



OCTOBER LUNCHEON PROGRAM

“SUSTAINABLE INVESTING”

TUESDAY, OCTOBER 22, 2019

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

Casey Jojic, Head of Sustainable Investing Solutions at UBS Global Wealth Management, will define sustainable investing, discuss the growth of global trends and speak to the evolution of this philosophy. As high-net worth individuals and institutional investors continue to align their social goals & mission statements with their investment goals, Casey will discuss how environmental, social and governance factors play a critical role in this planning process.

She will also discuss several examples of companies that successfully and unsuccessfully incorporated material non-financial data into decision making and the impact it had on shareholder value.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:

Casey Jojic is an Executive Director and the Head of Sustainable Investing Solutions for Wealth Management USA at UBS, where she is responsible for driving product implementation strategy. In this role, she leads field engagement efforts to drive education and awareness around sustainable investing and leads program management efforts to build out and grow the firm's SI platform. Prior to this, she held various chief of staff and business management roles across the firm, primarily in the Wealth Management USA Banking Group. Casey spent 7 years working at Merrill Lynch prior to joining UBS.

Casey graduated from Lehigh University with a dual degree in Finance and Economics and received her MBA from NYU's Stern School of Business. She has her Series 7 and Series 63.

This meeting is being sponsored by



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**OCTOBER 22, 2019 LUNCHEON PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after October 18, 2019.

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Please select your lunch entrée:

- Grilled Swordfish, Coconut Lime Rice, Black Bean Pool, Pineapple Salsa
- Pumpkin and Roasted Mushroom Farro Risotto, Kale Ribbons, Sage and Parsley Pesto
- Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Fee: \$15 per Credit)

- Continuing Legal Education (1 credit).....Attorney ID: _____
- Insurance Continuing Education (1 credit).....License Number: _____
- CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

- Check Payment (Payable to PEPC)
- Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)