal Church on Capitol Hill and holds an M.A. from the University of Oxford.



CAPUCHIN FRANCISCAN PROVINCE OF ST. JOSEPH

The Midwest Capuchins

Panelists:



Tom Content is the Executive Director of the [Citizens Utility Board of Wisconsin](#), the nonprofit non-partisan consumer advocate for Wisconsin utility customers -- homeowners, renters and small businesses across the state. Tom joined the Citizens Utility Board in 2017 after working for 30 years as a journalist, including 20 years tracking the Wisconsin energy and utilities sector while reporting in Milwaukee and Green Bay. In 2007, he won the National Press Foundation Stokes Award for top energy writing in the country for a series of articles about energy and climate change issues facing Wisconsin for the Milwaukee Journal Sentinel. Since coming to CUB Tom has led the CUB team's work to make sure that the Citizens Utility Board, now in its 45th year, is actively working on customers' behalf for decades to come. Tom currently serves as vice president of the National Association of State Utility Consumer Advocates. He is an at large member of the board of SGI-CRI.



Bryan Rogers is the Director of Environmental Justice at [Walnut Way](#). He is also a University of Wisconsin Madison, graduate student in the school of Sustainable Peace Building. Prior to being the EJ (Environmental Justice) Director, Bryan has worked as a community organizer and program coordinator for Walnut Way since September of 2022.

Bryan work was instrumental in the 2022 We Energies rate case, WI PSC (Public Service Commission) energy burden workshops and preplanning efforts toward the creation of the Alternative Payment Program, Percentage of Income Payment Program pilot being implemented during FY 2023.



Tyler Zibrowski, Director of Finance for the [Franciscan Sisters of Perpetual Adoration](#), is a father of 3 and has been married 10 years to his beautiful wife Ashley. He is a native of the La Crosse, WI area and currently lives there with his family. He enjoys trout fishing and hunting in the driftless region, along with spending time with his family hiking state parks and playing outside with his children. He serves as the Director of Finance with the Franciscan Sisters of

Perpetual Adoration after spending 10 years in corporate finance and accounting, and is a UW-La Crosse and Viterbo University alum.



Mary Beth Gallagher is the Director of Engagement at [Domini Impact Investments LLC](#), a women-led SEC-registered investment adviser that harnesses the power of finance to help create a better world. With an exclusive focus on impact investing, Domini aims to help drive positive outcomes for our planet and its people, while seeking competitive financial returns.

Ms. Gallagher leads Domini's engagement efforts with portfolio companies, broader stakeholder groups and policy makers, oversees the firm's Proxy Voting, as well as developing initiatives and campaigns in areas such as human rights, climate change mitigation, biodiversity, health, and racial justice. Ms. Gallagher represents Domini on the U.S. State Department Advisory Committee on Responsible Business Conduct, Finance for Biodiversity Foundation Advisory Board and the Steering Group of Nature Action 100. Ms. Gallagher is an attorney and has been advancing social justice and human rights issues for most of her professional career. Prior to joining Domini in 2021, she was the Executive Director of the non-profit organization Investor Advocates for Social Justice, where she represented faith-based institutional investors in stewardship and shareholder advocacy. Ms. Gallagher holds a B.S. in environmental science from Boston College and a J.D. from American University Washington College of Law. She is a Member of the New York Bar, admitted in 2009. She was a Peace Corps Volunteer in Benin, West Africa.



Brett Korte, Staff Attorney with [Clean WI](#), focuses on air, climate, and energy issues before state agencies and in court. He works closely with our policy and science experts to advocate for healthy air, climate mitigation, and a just transition to renewable energy.

Previously, Brett was a Staff Attorney and department head at the Environmental Law Institute in Washington, D.C., and most recently, a Clinical Fellow at the University of California, Irvine School of Law Environmental Law Clinic. At UCI, Brett both supervised student attorneys and directly represented clients, primarily on public land and environmental justice issues. Brett holds a B.A. in History from the University of Illinois at Urbana-Champaign, and a J.D. and Certificate of Specialization in Environmental Law from Tulane University. He is licensed to practice law in Wisconsin, California (inactive), the District of Columbia, and Missouri.

Fr. Mike Crosby Award: Sr. Gwen Farry, BVM



Gwen (Leontia) Farry, BVM has dedicated her life to social justice, education, and pastoral care. Born on May 13, 1935, in Los Angeles to Irish parents Leo and Marie Harrington Farry, Gwen grew to follow in her parents' footsteps in social justice and education. Her father was politically involved in Ireland as were his mother and brothers, while her mother was a dedicated teacher.

After attending Catholic grade and high schools, Gwen entered the [Sisters of Charity of the Blessed Virgin Mary](#) in 1953. Her early career

included teaching primary grades in Arizona and in Southern California, where she later served as an elementary school principal.

In 1982, Gwen completed a master's degree in pastoral ministry and clinical pastoral education. She spent the next twenty years as a chaplain or in pastoral care in various healthcare settings.

On behalf of the Sisters of Charity, BVM, Gwen became the BVM representative at the Eighth Day Center for Justice in 2004, where she focused on corporate responsibility issues. As a member of the BVM Shareholder Education/Advocacy (SEA) group, she educated the BVM community about corporate accountability. Between 2004 and 2015, Gwen led and/or co-filed numerous shareholder resolutions and attended Annual General Meetings with BVMS and members of the Interfaith Center on Corporate Responsibility (ICCR), where she engaged directly with company boards and shareholders.

Among her notable achievements, Gwen played a key role in advancing human rights resolutions with a company that worked internationally. As its policy, the company only stated, "We observe the human rights policies in the countries in which we operate." After Gwen's filing of a resolution over several years, the company produced a robust human rights policy that included UN guiding principles and International Labor Organization rights.

Additionally, she successfully encouraged a fast-food company, which had no water use policy, to publish its first policy and continue regular sustainability reports after agreeing to withdraw her resolution. Her advocacy also led food and beverage companies to decrease sugar, salt, and fat in children's meals. During the implementation of the Affordable Care Act, Gwen urged pharmaceutical and health insurance companies to support the legislation. Most recently, she advocated for minimum wage plus tips for tipped workers.



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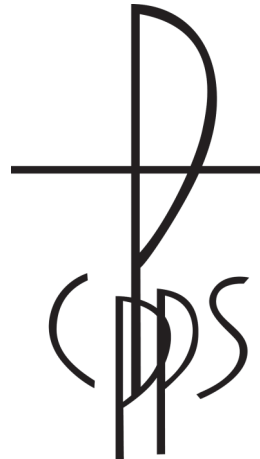
The causes that inspire you are as unique as the life you lead. We all live and give differently, but the support of the right financial partner has the power to multiply generosity. It's our privilege to help people make an impact – and to make our own.

**Heitner Mesker Wealth of Raymond James is proud to support
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Jonathan M. Heitner & David Mesker

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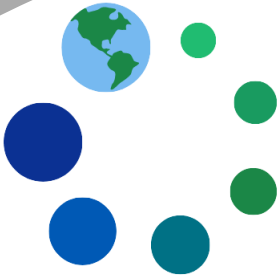
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