



First
Affirmative
Financial
Network, LLC



Social Investment Forum



NEWS ADVISORY

2009 SRI Service Award Winners Announced

Calvert's Reggie Stanley and industry pioneer, Robert Zevin, take top honors at 20th Anniversary SRI in the Rockies Conference

COLORADO SPRINGS, CO—November 3, 2009—SRI in the Rockies, the largest and longest-running sustainable and responsible investing conference in the world, has announced that Reginald Stanley, Senior Vice President and Chief Marketing Officer at Calvert Investments, and Robert Zevin, founder of Robert Brooke Zevin Associates and one of the godfathers of socially responsible investing, were selected as co-winners of the 2009 SRI Service Award.

The annual SRI Service Award recognizes outstanding contributions to the socially responsible investment industry. Winners are selected based on a number of criteria, including leadership within the sustainable and responsible investment industry; significant innovations in SRI investing, communication and cooperation with other professionals in the industry, and success in improving the public's awareness and acceptance of SRI. The SRI Service Award is presented at the [SRI in the Rockies Conference](#) which is produced by First Affirmative Financial Network in collaboration with the Social Investment Forum.

“It is an exciting time of growth and opportunity for responsible investing,” said Steve Schueth, President of First Affirmative Financial Network, producer of SRI in the Rockies. “These service award winners shine the light on our roots and point the way to a future that reflects our vision for a better world.”

About the Winners

Reggie Stanley has integrated financial and mission-based initiatives throughout his twenty-five years of investment, economic development, and entrepreneurial experiences. He is a current Director of the Social Investment Forum and has been active in establishing the industry's “CEO Summits” and a variety of other high-impact initiatives. For the past nine years, Mr. Stanley has led the marketing and product development initiatives for [Calvert Investments](#), helping to champion and support advisor, fiduciary, and investor interest in sustainable investing. He also served as President of Boston Community Managed Assets and has held several leadership positions at Fidelity Investments, Bain & Company and McKinsey & Company. He has served on numerous community and non-profit boards, including Echoing Green, Calvert Foundation, Gay and Lesbian Advocates Defenders, and Greater DC Cares. A recent Fellow of the Southern Africa/United States Center for Leadership and Public Values, he earned his MBA and BA at the Wharton School, University of Pennsylvania.

Robert Zevin has been a leader in socially responsible investing since 1967 and pioneered the use of modern portfolio theory. He started what is now Walden Asset Management in 1975, making it the first explicit socially responsible investment unit in any bank. He was also a principal architect of the first Calvert Social Investment Fund in 1982. Mr. Zevin was a leader in the movement to divest from apartheid South Africa and has founded, co-founded, and led numerous social change organizations including Resist (against the war in Vietnam), United States Servicemen's Fund (anti-war GI coffee houses), Haymarket Foundation (change not charity), Affirmative Investments (direct community

investments), and Shared Interest (support for informal economy in South Africa). A Harvard PhD in economics, Mr. Zevin has taught at Berkeley, Columbia, and Harvard and published two books and numerous articles about economic history and social policy. For almost a dozen years he has been leading and building [Robert Brooke Zevin Associates](#).

Stanley and Zevin join a prestigious group of industry leaders who have won the annual SRI Service Award over the years, including:

- 2008: Bob Walker, The Ethical Funds Company
- 2007: Conrad MacKerron, As You Sow Foundation
- 2006: Mark Regier, MMA Praxis
- 2005: Shelley Alpern, Trillium Asset Management
- 2004: Anita Green, Pax World Funds
- 2003: Peter Camejo, Progressive Asset Management/Financial West Group
- 2002: Michelle Chan, Friends of the Earth
- 2001: Steve Lydenberg, Domini Social Investments
- 2000: Frank Coleman, Christian Brothers Investment Services
- 1999: Lloyd Kurtz, Nelson Capital Management
- 1998: Steve Schueth, First Affirmative Financial Network
- 1997: George Gay, First Affirmative Financial Network
- 1996: Amy Domini, Domini Social Investments
- 1995: Jerome Dodson, Parnassus Investments and Alisa Gravitz, Green America (co-winners)
- 1994: Tim Smith, Walden Asset Management
- 1993: Joan Bavaria, Trillium Asset Management / CERES
- 1992: Peter Kinder, KLD Research & Analytics
- 1991: Ed Winslow, Progressive Asset Management/Financial West Group

About First Affirmative

First Affirmative Financial Network, LLC (<http://www.firstaffirmative.com>) is an independent fee-only Registered Investment Advisor (SEC File #801-56587). First Affirmative specializes in socially responsible, sustainable, and transformative investment management and consulting, and supports a nationwide network of investment professionals who specialize in serving socially conscious investors. First Affirmative produces the annual SRI in the Rockies Conference (<http://www.SRIintheRockies.com>), the premier conference for the sustainable and responsible investment industry in North America.

About the Social Investment Forum

The Social Investment Forum (<http://www.socialinvest.org>) is the U.S. membership association dedicated to advancing the concept, practice, and growth of socially and environmentally responsible investing. SIF members integrate economic, environmental, social, and governance factors into their investment decisions. SIF membership includes social investment practitioners and institutions, including financial professionals, analysts, portfolio managers, banks, mutual funds, researchers, foundations, community development organizations, and public educators. More information about the Forum, including the 2007 Report on Socially Responsible Investing Trends in the United States, is available on the SIF website.

Media Questions

Mo Shafroth for First Affirmative and SRI in the Rockies: 720-470-3653 / mshafroth@csg-pr.com