



Responsible Alpha advises institutions on their transition paths to a low-carbon, sustainable, and equitable future.

USA Judo Board Platform Statement: Gabriel Thoumi

Dear USA Judo,

I am honored to be nominated to join your board to support USA Judo grow its presence throughout the U.S. While I am not a judo athlete despite sailing across Atlantic and climbing 6K meter mountains with signs protesting for immediate action to stop climate change, I cannot speak to the opportunities you see as professional athletes for judo in the US to grow. Yet, I do see my potential board role as both a catalyst and a doer for USA Judo.

Throughout my career, I have designed and executed many innovative and successful programs, either as a leader, partner, or follower. These programs have ranged from administrative to sustainable business innovation to green finance. It is this specific skill that I possess that I want to offer to USA Judo – “to partner with you so you can achieve your goals”.

When I was in high school 35 years ago, I decided to raise \$30K in funds and donated services via an informal NGO that I set up to purchase a used ambulance, fill it with medical equipment, and drive it to northern Mexico as an early precursor to sustainable development.

Next, during college, I worked and studied for five months at sea on the Atlantic Ocean analyzing ocean health and collecting data demonstrating plastic pollution.

Later, 25 years ago, I decided to focus my career on designing innovative solutions to solve the sustainability and climate crises that impact our lives. After obtaining graduate education at the intersection of natural resources, business, and cities – where our greatest sustainability and climate impacts and opportunities lay – I spent the next 20 years working globally leading and participating on innovative solutions to these crises we face.

For example, with colleagues, I partnered in designing the business plan for a private sector program that protects more than 500,000 acres of rainforest in Indonesia. To this day, our project is visible from Google Earth and sequesters millions of tons of carbon dioxide while providing sustainable livelihood options for local communities.

I then worked with various public sector and private sector institutions – USAID, IFC, Calvert Investments, Climate Advisers, and Planet Tracker to name a few – in leadership roles developing innovative research that drove multiple award winning sustainability innovations across multiple sectors of the economy.

From this platform, I launched Responsible Alpha, a corporation that advises institutions on their transition paths to a low-carbon, sustainable, and equitable future. Responsible Alpha is a registered Public Benefit Corporation in the State of Delaware proudly owned by its staff, advisors, and board members.

For USA Judo, I offer you my skills to you as both a catalyst and a doer. This is what I am good at – enabling challenges to be overcome for institutions grow however they wish. Tell me what you want, and let’s make it happen together.

Warm regards,
Gabriel Thoumi, CFA, FRM, Certified Ecologist

10 September 2024

Vienna • DC • Montreal • Boston
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GABRIEL THOUMI, CFA, FRM, CERTIFIED ECOLOGIST

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ESG AND SUSTAINABLE FINANCE MANAGER

Sustainability expert and ESG integration manager, MBA/MSc, with over 15 years' experience in social and environmental assessment and E&S risk mitigation. Strong analytical and problem-solving skills with a global track record in advising clients on identifying key E&S risks and on tapping into an organization's potential for enhancing ESG performance and improving compliance. Experienced with IFC's Sustainability Framework including leading team conducting quantitative assessment of 656 IFC investments / loans over 20 quarters for E&S correlation, causation, and materiality between E&S and investment risks. In-country work experience in 25+ countries, including low-income countries and fragile states. Experienced leader of diverse, multi-cultural teams with a passion for mentoring and building talent for the future. Excellent cross-cultural communicator, frequent speaking engagements and widely published in the field of ESG. Strong global network, including Latin America, Asia, and Europe. More than 400 speaking engagements globally since 2007. Edited two finance textbooks on sustainable finance and land-use and oceans. Written and edited more than 60 sell-side research reports and more than 300 finance blog newsletters globally. Engaged board of directors and CEOs of more than 40 corporations in the S&P 500. Previous US regional political appointee focused on long-term climate physical and transition risk for the Washington, DC metropolitan area. Worked in the following EU countries on agriculture and related risks: France, Netherlands, Switzerland, Austria, Italy, North Macedonia, Greece, Denmark, Norway, and UK (when part of EU27).

EXPERIENCE

CEO and PRESIDENT, Responsible Alpha, Washington DC & Vienna

2022-Present

- Developed global ESG advisory services consultancy supporting transition to a low-carbon, sustainable, and equitable future by governments, corporations, banks, and asset managers
- Structured profitable business with successful launch, board of directors, advisors, and global contractor team
- Facilitated membership in leading global initiatives such as the Net Zero Financial Service Providers Alliance and others
- Management of 15+ staff, 20+ advisors, and 9 board members from diverse cultural and disciplinary backgrounds across different locations and time zones
- Mentoring and training of junior team members in ESG integration and client engagement
- Successful completion of 10 multidisciplinary projects advising clients on improving ESG performance, including:
 - Austrian timber sector analysis re: EUDR
 - Authoring SEC climate risk submission with Ocean Conservancy including 12 cases on global corporations submitted to SEC by more than 120 institutions
 - Developing an integrated SDGs, GRI, and ESG platform across 109 indicators for a client to be used in more than 30 countries by more than 1,000 staff
 - Co-authoring book on the future of green bonds for the Inter-American Development Bank
 - Conducting field research, coalescing data, and designing sustainable finance instruments to be used across 4 U.S. fisheries to support achieving maximum sustainable yield
 - Calculating year-by-year climate risk, converting to interest rate expense for \$400 million bond issuance in the U.S. over 30 years
 - Conducting climate risk, sustainability, and ESG capacity building for large GSIB bank across 15+ emerging markets countries in sub-Saharan Africa and Asia

DIRECTOR OF FINANCIAL MARKETS/HEAD OF PLASTICS PROGRAM, Planet Tracker, DC, London & Vienna

2019-2021

ESG integration and product manager. Promoted.

- Managed ESG research quality control, editing, and data governance for 17 ESG investment reports
- Wrote and edited 17 ESG investment reports across multiple asset classes used by asset managers and lending institutions
- Advised Norwegian Government Pension Fund, Aviva, BlackRock, Vanguard, Citi, S&P, Moody's and others on plastics and other natural capital themes; specifically, agriculture and food policies in the EU on the following:
 - Growing for Profit: Food and Agriculture Equity Funds Can Improve Their Investment Performance by Aligning with Sustainable Food Systems, 2020
 - Financial Accounting in the Agriculture Sector From Natural Capital to Accounting to Valuation – Commentary on IAS 41: Agriculture, 2020
 - Loch-ed Profits: Forecast farmed salmon industry growth not converting to stable profit margins, 2020
 - Scope for Improvement: Accounting for food loss and waste in Scope 3 reporting, 2020
 - The Sovereign Transition to Sustainability: Understanding the dependence of sovereign debt on nature, 2020
 - Shell Shock - Mangrove Deforestation Threat to Farmed Shrimp Investments, 2020

- Salmon Feels the Heat: Capital at Risk From Investor Concentration Risk in the Salmon Aquaculture Industry, 2019
- Managed data scientist team mapping global supply chains integrating spatial finance with data from Bloomberg, Refinitiv, and Orbis
- Organized ESG and the Global Plastics Supply Chain Conference, keynotes by Gregory J. Fleming, CEO, Rockefeller Capital Management and Raúl Grijalva, US House of Representatives; event had 20 speakers and over 500 institutions represented
- Winner ESG Innovation of the Year (Research) 2020, Environmental Finance, for emerging markets sovereign debt analysis

DIRECTOR OF CAPITAL MARKETS, Climate Advisers, Washington DC

2015–2019

ESG integration and product manager. Promoted twice.

- Co-wrote 25 ESG investment reports and investment 100 blogs assessing food and agriculture supply chain, deforestation, and natural capital risks, published by CFA Institute, Bloomberg, WRI, trade publications, co-managed Chain Reaction Research
- Wrote 90+ financial articles on EU and US agriculture policies and risks associated with importing deforestation-linked products
- Advised Norwegian Government Pension Fund, Norges Bank' Council of Ethics, Aviva, Legal and General, BlackRock, J.P. Morgan, HSBC, Indonesian Anti-Corruption Commission, US SEC, EU Interpol, others on ESG integration, climate risks, and agriculture issues
- Managed data scientists designing corporate governance risk tools; co-wrote successful \$4 million grant proposal for tools
- Speaker, Oslo Tropical Forest Forum on agriculture and deforestation risks facing EU investors
- Led index and ETF construction for supply chain transparency and deforestation risks; ran quantitative backtests and simulations
- Consulted to IFC assessing 656 IFC investments for correlation, causation, and materiality between ESG and investment risks

SENIOR SUSTAINABILITY ANALYST, Calvert Investment Management, Washington DC & EU

2013–2015

Buy-side role, ESG integration, for \$13 billion AUM.

- Covered EU and US agriculture, financials, materials and other sectors for 41 funds including thematic Green Bond, Water, Energy, EU, and other equity and fixed income funds
- Managed quality control for EU and US natural capital ESG data
- Member ESG integration team launching Calvert Responsible Index Series
- Engaged S&P 500 companies including Moody's, ICE, Nasdaq, BAML, others negotiating ESG commitments with EU and US agriculture firms, filed 30+ proxies
- Signing authority for daily pricing variations for fixed income and equity securities, and Net Asset Valuation pricing exceptions
- Authored low-carbon transition papers with Deutsche Bank, JPMorgan, Ceres, WWF, As You Sow, others
- Global Innovation Lab for Climate Finance 2015 winner, with Inter-American Development Bank for the Agriculture Supply Chain Adaptation Facility, developed risk management tools and investment fund
- Technical review committee, Long-Term FX Risk Management, TCX Amsterdam, and Climate Investor One, Netherlands Development Finance Company FMO
- Bellagio Natural Capital Fellow, Rockefeller Foundation, Italy, 2014, recipient, managed and priced natural capital risk across equity funds
- Technical Advisor, Greece, Agriculture and Forest Carbon Market

SENIOR DIRECTOR FINANCE & CARBON MARKETS, Terra Global Capital (USAID), Washington DC, Lima & Quito

2011–2012

Assessing ESG integration options for USAID country programs, Forest Carbon, Markets, and Communities program. Contractor.

- Hired staff to manage production of 8 reports assessing US Government's credit, lending, and risk tools to enable green growth
- Representing U.S. Government from US Embassies in Ecuador and Peru at vice-minister cabinet-level meetings in Latin America

BUSINESS DEVELOPMENT MANAGER, Forest Carbon Offsets, LLC, Washington DC

2009–2011

Investment due diligence and ESG analysis on carbon offset projects.

- Invested \$5 million in emerging markets, conducted scenario analysis and due diligence, managed audit process
- Authored project documents (VCS, CCB) integrating scientific, spatial and financial data, managed team of Virginia Tech ecologists, engaged Indigenous Peoples and forest dependent stakeholders, attended The Forest Dialogues, Yale University

BUSINESS DEVELOPMENT MANAGER, MGM International, Miami

2008–2009

Investment due diligence and ESG analysis on carbon offset projects. Projects traded on Chicago Climate Exchange.

- Analyzed emerging markets investments, performed risk analysis, co-wrote project design documents (CCX, CDM, VCS, CCB)
- Supported clients' execution of "industry first" projects in Australia, Brazil, and elsewhere, including due diligence

FINANCIAL INSTITUTIONS ANALYST, Wells Fargo & Company, Minneapolis & San Francisco

2000–2003, 2005

Correspondent banking, fixed incoming trading support and performance analyst. Promoted twice. Returned in 2005 as a consultant.

- Performed performance analysis integrating \$34 billion Strong Funds purchase into Wells Capital Management's assets

- Positioned \$4 billion daily in Fed Funds, reported Basel/bank stress tests, conducted credit and counterparty risk analyses
- Managed \$16 billion fixed income fund securing public deposit accounts, reconciled \$2 billion in fixed income trades daily

TEACHING

EXECUTIVE EDUCATION

- **2022-Present: Sustainability, ESG, and Climate Risk Integration** - taught to finance leaders (Mennta Energy Solutions).
 - Six cohorts taught including three Standard Chartered Bank cohorts.
 - Other cohorts included Bank of America, UBS, ING, and others.
 - 20-hour course.
 - Preparation for the GARP SCR® exam.
- **2019-21: Nature-based Solutions and Conservation Finance, GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit).**
- **2019-21: Introduction to ESG Integration in Financial Decision-making, GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit).**

GRADUATE EDUCATION

- **2025: Sustainable Finance, University of Applied Sciences Upper Austria.**
- **2022-Present: Sustainability, ESG, and Climate Risk Integration, SAIS Johns Hopkins University.**
- **2016: 2 credit graduate independent study University of Maryland, Robert H. Smith School of Business.**
- **2015: BUFN 758G: Sustainability and Investing, University of Maryland, Robert H. Smith School of Business.**
- **2010: Impact Investing, Strategy 739, Ross School of Business, University of Michigan.**

UNDERGRADUATE EDUCATION

- **2016-Present: Financing a Sustainable World, Johns Hopkins University.**

GUEST LECTURES

- University of Michigan.
- Yale University.
- Brandeis University.
- University of Oxford.
- University of Chicago.
- Columbia University.
- University of Texas-Austin.
- Bentley University.
- George Mason University.
- University of St. Thomas.

CASE STUDY COACHING

- Kellogg Morgan Stanley Sustainable Investing Challenge, mentored and coached finalist from University College London, 2023.

EXAMPLE CONTENT

- EU and US Petrochemicals, plastics, converters, and FMCGs 2+ hrs.
- EU and US natural capital, agriculture supply chains, biodiversity, deforestation, human and community rights, and oceans 6+ hrs.
- EU and US foundations of climate change for private sector participants 4+ hrs.
- EU and US financial accounting in the agriculture sector, climate change, and fraud 2+ hrs.
- Sustainability principles, climate policy and governance for private sector participants 4+ hrs.
- Climate change risk for private sector participants 3+ hrs.
- Green (and labeled) and sustainable finance instruments including portfolio management and bank lending 6+ hrs.
- Climate risk measurement, management, models, and scenario analysis 4+ hrs.
- Mechanics of conservation finance: 2+ hrs.

PUBLICATIONS

BOOKS EDITED

- Conservation of Tropical Coral Reefs: A Review of Financial and Strategic Solutions, Brian McFarland, Palgrave Macmillan.
- Conservation of Tropical Rainforests: A Review of Financial and Strategic Solutions, Brian McFarland, Palgrave Macmillan.

CHAPTERS

- Climate Finance and Greening China's Finance in Sustainable Investing: Revolutions in Theory and Practice, 2016, Routledge.
- Financing Climate Smart Landscapes in Sustainable Investing: Revolutions in Theory and Practice, 2016, Routledge.
- Palm Oil: Mitigating Material Financial Risks via Sustainability (chapter), 2018, Designing a Sustainable Financial System: Development Goals and Socio-Ecological Responsibility, Palgrave Macmillan.
- Forest Carbon Business Strategy in Forests and Climate Change: Adaptation and Mitigation (chapter), 2009, European Tropical Forest Research Network, TropenBos.
- Industry-level frameworks to improve access to REDD+ financing in Good Business: Making Private Investments Work for Tropical Forest (chapter), 2012, TropenBos.
- European Tropical Forest Research Network #58: Zero deforestation: A commitment to change - Equity valuation, revenue-at-risk, and divestment tools (article), 2017, TropenBos.

PEER REVIEW PAPERS / PROJECT DESIGN DOCUMENTS

- Getting the science right when paying for nature's services, 2015, Science Magazine - contributing author.
- Bull Run Overseas Ltd. Forest Carbon Project Phase I: Project Design Document, 2012, Climate, Community and Biodiversity Standards.
- Boden Creek Ecological Preserve, 2010, Climate, Community and Biodiversity Standards.
- Boden Creek Ecological Preserve, 2010, VCS and Forest Carbon Offsets.
- Bull Run Overseas Ltd. Forest Carbon Project Phase I: Project Design Document, 2012, VCS and Forest Carbon Offsets.

TECHNICAL PAPERS

- US & Natural Capital Accounting, Responsible Alpha, 2023.
- US Chemical Coast, Responsible Alpha, 2023.
- Financial Accounting & Natural Capital: Palm Oil, 2023
- SEC Climate Risk Disclosure, SEC, Responsible Alpha, 2022.
- Breaking the Mould: Business-as-Usual is a High-Risk Strategy for the EU Plastic Industry, 2022, Planet Tracker.
- Dirty Thirty: Can the top 30 publicly traded single-use plastic companies clean up their mess? 2021, Planet Tracker.
- Policing the Plastic Producers: The Director's Duty, 2021, Planet Tracker.
- Policing the Plastic Producers: Director's Cheat Sheet, 2021, Planet Tracker.
- Unwrapping Investor Risk: Global Plastic Containers & Packaging Sector, 2021, Planet Tracker.
- Stormy Outlook for US Plastics Refiners: Risk of Stranded Assets in the Gulf of Mexico, 2020, Planet Tracker.
- Growing for Profit: Food and Agriculture Equity Funds Can Improve Their Investment Performance by Aligning with Sustainable Food Systems, 2020, Planet Tracker.
- Building Back Better: a Marshall Plan for Natural Capital: Reversing the decline in Sub-Saharan African GDP in Nature-Based Tourism Sector from COVID-19, 2020, Planet Tracker.
- Financial Accounting in the Agriculture Sector From Natural Capital to Accounting to Valuation – Commentary on IAS 41: Agriculture, 2020, Planet Tracker.
- Loch-ed Profits: Forecast farmed salmon industry growth not converting to stable profit margins, 2020, Planet Tracker.
- Scope for Improvement: Accounting for food loss and waste in Scope 3 reporting, 2020, Planet Tracker.
- From Drought to Fires to Downgrade Risk New South Wales Faces Long-Term Credit Risks as Natural Infrastructure is Threatened, 2020, Planet Tracker. Cattle are More than just Beef: Dairy Cattle's Ecological Footprint Material to Investors as US and EU Policies Adjust, 2020, Planet Tracker and Fitch Solutions.
- The Sovereign Transition to Sustainability: Understanding the dependence of sovereign debt on nature, 2020, Planet Tracker.
- Shell Shock - Mangrove Deforestation Threat to Farmed Shrimp Investments, Jan 2020, Planet Tracker.
- Salmon Feels the Heat: Capital at Risk From Investor Concentration Risk in the Salmon Aquaculture Industry, Dec 2019, Planet Tracker.
- Perfect Storm: Profits at Risk in the Japanese Seafood Industry, Sep 2019, Planet Tracker.
- Forest Crimes: Are Investors Aware of Related Financial Risks? Jun 2018, CFA Institute.

- Mining Global Financial Data to Increase Transparency and Reduce Drivers of Deforestation, Jun 2018, WRI and Climate Advisers.
- Financial Risks from Climate Change: How U.S. Capital Markets are Responding, 2018, Climate Advisers.
- How Deforestation Risks for Investors can Become Opportunities for Conservation, 2018, Mongabay.
- Cargill: Zero-Deforestation Approach Leaves Room for Land Clearing in Brazil's Maranhão, 2018, Chain Reaction Research.
- Private Equity Investment in Consumer Goods Industry Could Jeopardize Zero-Deforestation Efforts, 2018, Chain Reaction Research.
- TH Plantations and PT Synergy Oil Nusantara: Leakage Risks At Plantation and Refinery, 2018, Chain Reaction Research.
- The Financing of Leakage Refiners: Shareholders and Loan Issuers Include International Financial Institutions with Palm Oil Policies, 2018, Chain Reaction Research.
- 2017 Indonesian Palm Oil Sector Benchmark: Revenue at Risk vs. Palm Oil NDPE Sourcing, 2017, Chain Reaction Research.
- Addressing Environmental, Social, and Ethical Challenges of the Annual Haze in Southeast Asia from a Singaporean Perspective, 2017 publication description UNSECO and PM Haze – contributor.
- Alicorp: Peru's dominant palm oil player has NDPE opportunity, 2017, Chain Reaction Research.
- Banks Finance More Palm Oil Than Investors: Investors Face Indirect Exposure, 2017, Chain Reaction Research.
- Engage the Chain Supply Chain Case Studies, 2017, Ceres.
- Environmental Justice Toolkit, 2017, Metropolitan Washington Council of Governments.
- Farmland Investments in Brazilian Cerrado: Financial, Environmental and Social Risks, 2017, Chain Reaction Research.
- Grupo Palmas: First Peruvian NDPE Policy Creates Business Opportunities But Strands Land, 2017, Chain Reaction Research.
- Indofood Agri Resources: Material Risks From Contested Land and Labor Issues, 2017, Chain Reaction Research.
- Indofood Sukses Makmur and First Pacific: Financial Risks from Upstream Investments, 2017, Chain Reaction Research.
- Indonesia' Palm Oil Landbank Expansion Limited by Proposed Moratorium and NDPE Policies, 2017, Chain Reaction Research.
- Indonesian Palm Oil's Stranded Assets: 10 Million Football Fields of Undevelopable Land, 2017, Chain Reaction Research.
- JBS: Financial Restructuring Could Be Delayed Due to Serious Allegations, 2017, Chain Reaction Research.
- Olam International – Deforestation Risks from its Peruvian Coffee Supply Chain, 2017, Chain Reaction Research.
- SE Asian Palm Oil Sector: Statistics Suggest Equity Overvalued, 2017, Chain Reaction Research.
- SLC Agrícola: Cerrado Deforestation Poses Risks to Revenue and Farmland Assets, 2017, Chain Reaction Research.
- Sustainable Banking Initiatives: Regulators' Role in Halting Deforestation, 2017, Chain Reaction Research.
- The CFA Institute Enterprising Investor - The Palm Oil Industry: Visualized through Big Data, 2017, CFA Institute.
- The Missing Link: How A Distributed Ledger System Can Support Global Climate Action, 2017, Climate Advisers, Lestari Capital, and Lykke Corp.
- 2016 Sustainability Benchmark: Indonesian Palm Oil Growers, 2016, Chain Reaction Research.
- Economic Drivers of Deforestation: Sectors Exposed to Sustainability and Financial Risks, 2016, Chain Reaction Research.
- IOI Corporation: Customers and Investors Want Sustainability, 2016, Chain Reaction Research.
- Noble Group: Costs of Capital and Deforestation Risks Underpriced? 2016, Chain Reaction Research.
- Palm Oil Frontiers: Lessons Learned from SE Asian Corporate Expansion to Africa, 2016, Chain Reaction Research.
- Palm Oil Revenue at Risk: Failure to Meet Buyers' Procurement Policies Results in Lost Revenue, 2016, Chain Reaction Research.
- Possible IOI RSPO Suspension: RSPO Complaint Financially Material, 2016, Chain Reaction Research.
- Sime Darby: Liberian Crossroads, 2016, Chain Reaction Research.
- Unconventional Risks: The Growing Uncertainty of Oil Investments, 2016, As You Sow.
- Agricultural Supply Chain Adaptation Facility, 2015, IADB and Calvert, Global Innovation Lab for Climate Finance - cowrote winning proposal.
- Carbon Asset Risk: Discussion Framework, 2015, World Resources Institute and UNEP Finance Initiative.
- Common ground: balancing rights and responsibilities for natural resource investments and community development, 2015, Mongabay,
- Envision Courthouse Square: Urban Plan, 2015, Government of Arlington County, Virginia.
- Women on boards, 2015, Calvert Investments.
- Global Financial Indices and Natural Capital Policies Assessment, 2014, Calvert Investments.
- Power Forward 2.0: How American Companies Are Setting Clean Energy Targets and Capturing Greater Business Value, 2014, Ceres, Calvert Investment Management, WWF, DG Partners.
- Finance and Carbon Markets Lexicon, 2012, USAID.
- Integrated REDD+ Assessment of Peru, 2012, USAID.
- Key Findings and Opportunities for REDD+ in Ecuador: An Abbreviated Summary of the Comprehensive Report on the Integrated Assessment of REDD+ in Ecuador, 2012, USAID.
- Léxico Financiero y De Mercados de Carbono, 2012, USAID.
- Risk Management Trends in Forest Carbon: Conventional risk principles inform a rapidly maturing category of investments, 2012, Global Association of Risk Professionals.
- Revista Ecosostenible: Gestionado los riesgos financieros del carbono forestal, 2012, Revista Ecosostenible.
- US Government Investments and Policies to Facilitate Forest Carbon Finance and Markets, 2011, USAID.

FINANCIAL BLOGS

- 90+ blogs on Chain Reaction Research.
- 20+ blogs published by CFA Institute, GARP, Bloomberg, etc.
- 70+ blogs on Seeking Alpha.
- 35+ blogs on ValueWalk.
- 100+ on Mongabay.

PRESENTATIONS GIVEN

Over 300+ presentations given in career

Specific EU presentations and events

- University of Chicago, Corporate ESG and Sustainability Trends: Divestment and Agriculture, 2022.
- REDD+: Moving forward with EU private finance and business engagement – 8th REDD+ Platform meeting, lead speaker, Den Haag, Netherlands, 2013
- Leaders for Nature, IUCN-NL, expert and session moderator, Amstelveen, Netherlands, 2013
- Establishing Open Access Global Science Standards for Payment for Ecosystem Services (PES), Earth Institute Center for Environmental Sustainability (EICES) and the Wildlife Conservation Society, NYC, Jan 15-17, 2013, invited participant.
- UNFCCC COP 16, IETA, “Lessons Learned from REDD: An EU/US Perspective”
- Wall Street Green Summit – EU/US sustainability / agriculture / carbon trends (repeated) 2021, 2020, 2018, 2017, 2016, 2010, 2009
- UNFCCC COP 15, Copenhagen, Denmark – “Reducing Emissions from Deforestation: Opportunities for U.S. and EU Initiatives in Support of a Global Framework” 2009
- CIFOR, Forest Day 3, Copenhagen, Denmark 2009
- The Forests Dialogue, Macedonia – “Investing in Locally Owned Forests” 2009
- The Forests Dialogue, London, UK – “Forests and Climate Change” 2009
- The Forests Dialogue, Gland, Switzerland – “Forests and Climate Change” 2009
- The Forests Dialogue, Montreux, Switzerland – “Forests and Climate Change” 2009
- UNFCCC COP 16, Cancún, México - UN Observer; organizer and facilitator of “Forest Carbon Financial Risk Management Best Practices: US/EU perspectives”
- Carbon Forum Asia, Singapore, “EU / US Risks, Disclosure and Triple Bottom Line Accounting for Carbon Investments” (speaker) 2010
- American Renewable Energy Day, Aspen, CO – “Lungs of the Planet: Carbon Sinks and the World’s Forests – An EU / US Perspective” (moderator) 2010
 - Panel included CEO, UN Forum on Forests, Head Climate Risk, World Bank
- 9th Dialogue on Forests, Governance, and Climate Change, London 2011
- UN Forum on Forests COP 9, New York, NY 2011
- Global PES Standardization: EU / US perspective, NYC, May 20-23, 2012, USAID/Translinks, invited roundtable.
- Bundling and Stacking Roundtable: PES an EU/US perspective, Washington, DC, USAID/TransLinks, April 5-6, 2012, invited roundtable
- Financing opportunities and issues for mitigation and adaptation: EU and US, Forest Day 5, December 4, 2011, invited speaker
- Climate Information Needs for Financial Decision Making (EU and US Perspective), American Meteorological Society (AMS) and the University Corporation for Atmospheric Research (UCAR), Washington, DC, 2013
- Agriculture and forestry in the EU and US - Out of the Rut – Meeting in Findhorn Foundation, Scotland, 2013
- Rockefeller Foundation, Bellagio Lake Como, Italy, Natural Capital Fellows meeting discussing EU/US agriculture and forestry policies
- Agriculture and Forestry: EU and US Perspectives, World Bank, Land and Poverty Conference, 2015
- Scaling Up Responsible Land Governance | Financial Requirements for Linking Markets and Investors to Low-carbon Green Growth in Agricultural Supply Chains – EU and US perspectives, World Bank Land and Poverty Conference 2016
- ESG 2016: For Institutional Shareholders, Public Company Management & Capital Markets Experts | Assurance of Sustainability Practices: Does it Add Value? Agriculture and Forestry, NYC 2016
- EU and US Climate Risk Perspectives, Keynote, New York Stock Exchange, 2015
- UN Principles for Responsible Investment, Webinar on Economic Drivers of Deforestation, EU and US Perspectives, 2017
- Amsterdam, Netherlands. Making No Deforestation Commitments Work in the EU and US, 2016
- Society of American Foresters, National Convention, Palm Oil and Biofuels Policies: Implications in the EU and US, 2016
- Society of American Foresters, National Convention, Palm Oil Producers Integrated Risk Analysis: Experiences from Boots on the Ground in the EU and US, 2016
- MSCI, Nature’s Risks and Returns: A Practitioners’ Exchange on Investing in Natural Capital – Palm Oil Financial Capital at Risk in the EU and US, 2016

- Ross School of Business, University of Michigan, Agriculture and Forestry: Risks and Opportunities to Investors Through the Lens of Palm Oil in the EU and US, 2016
- Pepsico, Strategic Investor Initiative: A Collaborative Exchange Between the World's Leading Companies and Strategic Investors, EU and US: 2016
- World Bank Land and Poverty Conference, Responsible Land Governance—Towards an Evidence-Based Approach, Palm Oil Financial Risks and Mitigation Tools – EU and US perspective, 2017
- CDP, Palm Oil Financial Risks and Mitigation Tools: EU and US perspectives, Lima, Peru, 2016
- Ceres, Webinar on Economic Drivers of Deforestation, 2017
- Council of Institutional Investors. Deforestation Risks: Material to Institutional Investors in the EU and US, 2017
- Thomson Reuters and S-Network Global Indexes Master class for Wall Street institutional investors on MidCentury Balance – how to balance emissions risks with sinks and removals conservation to achieve 2° Celsius outcomes by year, 2017
- Summer in the City 5th Annual CSR Investing Summit, Climate Risk, Resource (Water and Agricultural) Risk, and Financial Performance, 2017
- Chain Reaction Research webinar – JBS: Financial Restructuring Could Be Delayed Due to Serious Allegations, 2017
- Global Association of Risk Professionals webinar, Palm Oil Financial Risks and Mitigation Tools in the EU and US, 2017
- The Nature Conservancy, Palm Oil Financial Risks and Mitigation Tools in the EU and US, 2017
- CDP Latin America Annual Conference – Keynote Speaker, EU and US sustainable agriculture perspectives, Sao Paulo, Brazil
- World Business Council for Sustainable Development Climate Smart Agriculture Conference, Sao Paulo, Brazil, 2017
- Alliance Bernstein, EU and US perspectives on sustainable chemicals, 2021

Other presentations specific to EU and US sustainable agriculture

- CFA Society San Francisco
- CFA Society DC
- CFA Society Austria
- CFA Society NYC
- CFA Society London
- CFA Society Boston
- Innovation Forum
- EU Green Week
- Nexus
- Thompson Reuters
- GARP
- EMIA
- Wall Street Green Summit
- Other

INSTITUTIONS ENGAGED DIRECTLY

- | | | |
|---------------------------------|--------------------------|--|
| ● ABM Industries | ● CME Group | ● Grupo Sura |
| ● Accenture | ● Comerica | ● Hannon Armstrong |
| ● Active Energy | ● Deutsche Bank | ● IADB |
| ● Adani Enterprise | ● Dominion | ● IFC |
| ● ADM | ● Dominion Energy | ● Indofood Agri Resources |
| ● Alicorp | ● Dow | ● Intel |
| ● AllianceBernstein | ● Duke Energy | ● Intercontinental Exchange |
| ● Amazon | ● DuPont | ● International Flavors and Fragrances |
| ● AmBev | ● Eagle High Plantations | ● IOI Corporation |
| ● Amcor | ● Eastman Chemical | ● J.P. Morgan |
| ● American Express | ● Energy Transfer | ● JBS |
| ● Arcos Dorados | ● Equatorial Palm Oil | ● KLK |
| ● Arkema | ● Exelon | ● Kraft |
| ● Astra Agro Lestari | ● FGV | ● Lincoln National |
| ● Bank of America Merrill Lynch | ● Fiat Chrysler | ● London Stock Exchange Group |
| ● Bayer | ● First Pacific | ● Marubeni |
| ● BE Aerospace | ● FirstEnergy | ● Maruha Nichiro |
| ● BlackRock | ● Fitch | ● Microsoft |
| ● Bloomberg | ● Formosa Petrochemical | ● Monsanto |
| ● Bureau Veritas | ● Glencore | ● Moody's |
| ● CBOE | ● Goldman Sachs | ● Morgan Stanley |
| ● Cincinnati Financial | ● Great Plans | ● MSCI |
| ● Citi | ● Grupo Palmas | |

- Nasdaq
- Nestlé
- Noble Group
- Norges Bank
- Norinchukin Bank
- Olam
- Phillips 66
- Pirelli
- PNC
- Praxair
- Refinitiv
- S&P
- Sime Darby
- Southern Company
- Standard Chartered Bank
- State Street
- Stora Enso
- Unilever
- UOB
- Vanguard
- Walmart
- Wells Fargo
- Wilmar
- World Bank

BOARDS, COMMITTEES, & VOLUNTEER

- **GFANZ Technical Working Group**, member 2024-Present
- **Net Zero Financial Service Providers Alliance**, member 2023-Present
- **Nature Crime Alliance**, advisor 2022-Present
- **IFRS Foundation's International Sustainability Standards Board (ISSB) Technical Reference Group**, member 2022-Present
- **S&P, Scientific Sustainable Advisory Council**, member, 2021-Present
- **CFA Institute**, volunteer, 2012-present
- **Global Association of Risk Professionals**, volunteer, 2020-present
- **UNEP Finance Initiative Investment Committee** 2014-2015
- **CFA Institute**, volunteer, 2012-present
- **Global Association of Risk Professionals**, volunteer, 2020-present
- **Washington Metropolitan Council of Governments Air and Climate Public Advisory Committee**, 2016-2021
- **Arlington County Climate Change, Energy and Environment Commission**, 2013-2021
- **Natural Capital Finance Alliance**, Steering Committee 2014-2016
- **The Forests Dialogue**, Switzerland, Nepal, Macedonia, UK, 2009-2011
- **Sustainable Stock Exchange Initiative**, 2014-2015
- **Ecological Society of America**, board advisor, 2023-present

EDUCATION, CERTIFICATIONS, LANGUAGES & ACUMEN

UNIVERSITY OF MICHIGAN, Ann Arbor, MI

MBA, Ross School of Business, 2008

MSc, Sustainable Systems, School for Environment and Sustainability, 2008

Graduate Certificate in Real Estate Development, Taubman College of Architecture and Urban Design, 2008

Internships: American Express, Intel, Ceres, Environmental Finance, WWF, Mongabay and Katingan Project, Indonesian conservation program

Master thesis: *Emeralds on the Equator*, prologue by ex-Minister of Environment, Indonesia

Conservation Finance Bootcamp, Stanford University

Climate Reality Leadership Training, Chicago

UNIVERSITY OF ST. THOMAS, St. Paul, MN

Master of International Management, International Finance, 2002

Aristotle Fund equity analyst, 2003-04

UNIVERSITY OF MARYLAND, College Park, MD

BA Department of Art History & Archaeology and BA Studio Art, 1995

Sea Education Association Maritime Semester & Sea Semester Junior Science Officer

Boston University Tanglewood Institute Empire Brass Seminar I+II

Universidad de los Andes, Bogotá, Colombia

Cum Laude • Phi Beta Kappa • Delivered commencement address

Certifications:

- **CFA**, CFA Institute, 2011
- **Series 7**, FINRA 2014-2017, 2000-2003
- **Series 63**, 2000-2003
- **Certified Ecologist**, Ecological Society of America, 2013
- **FRM**, Global Association of Risk Professionals, 2016
- **LEED AP BD+C & LEED AP O+M**, 2016

Publications: 4 peer review articles, 63 research reports, 3 chapters, 300 articles/reprints, and 2 conservation finance textbooks edited. Full publication list available upon request.

Keynote, podcasts and speaking: Over 350 events since 2007 including CFA Institute, UNFCCC COP, UN, NYSE, World Bank, Innovation Forum, CDP, Sustainable Investment Forum, Climate Week, IETA, others.

In-Country Work Experience: Argentina, Austria, Australia, Belize, Brazil, China, Colombia, Ecuador, France, Greece, Hong Kong, Indonesia, Italy, Japan, Malaysia, Macedonia, Myanmar, Nepal, Netherlands, North Macedonia, Norway, Peru, Romania, Singapore, South Africa, Switzerland, UK, USA, and others.

Programming: Managing ESG product / data scientist teams using SQL, remote sensing, ArcGIS, QGIS, Python and R.

Languages: English (native – C2), Spanish (fluent – C1), Indonesian (moderate – B1), German (moderate - B1).