

9/6/2007

INVESTORS' CIRCLE FALL CONFERENCE PROGRAM **PATIENT CAPITAL FOR A SUSTAINABLE FUTURE**

November 14-16
Boston Harbor Hotel
Boston, MA

Wednesday, November 14th: Investors' Circle Member Events

These events are open to members of Investors' Circle only.*

9:30 – 3:00 pm	Power of Angel Investing Seminar	John Adams Salon
3:30 – 8:00 pm	Member Registration	John Adams Foyer
4:00 – 5:00 pm	New Member Orientation	John Adams Salon
5:00 – 7:00 pm	Members Only Meeting	John Foster Salon
7:00 – 10:00 pm	Members Only Reception	Rotunda

Featured Speaker: *Tom Chappell*, CEO and Founder, Tom's of Maine

* If you are seriously considering joining Investors' Circle as a member, you are welcome to attend this evening. For more information about Investors' Circle membership, please contact us at 617-566-2600.

9/6/2007

Thursday, November 15th: Venture Fair (open to accredited investors only)

8:00 – 8:45 am	Registration & Breakfast	Wharf Room & Foyer
8:45 – 9:15 am	Welcoming Remarks	Wharf Room
9:15 – 10:45 am	Company Presentations: <i>Food & Organics, Health & Wellness</i>	Wharf Room
10:45 – 11:00 am	Break	Wharf Room
11:00 – 11:45 am	Company Presentations: <i>General*</i> *Includes Education and Community & International Development	Wharf Room
11:45 – 12:30 pm	Entrepreneur Showcase	South Atlantic Room & Foyers
12:30 – 1:45 pm	Lunch	North Atlantic Room
1:45 – 3:30 pm	Company Presentations: <i>Media, Energy & Environment</i>	Wharf Room
3:30 – 4:45 pm	Entrepreneur Showcase	South Atlantic Room & Foyers
4:45 – 6:30 pm	The Investors' Circle	North Atlantic Room
6:00 – 9:00 pm	Reception & Keynote Address	Wharf Room
6:30 – 7:00 pm	Keynote Speaker: <i>María Otero</i> , ACCION International	

9/6/2007

Friday, November 16th: Education Day

7:00 – 8:00am	Yoga Session	
7:30 – 8:30 am	Registration & Breakfast	Wharf Room
8:30 – 9:00 am	Welcoming Remarks	Wharf Room
9:00 – 10:30 am	Plenary Session: <i>Emerging Markets: Investing to Serve the Poor</i>	Wharf Room

Panelists: **William Foote**, EcoLogic Finance
 Debbie Hall, Village Enterprise Fund

Small business enterprises in emerging markets offer enormous opportunities to address the needs of the world's poorest people. This panel will address a number of questions about how patient capital can help support and develop those enterprises best suited to creating economic opportunity, healthy communities, and sustainable business practices in emerging markets.

Panelists will address the following questions:

- 1) How can investors identify small businesses that address key questions of poverty, disease, and climate change in emerging markets?
- 2) What investment vehicles offer the best chances to support the creation and development of sustainable business strategies that create social and environmental value?
- 3) How do changes in the global private equity investment market support or challenge our ability to support sustainable businesses through investment?

Panelists will come from organizations with practical experience in identifying, supporting, and evaluating the impact of sustainable small businesses in emerging markets.

10:30 – 11:00 am	Break & Networking	Wharf Room	
11:00 – 12:15 pm	Keynote Address: <i>Jacqueline Novogratz</i> , Acumen Fund	Wharf Room	
12:15 – 1:45 pm	Lunch	Wharf Room	
1:45 – 3:15 pm	Breakout Sessions	Clean Energy Market Trends Purpose-Driven Capital: Optimizing for Sustainability Global Health & International Development Values-Integrated Leadership: An Experiential Journey of Beliefs †	North Atlantic Room South Atlantic Room Foster Room Adams Room

† By reservation only; limited to 25

9/6/2007

Breakout One: Clean Energy Market Trends

How do current trends in various Clean Technology sectors affect both investors' strategies and environmental sustainability? Panelists will examine technology innovations and marketplace developments, with a particular focus on renewable energy and energy efficiency.

Opening: Warren Leon, Massachusetts Renewable Energy Trust

Moderator: Rob Pratt, Henry P. Kendall Foundation

Panel: David Brewster, EnerNOC
Susan Preston, CalCEF Clean Energy Angel Fund
Bic Stevens, Ardour Capital

Breakout Two: Purpose-Driven Capital: Optimizing for Sustainability

Is investing a moral act? Or, is the operation of free capital markets an essentially amoral activity? What are the boundaries separating fiduciary responsibility and moral responsibility? Panelists and session participants will share new thinking and emerging models to evolve modern portfolio theory, expand fiduciary responsibility, and nurture new intermediaries which seek to optimize our global health rather than our private wealth.

Moderator: Jay Coen Gilbert, B Lab

Panel: Woody Tasch, Investors' Circle
John Fullerton, Former CEO of Alerian Capital

Breakout Three: Global Health and International Development

Seasoned technology CEOs share their stories about raising capital, introducing new technologies, and addressing human health issues in developing countries. Through the lens of their experiences, weigh the pros and cons of funding alternatives and various entrepreneurial approaches within this ever-evolving industry.

Moderator: Phil Villers, GrainPro

Panel: Amir Alexander Hasson, United Villages
Paul Meyer, Voxiva
Sandy Pentland, MIT

Breakout Four: Values-Integrated Leadership: An Experiential Journey of Beliefs

You know about Tom's of Maine and its successful CEO, Tom Chappell, who decided to build a company based on his values and beliefs. Tom developed a consumer product line, management system, and business model based on values that helped pave the way for corporate social

9/6/2007

responsibility and sustainability. In 1999, Tom founded **The Saltwater Institute**, a non-profit educational organization, to help leaders work from a values-integrated perspective. The Seven Intentions of Values-Integrated Leadership is an inner experiential journey through your values and beliefs that will inspire and drive you to action. This workshop on values-integrated leadership will awaken your passions and clarify why you're on the path you've chosen.

Attend this workshop if you want to:

- Find more meaning in your work
- Discover your true leadership self
- Explore your core values and live from them
- Balance personal and professional objectives
- Connect with goodness
- Be with others who share the same goal

Facilitator: Eileen Conlon, The Saltwater Institute

Please note: This is a 2-part workshop occurring during both breakout periods.

3:15 – 4:00 pm	Break & Networking	Adams & Atlantic Foyers
----------------	--------------------	-------------------------

4:00 – 5:30 pm	Breakout Sessions	Evolution of Capital Markets	North Atlantic Room
		Sustainable Food Marketplace	South Atlantic Room
		Media That Matters	Foster Room
	Values-Integrated Leadership: An Experiential Journey of Beliefs (cont'd.)‡		Adams Room

Breakout One: Evolution of Capital Markets

What do entrepreneurs, investors, foundations and philanthropists need to know to navigate this unfamiliar territory?

Moderator: Don Shaffer, BALLE

Panel: Karyn Barsa, Former CEO of Smith & Hawken
Heerad Sabeti, TransFORMS & Fourth Sector Network

Breakout Two: Sustainable Food Marketplace

From Wal-Mart to college campuses, more and more retail food outlets are offering organic, local, and fair trade options, while new products address a growing number of food systems concerns. Hear what seasoned food investors and entrepreneurs have to say about staying on top of this changing landscape.

‡ By reservation only; limited to 25

9/6/2007

Moderator: Chuck Lacy, Former CEO of Ben & Jerry's

Panel: Trish Karter, Dancing Deer Baking Co.
Ridge Shinn, Bakewell Reproductive Center
Greg Steltenpohl, Founder of Odwalla

Breakout Three: Media That Matters

As people increasingly seek out information from nontraditional sources including ethnic media, podcasts and blogs in addition to the more traditional print, radio, film and television media (or combinations thereof), what new opportunities exist for media investors? How are niche media companies successfully working together to compete with the big players, both for audiences and investment dollars?

Breakout Four: Values-Integrated Leadership: An Experiential Journey of Beliefs

Part 2 of this workshop. See description above for more information.

6:00- 7:00 pm	Reflections: A Quaker Style Meeting	Foster Room
---------------	-------------------------------------	-------------

5:30 - 8:00 pm	Closing Reception & Networking	Wharf Room
----------------	--------------------------------	------------