

FPA SF May 13, 2008 Meeting Information

PRESENTATION TITLE:

Socially Responsible Investing: *From the Social Conversation to Customized Portfolio Construction*

PRESENTATION DESCRIPTION:

Many products in the SRI marketplace are viewed as flawed in that they are either pricey, actively managed products with weak performance, or they are index products with limited flexibility and no SRI proxy voting. These offerings also often fail to fully reflect an investor's core values. As awareness of environmental, social, and governance factors increases, family offices, wealth managers and foundations will be under increasing pressure to incorporate their clients' specific values. Does incorporating values into a portfolio doom investors to sacrifice returns or pay high fees? In this session, Patrick Geddes will discuss the challenges and opportunities of customized socially responsible index portfolios.

SPEAKER:

Patrick Geddes, Chief Investment Officer, Aperio Group

SPEAKER BIO:

Patrick Geddes, Chief Investment Officer, Aperio Group

Patrick Geddes is a Co-Founder and Chief Investment Officer of Aperio Group, LLC, a quantitative money-management firm in Sausalito, California. Prior to co-founding Aperio, Mr. Geddes was the Director of Quantitative Research and CFO of Morningstar, where he created customized performance benchmarks and mutual fund research tools for individual investors. Before Morningstar, he spent five years with Amoco, now part of BP, in the U.S. and Europe providing quantitative analysis, currency hedging and corporate tax optimization. Mr. Geddes received his M.B.A. in Finance from the University of Chicago and his B.A. from Yale University. He has taught M.B.A.-level portfolio theory and financial modeling courses for the University of California Berkeley Extension.

AUDIO VISUAL & OTHER NEEDS: Screen and projector.

CFP CONTINUING EDUCATION: 1 CE