COIN invites you to participate in its COVID Recovery Webinar, a two-hour online session where we will present six investment opportunities, all of which help vulnerable, under-capitalized communities across California recover from the disproportionate impacts of the COVID-19 pandemic.

Webinar presentations will be split into two segments of COIN approved Investment Bulletins: one segment on investments that support affordable housing opportunities, and the other on investments that benefit small businesses in underserved communities.

COIN COVID Recovery Webinar

Topic: Investments to Support Affordable Housing & Small Business

Date: Wednesday, March 24, 2021

Time: 10am – 12 noon Pacific Time

Listed below, please see the full agenda and speaker bios for further webinar details.

To Register for the webinar and receive the virtual event link, please RSVP to COIN at coin@insurance.ca.gov.

To see the full list of approved COIN Investment Bulletins, all of which provide benefits to underserved communities and the environment, reach out to COIN at coin@insurance.ca.gov, to request an account on the COIN Impact Investment Marketplace.

We look forward to your participation.

Best Regards,

Sukh Randhawa
Chief, California Organized Investment Network

CALIFORNIA ORGANIZED INVESTMENT NETWORK

COIN Webinar: Environmental & Infrastructure Investments

CALIFORNIA ORGANIZED INVESTMENT NETWORK
Insurers investing in a better California

September 22, 2021

10:00 am – 1:00 pm PST

AGENDA

	Opening Remarks
10:00 - 10:15 am	Sukh Randhawa, Chief, COIN – An update on the status of California Senate Bill, SB 1511 (Rubio), a bill to expand the "Leeway Law" for insurer holdings of COIN-qualified Schedule BA investments
Moderator:	Ophir Bruck, Senior Specialist, United Nations-supported Principles for Responsible Investments (UNPRI), and Member, COIN Advisory Board – A mission to combat climate change and create a more sustainable future through investments in electric vehicles, renewable energy and infrastructure.
	Environmental & Infrastructure Investments:
10:15 - 10:30 am	Steve Westly, Founder & Managing Partner, Westly Group – Westly Capital Partners Fund IV
10:30 - 10:45 am	Victor Pascucci III, Managing Partner, Energy Capital Ventures – InterAtlantic Energy Capital Ventures
10:45 - 11:00 am	Zach Knight, Co-Founder and Managing Partner, Blue Forest Conservation – Yuba II Forest Resilience Bond
11:00 - 11:15 am	Hailey Layrock, Senior SBA Trader, Hanover Securities – Banes Capital – Socially Responsible Investment Program
11:15 – 11:30am	John McCartney, Managing Partner, Artesian Impact Partners – Artesian High Impact Green Bond Fund
11:45 – 12:00 pm	Kaitlin Bergan, Director, Senior Platform Strategist, Sustainable Investing, BlackRock – BlackRock Low Carbon Transition Readiness Strategy (ETF Ticker: LCTU)
12:00 – 12:15 pm	Michael Hoverman, Managing Director, Co-Head of Global Partners Group, CIM Group – CIM Opportunity Zone Fund
12:15 - 12:30 pm	Joseph Idaszak, Vice President, Analyst, Brookfield Asset Management – Brookfield Global Renewables & Sustainable Infrastructure Strategy
12:30 – 12:45 pm	Yazann Romahi, CIO, Asset Management Solutions, Quantitative Solutions Group, JPMorgan Asset Management – JPMorgan Carbon Transition U.S. Equity ETF (Ticker: JCTR)
12:45 – 1:00 pm	Closing Remarks

Environmental & Infrastructure Investment Opportunities

Moderator: Ophir Bruck, Relationship Manager, Principles for Responsible Investment (PRI) and Member, COIN Advisory Board

Ophir Bruck leads signatory relations and strategic initiatives in western North America for the United Nations-supported Principles for Responsible Investment (PRI), the world's leading proponent of responsible investment. The PRI supports a global network of more than 3,100 institutional investors and service providers representing $103 trillion in assets under management with the incorporation of environmental, social, and governance (ESG) issues into investment and stewardship policy and practice.

Prior to joining the PRI, Bruck was an investment analyst at the University of California Office of the Chief Investment Officer, where he led the development and implementation of a sustainable investment framework for the university system's endowment and pension assets. Bruck joined the COIN Advisory Board as a representative with experience seeking investments that provide environmental benefits.

Steve Westly, Founder & Managing Partner, The Westly Group

Steve Westly is a seasoned venture capitalist who was an early investor in three $1B+ unicorns including: Tesla ($700B), Sentinel One ($3.1B), Simple Energy ($1.5B). Steve also served on the board of Tesla for 3 years and chaired the audit committee as well as serving on the board of Simple Energy.

Prior to founding The Westly Group, Steve Westly served as the Controller and Chief Fiscal Officer of the state of California – the world's seventh-largest economy. As Controller, he chaired the State Lands Commission and served on 63 other boards and commissions, including CalPERS and CalSTRS, the nation's two largest public pension funds, which together invest more than $350 billion.

Before running for office, Steve helped guide the online auction company eBay through a period of rapid growth, serving as Senior Vice President of Marketing, Business Development, M&A, and International. Prior to eBay, Steve served as an investment banker and as an executive in a number of Silicon Valley companies.

Steve began his career in Washington, D.C., where he worked on Capitol Hill and in the Office of Conservation and Solar at the U.S. Department of Energy. Steve then returned to California to become the special assistant to the president of the California PUC. While there, he published two books on alternative energy and utilities. In 2010, Secretary of Energy Steven Chu appointed Steve to serve on his National Advisory Board. Steve has a bachelor's degree from Stanford University and an MBA from Stanford's Graduate School of Business, where he served on the faculty for five years.

Victor Pascucci III, Managing General Partner, Energy Capital Ventures

Victor Pascucci III is the Managing General Partner of Energy Capital Ventures. He is accountable for the day-to-day operations and strategic direction of the firm. Vic has led and managed venture investments in numerous multi-billion-dollar companies and category defining leaders including Coinbase (NASDAQ:COIN), ID.me, MX, Extend, Personal Capital (acquired by Empower Retirement), TRUECar (NASDAQ: TRUE), Next Insurance, Care.com (NYSE: CRCM) and Clearcover. He has achieved a top-decile investment track record. Vic has over 20 years of experience in venture capital and financial services encompassing over $750 million in VC and M&A transactions. He is on the board of ID.me and an advisor to Paceline. Vic also serves as a Strategic Advisor to IA Capital.

Prior to Energy Capital Ventures, Vic was the Managing Partner of Lightbank where he responsible for managing investments in Clearcover, Extend, Paladin Cyber and BillTrim. At Lightbank, Vic served on the boards of Sprout Social (NASDAQ: SPT), Snapsheet, CarLease.com, Hatch Loyalty (acquired by Mobivity), Udemy, Ionic, Blueprint, Hireology, NuBundle, Fooda and BenchPrep. Prior to Lightbank, Vic built and led USAA's $330 million corporate venture capital program. At USAA, Vic directed investments and served on the boards of Narrative Science, TRUECar (NASDAQ: TRUE), Care.com (NYSE: CRCM), ID.me, Automatic Labs (acquired by Sirius XM), Prosper Marketplace, Personal Capital (acquired by Empower Retirement), Coinbase (NASDAQ:COIN), MX, Roost, Cartera Commerce (acquired by Ebates/ Rakuten), Roostify, RepairPal, Saffron Technologies (acquired by Intel Corp.), CafeX, MindMeld (acquired by Cisco) and VAST (acquired by Vroom).

He also held responsibility for USAA's M&A, joint ventures and intellectual property transactions. While at USAA, Vic served as a Strategy & Transformation Executive where he architected a multi-year, cross-functional, multi-billion-dollar digital enterprise-wide transformation plan. Originally, Vic was counsel to USAA's CIO, CTO, CISO, Chief Fraud Officer and Head of Business Operations. After USAA, he was an Investment Director/Partner with Munich Re Ventures in San Francisco where he was responsible for their investment activities in insurtech including Trov, Super, Slice Labs and Next Insurance. Vic's early career includes leadership positions in Chicago start-ups and law. Within the Chicago tech community, he is a board member of ChicagoNext and P33. Vic served as chairman of the National Venture Capital Association's (NVCA) Education Committee for the Corporate Venture Group and served on the Board of Advisors for the NVCA. Vic has been featured in Andrew Roman's best-selling book "The Masters of Corporate Venture Capital." He has consulted and advised multiple corporations on innovation, venture capital and corporate venture capital.

Zach Knight, Co-Founder & CEO, Blue Forest Conservation

Zach Knight is co-Founder and CEO of Blue Forest. Prior to founding Blue Forest, Zach started his career in finance at Merrill Lynch where he specialized in structured finance. Zach also served as a high-yield and distressed corporate bond trader before leaving Wall Street to pursue an MBA at UC Berkeley's Haas School of Business with a focus on sustainability and environmental investing.

Zach holds an MBA with honors from UC Berkeley and a BA in economics from Cornell. At BFC, Zach leads the outreach program with foundations and the conservation finance community. Zach also leads BFC's engagement with the US Forest Service and the State of California.

A passionate finance nerd, Zach loves digging into new structures, contracts, and anything related to financial engineering. You can find Zach and his family exploring the Sierra during the summer months. Zach is an avid skier and soccer player and considers himself an award-winning chili chef.

Hailey Layrock, Senior SBA Trader, Banes Capital

Hailey Atwill-Layrock analyzes SBA loans for purchase and pooling on the Hanover Securities trading desk. With more than 10 years of experience in the financial industry, she creates SBA pools with unprecedented value and is vital to our team.

John McCartney, Co-Founder, Managing Partner & Head of ESG, Artesian

John co-founded Artesian in 2004 on the belief that innovation in finance and technology can help solve the planet's major challenges. John is responsible for Artesian's alternative investment management business in North America, which includes both VC and Fixed Income businesses. By moving capital for purpose, he is passionate about driving sustainable change and making the world a better place for future generations. Prior to Artesian, John spent 9 years at ANZ Banking Group, where he was Head of International Credit Trading. John received his Bachelor and Master's degrees in Economics from the University of Western Australia and his Certificate in ESG Investing from the CFA Society of the UK.

Kaitlin Bergan, Director, Senior Platform Strategist, Sustainable Investing, BlackRock

Kaitlin Bergan, Director, is a Senior Platform Strategist for the BlackRock Sustainable Investing team, responsible for driving client dialogue, platform growth and commercial outcomes on Sustainable Investing across the US & Canada. The Sustainable Investing team is focused on identifying drivers of long-term return associated with environmental, social and governance issues, integrating them throughout Blackrock's investment processes, and creating solutions for our clients to achieve sustainable investment return. Previously, Kaitlin was a member of BlackRock's Global Product Group, responsible for setting and driving product strategy across asset classes for the firm's institutional clients in the US and Canada.

Prior to joining BlackRock, Ms. Bergan headed Investor Relations at G2 Investment Partners, a New York based hedge fund, where she was responsible for asset raising, relationship management and client strategy. Previously, she held roles in asset management investor relations and communications in London and New York.

Ms. Bergan earned a BA in History, with Honours, from the University of Oxford and she holds an M.Sc. from the London School of Economics. Based in New York, Kaitlin is a mentor with BlackRock's Read Ahead program and serves on the leadership committee of the New York Cares Rising Leaders Council.

Michael Hoverman, Managing Director, Co-Head of Global Partners Group, CIM Group

Michael Hoverman is a Managing Director and Co-Head of the Global Partners Group. He is responsible for building strong relationships with CIM's partners and co-investors. Prior to joining CIM in 2014, Mr. Hoverman was a Vice President of Infrastructure and Real Assets at Macquarie. He earned a Bachelor of Arts degree in Economics and Philosophy from Bates College and a Master of Finance degree in Investment Banking from INSEAD.

Joseph Idaszak, Vice President, Analyst, Brookfield Asset Management

Joseph Idaszak has 9 years of industry experience and is a Vice President on the Public Securities Group's Infrastructure Securities team. Joseph is a dedicated research analyst for the Global Renewables & Sustainable Infrastructure team. He is also responsible for covering North American and European infrastructure securities focusing on the Utilities, Renewables, Clean Technology and Social Infrastructure sectors. Prior to joining the firm in 2016, Joseph was an Investment Associate at Silverpath Capital Management where he focused on Renewables, Utilities and MLPs. Prior to that, he was an Investment Banking Analyst at Goldman, Sachs & Co. where he focused on Renewables, Clean Technology, Industrials and Healthcare. Joseph earned a Bachelor of Business Administration degree from the University of Notre Dame.

Yazann Romahi, CIO, Asset Management Solutions, Quantitative Solutions Group, JPMorgan Asset Management

Yazann Romahi, PhD, CFA, managing director, is CIO for AM Solutions – Quantitative Solutions focused on managing and developing the firm's systematic and factor-based franchise across strategic beta and thematics. He is also responsible for leading the firm's Multi-Asset Quantitative Research capabilities. Prior to joining J.P. Morgan in 2003, Yazann worked as a research analyst at the Centre for Financial Research at the University of Cambridge and undertook consulting assignments for a number of financial institutions including Pioneer Asset Management, PricewaterhouseCoopers and HSBC. Yazann holds a PhD in Artificial Intelligence from the University of Cambridge and is a CFA charterholder.