



## ETHICS FORUM

### “ESG INVESTING AND THE ETHICS OF NUANCE: THE ETHICAL PITFALLS OF IMPLEMENTING ESG STRATEGIES”

TUESDAY, APRIL 23, 2024

THE UNION LEAGUE OF PHILADELPHIA  
140 S. BROAD STREET  
PHILADELPHIA, PA

8:00 A.M. – 8:30 A.M. REGISTRATION & BREAKFAST  
8:30 A.M. – 10:30 A.M. PROGRAM

What does a trustee do when a beneficiary request that the trust invests in “ESG”? As demand for environmental, social and governance (“ESG”) investment themes increases exponentially, the traditional tension between grantor intent, beneficiary rights and fiduciary obligations become ever more stressed. What exactly is ESG? What ethical obligations may it create? How do traditional trustee metrics and rules apply? What new issues should we consider? Join us as we explore the ethics of ethical investing when some of the beneficiary group want to invest in ESG.

**2.0 Education Credits for CLE (PA Only), Insurance (PA Only), CFP,  
CPA (PA Only), PACE and CTFA will be offered.**

#### **Speakers:**

- Renzo Cerabino, PNC Bank
- Jennifer Goode, Bernstein Private Wealth
- Mark Hays, Glenmede Trust

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# APRIL 23, 2024 ETHICS FORUM REGISTRATION FORM

## Registration Fees:

PEPC Members: \$60  
*Includes CE Credits*

Non-Members: \$80  
*Includes CE Credits*

*\$5 additional charge for walk-in registrations at the door without pre-registration.  
**No-shows will be billed. No refunds after April 19, 2024***

## ATTENDEE INFORMATION:

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Registration Fee: ☐ PEPC Member (\$60 per person) ☐ Non-Member (\$80 per person)

## CONTINUING EDUCATION INFORMATION:

(Included in Fee)

☐ Continuing Legal Education - ETHICS (2 credits).....Attorney ID: \_\_\_\_\_

☐ Insurance Continuing Education (2 credits).....License Number: \_\_\_\_\_

☐ CFP® Continuing Education (2 credits).....CFP Board ID: \_\_\_\_\_

*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](http://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](http://www.philaepc.org)

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