



## SRI in the Rockies

### *The Premier Conference for Socially Conscious Investors and Investment Professionals*

The 21st annual SRI in the Rockies Conference will be held November 18–21, 2010 at the [JW Marriott Hill Country Resort & Spa](#) in San Antonio, Texas. SRI in the Rockies is an annual gathering of the sustainable and responsible investment industry (SRI) designed to stimulate, inspire, and serve the needs of investment professionals, as well as institutional and high net worth investors who seek to direct investment capital in more positive, healthy, life-affirming, and transformative ways.

As the premier industry conference in North America, SRI in the Rockies offers attendees many opportunities to meet and learn from passionate, creative people from all corners of the SRI community in the United States and around the world. SRI in the Rockies is owned and produced by [First Affirmative Financial Network](#) in collaboration with a number of organizations in the SRI industry, including the Social Investment Forum (SIF). First Affirmative has been providing leadership within the SRI community since 1987, and has produced SRI in the Rockies since 1990.

#### **A Gathering of Experts**

Over 650 financial professionals and industry practitioners are expected to attend this year's conference—split somewhat evenly among licensed investment professionals serving investor clients; SRI mutual fund companies, asset managers, social research organizations, and other product/service providers to the industry; and investors and nonprofit organizations including community development banks and credit unions, faith based organizations, and other groups that work with the SRI industry on various social change initiatives. With its broad-based presentations from a variety of professional perspectives, the conference has become the place for professionals working or interested in sustainable investing to learn, network, and grow with their colleagues. Speakers and a complete agenda for the 2010 conference can be viewed at [www.SRIintheRockies.com](http://www.SRIintheRockies.com), as can the agendas from the past couple of conferences.

#### **A Growing Trend: Making Money and Making a Difference**

Sustainable and responsible investing is a process that considers the social and environmental consequences of investments—both negative and positive—within the context of rigorous financial analysis. Whether it's called "green," "values-based," "socially responsible," or "sustainable" investing with a higher purpose integrates personal values and institutional missions into an investment strategy tailored to the investor's financial goals.

Sustainable and responsible investing (SRI) is thriving in the United States, growing at a faster pace than the broader universe of all investment assets under professional management. According to the Social Investment Forum's *2007 Report on Socially Responsible Investing Trends in the United States*, approximately \$2.71 trillion in total assets under management are invested using one of the three core SRI strategies—screening, shareholder advocacy and community investing—up from \$2.29 trillion in 2005. The SIF is conducting new research and plans to publish an updated Trends Report in late 2010.

### Summit Camp Pre-Conference Meeting

With increasing client demand for SRI products and services, First Affirmative offers a comprehensive suite of services uniquely designed to meet the needs of socially conscious individual and institutional investors and the investment advisors who serve them. We also produce regional mini-conferences that we call BaseCamps. Participants have an opportunity to network, learn from experts, and teach colleagues about issues of importance to their socially conscious clients. In 2010, BaseCamps are being offered in:



- San Francisco, CA, March 23
- Portland, OR, April 20
- Denver, CO, May 12
- New York, NY, June 16
- Seattle, WA, July 15

The series culminates with a Summit Camp in San Antonio, TX November 16-17, just prior to the 21st annual SRI in the Rockies Conference. For more information on BaseCamp events, go to <http://basecampsri.firstaffirmative.com/>.

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