



THE PATH TO SUSTAINABILITY

The Sanfilippo Foundation and The Klaas Group of UBS Financial Services team up with financial experts and local charities to drive the sustainability conversation in Barrington

ABOVE: THE KLAAS GROUP MEMBERS ARE (FROM LEFT) JOHN KLAAS, JR., SR. VP, WEALTH MGMT.; KAROLINE O'CONNOR, SR. WEALTH STRATEGY ASSOC.; THOMAS KRET, SR. VP, INVESTMENTS; BENJAMIN BROWN, ACCOUNT VP; DAVID MILLINGTON, SR. VP, WEALTH MGMT., KATHLEEN MILLER, CLIENT SERVICES ASSOC.; ALEXANDER KLAAS, FINANCIAL ADVISOR; AND STEVEN CONNOLLY, SR. VP WEALTH MGMT.

BY LISA STAMOS | PHOTOGRAPHY BY LINDA M. BARRETT

ON THURSDAY, MAY 18, the doors of the Sanfilippo Estate opened to welcome guests to learn more about sustainable investing with expertise from The Klaas Group at UBS in Barrington. Driving a sustainability conversation that is designed to pull local organizations together and benefit local charities at the same time, the event covered topics including the environment, filling the unmet needs of children in the local school district, as well as the benefits of investing with sustainability in mind. Tesla was also on hand to discuss its newest model and its venture into the home energy market with renewable energy roofing materials. Guests were invited to test ride in Tesla autos after the seminars. A buffet dinner was provided to guests who mingled and networked after the full day of seminars and idea sharing. Here's a look at some of the interesting take-aways from the event.

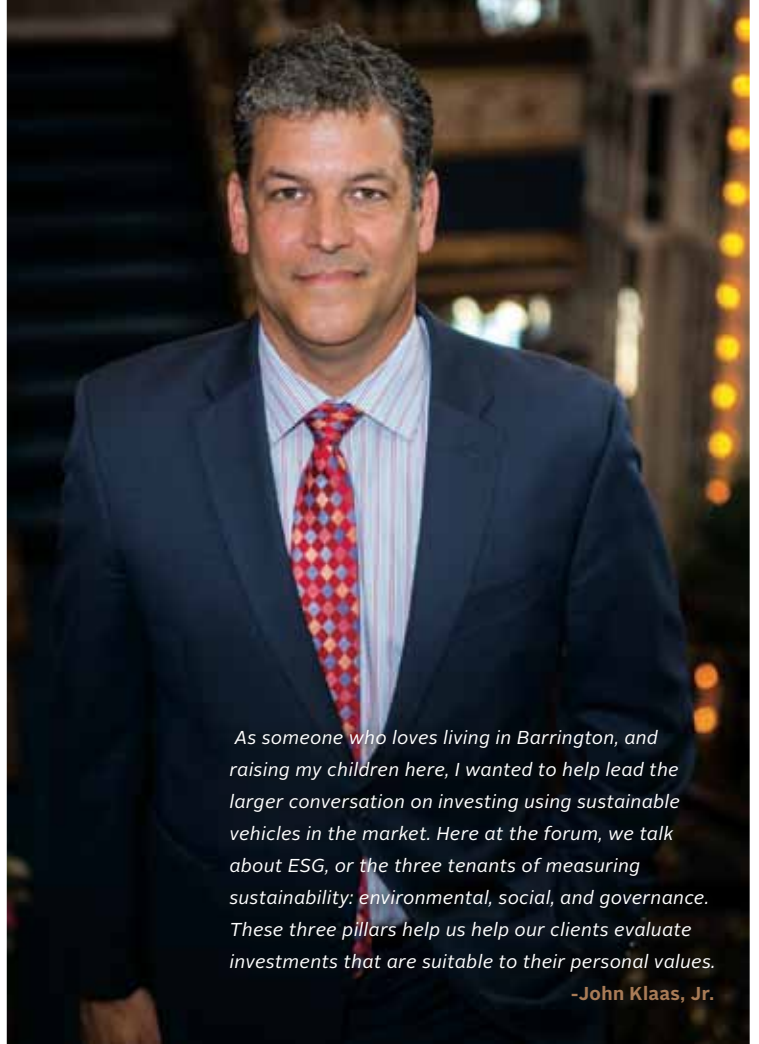


GREGORY LEIFEL OF THE SANFILIPPO FOUNDATION, HOST OF THE SUSTAINABILITY FORUM, WELCOMES GUESTS AND INTRODUCES THE PROGRAM AND SPEAKERS.



The Barrington Children's Charities is defining strategic initiatives to sustain our most precious resources, our children. Areas such as perpetual child hunger, dental needs, and mental health support are focuses of the organization in serving children in the Barrington 220 area. We are currently feeding 600 students per year to make sure they can focus at school and to meet some of their health needs.

-Darby Hills, Founder, Barrington Children's Charities



As someone who loves living in Barrington, and raising my children here, I wanted to help lead the larger conversation on investing using sustainable vehicles in the market. Here at the forum, we talk about ESG, or the three tenants of measuring sustainability: environmental, social, and governance. These three pillars help us help our clients evaluate investments that are suitable to their personal values.

-John Klaas, Jr.



In 1995, one billion in assets was invested in a way that aligns with people who place a high value on sustainability. In 2014, that number jumped to 6.5 trillion. Last year, 8.7 trillion dollars or one-fifth of all personal investing is intended to seek SRIs—sustainably responsible investments.

-Geoffrey Centner, Executive Director and Market Head, Metro Chicago for USB Wealth Management Americas



Sustainable investing is an overarching concept comprising three approaches: 1) Exclusion, avoiding unwanted exposures, 2) Integration, a combination of sustainability and financial analysis, and 3) Impact Investing, the opportunity to make a difference. We also look at these three integration factors at this level: environmental, social, and governance.

-Joe Elegante, Senior Portfolio Manager of the Sustainable Investors Team



Protecting our natural resources must be part of the overall model for sustainable investing. A major metropolitan market, New York City, saw the future of its watershed and water supply and proactively purchased thousands of acres of land upstate to assure it could run its city for the future with clean, available water.

-Lisa Woolford, Executive Director, Barrington Area Conservation Trust



About nine percent of families keep or grow assets beyond a three-generation period. When it comes to sustainable or philanthropic investing, get to the importance of your “why?” which will help you identify values and build a legacy. To help your family succeed in following their values through investing, include the entire family in the process and find the right kind of accounts to use to manage your financial resources.

-Zach Graumann, Director of Client Philanthropy, UBS and founder of Suit Up



The way that Tesla connects with its clients is to build a direct relationship. Currently, we have retail stores, services centers, and are building out a charging network for people to be able to stop and recharge their Tesla batteries. The Tesla was engineered and built from the ground up with an electric powertrain. It's the first car to source its energy from a battery pack. Tesla is working on bringing its engineering to the home market with products such as roofing materials that help generate and store energy.

-Mike Camacho, Tesla, Chicago North Shore



As a financial institution, UBS plays an important role in the allocation of the capital invested. Across all business divisions, we support our clients with solutions ranging from sustainable investment products to targeted charitable giving. UBS encourages the question: Does my portfolio reflect my values? This helps begin the sustainability conversation.

-Jon Hale, Head of Sustainability Research, Morning Star