

Value Creation Beyond the Income Statement: What to Consider with ESG Reporting

Investor focus is expanding beyond “what” value was created to “how” value was created. This change fuels measurement and reporting trends of environmental, social and governance (ESG) metrics, but its evolution is just beginning. Join our discussion where our panel sheds light on what to consider with ESG reporting.



- What is driving the change to show “how” value is created?
- How do the Sustainability Accounting Standards Board (SASB) standards address the trend by showing value creation?
- How do companies transition to this type of reporting (all at once, small steps or something in between)?
- What risks exist with this type of incremental disclosure, and how can a company address those risks?



Brad Pogalz

Director of Investor Relations and Corporate Communications
DONALDSON COMPANY

Brad is director of Investor Relations and Corporate Communications at Donaldson. He joined Donaldson after an extensive career in finance and operations with prominent retailers, including Target and Macy's. At Donaldson, Brad is responsible for the company's investor relations program, including developing earnings release materials and conference call scripts, executing a robust outreach program, and maintaining relationships with buy- and sell-side analysts. In addition, Brad currently sits on the Board of Directors of Venture Academy, where he serves in the role of Board Treasurer. Brad holds a B.A. in Finance from the University of St. Thomas and a MBA from the Carlson School of Management at the University of Minnesota.



David S. Post, CFA

Director of Research
SASB

David leads SASB's Research Team, which includes sector analysts, a technical director, and a stakeholder outreach manager. The Research Team—in conjunction with oversight by the Standards Board—identifies and researches financially material, industry-specific sustainability risks and opportunities in consultation with companies, investors, and subject matter experts. The team's rigorous and transparent process has produced a set of 77 industry-specific standards—including topics and associated metrics—that are designed to be low cost to companies, and enable investors and companies to make effective capital allocation decisions. David holds a BS in Applied Economics and Management from Cornell University, an MBA in Finance from Columbia University, and is a Chartered Financial Analyst.



Amy Seidel

Partner
FAEGRE BAKER DANIELS LLP

Amy advises public companies on SEC reporting requirements, stock exchange listing standards, executive compensation issues, disclosure issues and general corporate governance matters. She also has experience in many areas of corporate representation, including public and private securities offerings, mergers and acquisitions, and general corporate counseling. Amy is on the board of advisors of the University of Minnesota Law School and on the Advisory Board of thecorporatocounsel.net. Amy has been named in Chambers USA among America's Leading Lawyers for Business (Corporate/M&A) each year since 2006.



Jessica L. Mann, CFA

Head of ESG
WELLS FARGO ASSET MANAGEMENT

Jessica is head of Environmental, Social and Governance (ESG) investing for Wells Fargo Asset Management. Before this, she oversaw institutional marketing for Wells Capital Management for 14 years. Prior to that, she was head of standard setting at the CFA Institute for three years. The first decade of her career was in investment consulting, with Mercer Investment Consulting in Richmond, VA, and then London, and then with Watson Wyatt Partners in the UK. She is a graduate of the University of Virginia with a bachelor's degree in mathematics and a minor in economics. Jessica is a member of the CFA Institute, is on the Board of Directors of the CFA Society of San Francisco, and is a Fellow in the CFA Society of the UK.

LOEWS MINNEAPOLIS HOTEL

601 First Ave N
Minneapolis, MN 55403

11:30 AM – 1:00 PM

REGISTRATION: 11:30

LUNCH/PROGRAM: Noon – 1:00

COST

Members: free

Non-members: \$45

Payment accepted at the door.

QUESTIONS

Contact Jane Cracraft at
612-376-7979 or email

jane.cracraft@businesswire.com

PLEASE RSVP BY

SEPT. 14, 2018

WE APPRECIATE THE SUPPORT OF THESE GENEROUS SPONSORS:

