

# 4TH CARBON TRADING SUMMIT™

**January 25-27, 2010**  
New York, NY

**Exploring Regulatory Developments and Investment Opportunities across the Carbon Credit Markets**

## NEW FOR 2010:

- Outstanding speaker faculty, featuring 25+ thought leaders
- Interactive roundtable discussions

**Attend and walk away with transformative carbon trading insights, enabling you to:**

- ✓ Prepare for implementing a **cap-and-trade** system and other regulatory changes
- ✓ Evaluate new emerging investment products and services such as **carbon related ETNs and new indices**
- ✓ Hear from leading investors on how to incorporate carbon into your portfolio
- ✓ Identify investment opportunities in new **cleantech technology initiatives**
- ✓ Have a clear understanding of the **Kerry-Boxer Senate Bill, Waxman-Markey House Bill** and outcome of the **Copenhagen Climate Change Summit**

Sponsor:



Media Partners:



## Confirmed Keynote Speakers:

Russell Read  
(former CIO of CalPERS), Senior  
Managing Partner  
**C Change Investments  
Management**

Anne Sheehan  
Head of Corporate Governance  
**CalSTRS**

Nathaniel Keohane  
Director of Economic Policy and  
Analysis  
**EDF**

Jerome Tagger  
Chief Operating Officer  
**UN PRI Secretariat**

## Additional Speaker Faculty:

**Global Environment  
Fund NEW!**

**CE2 Capital Partners NEW!**

**New Energy Fund LP**

**MissionPoint  
Capital Partners**

**Equator LLC NEW!**

**Sindicatum Carbon  
Capital Co.**

**Camco Global NEW!**

**N.W. Bernstein & Associates  
NEW!**

**Natsource**

**International  
Energy Agency**

**National Resources Defense  
Council NEW!**

**Environmental  
Defense Fund NEW!**

**The Nature Conservancy NEW!**

**Friends of the Earth NEW!**

**Environment Northeast NEW!**

**International  
Energy Agency**

**Point Carbon**

**The Climate Group**

**New Carbon Finance**

**The Climate Trust**

# 4TH CARBON TRADING SUMMIT™

January 25-27, 2010  
New York, NY

Dear Colleague,

With US federal legislation looming and the Copenhagen Climate Change Summit taking place in December, 2010 stands to be a transformational year for carbon trading. Climate change has far-reaching consequences on companies across all sectors of the economy as billions of dollars are being invested in energy efficiency, renewable energy and development of low carbon technologies. A regulated US carbon trade system could soar to a trillion dollar market, up from the estimated \$65 billion market in 2008.

This is why Finance IQ is planning this timely conference by gathering experts to discuss and provide advice on the latest in the carbon trading markets. Taking place in New York from January 25-27, 2010, the **4th Carbon Trading Summit** will unite investors and corporations in an exciting interactive forum, delivering best practice case studies aimed at every stage within the carbon trading process. Participants will work to identify the key issues and strategies steering the course of the carbon markets. We will explore the latest US federal policy developments, how to manage carbon portfolios across the institutional and private investor markets, as well as the mechanics of successful projects.

IQPC works closely with experts and past delegates to continuously improve its thought-provoking content. We are proud to bring together leading experts from diverse backgrounds to provide an understanding of the topics and trends most critical to the carbon trading markets.

Please take a few minutes to read through the agenda and visit [www.carbontradingevent.com](http://www.carbontradingevent.com) for the latest information on additional speakers.

Kind regards,

**Jenna Gottlieb**  
Program Director  
T : 212-885-2754  
[jenna.gottlieb@iqpc.com](mailto:jenna.gottlieb@iqpc.com)

*P.S: Don't miss our pre-conference workshops and new interactive roundtables!*

## Attend and Network with Senior Executives From:

- ✓ Pension Funds
- ✓ Investment Banks
- ✓ Hedge Funds
- ✓ Private Equity Funds
- ✓ Venture Capital Firms
- ✓ Environmental Exchanges
- ✓ Brokerages
- ✓ Advisory Firms
- ✓ Law Firms
- ✓ Non-Governmental Organizations

## About Finance IQ:

**Finance IQ**  
a division of IQPC

**Finance IQ**, the financial division of **IQPC**, produces the world's most cutting-edge and strategic financial conferences across the US, Europe, Asia and the Middle East every year, educating almost 5,000 high-level executives annually. Our comprehensive events provide an unbiased, specialized forum where you can discuss the issues most important to you and network with industry leaders.

## Sponsorship and Exhibition Opportunities

Sponsoring or exhibiting at the 4th Carbon Trading Summit is an excellent opportunity for your company to showcase its products and services to an audience of institutional and private investors. For more information on sponsoring or exhibiting at this or upcoming events, please call Mario Matulich on 212-885-2719 or e-mail [mario.matulich@iqpc.com](mailto:mario.matulich@iqpc.com).

## Earn CLE Credits

IQPC will seek CLE accreditation in those states requested by registrants (post conference) which have continuing education requirements. This is subject to the rules, regulations and restrictions dictated by each individual state organization. Application for accreditation of this course or program in all CLE approved states is currently pending. For Financial Aid Policy information and to request CLE credits, please indicate so when calling to register: 1-800-882-8684, or on the online registration form.

# PRE-CONFERENCE WORKSHOPS

Monday, January 25, 2010



8:00-10:30

7:45 Registration for Workshop A-Coffee will be served.

## Carbon Trading 101: Everything you wanted to know about carbon trading, but were afraid to ask

This workshop explains the basics of carbon trading and its impact on your investment portfolios. Join our expert faculty in analyzing trading opportunities and strategies as well as learning how to apply them to the current market. Attending this workshop will offer an educational and practical perspective to successfully navigate carbon trading and add to your bottom line.

### What you will learn:

- Choosing the right partners for your investment needs
- Selecting the most appropriate investment vehicle based on risk profile
- Identifying mistakes commonly made while accessing low-carbon investments

### How you will benefit:

- Becoming a smarter sustainable investor
- Allocating capital with confidence and maximize returns
- Avoiding common pitfalls during the investing process

Workshop Leader: TBA



11:00-1:30

10:45 Registration for Workshop B-Lunch will be served.

## Carbon Offsets 101: Regulation and Increased Opportunities

This workshop will give a detailed understanding of how carbon offsets are created and applied. We will examine the criteria of offsets along with the developments in the regulatory and voluntary markets.

### What you will learn:

- Providing an overview of carbon offsets and reviewing regulatory developments in North America
- Looking ahead in the US markets and preparing for increased opportunities
- Breaking down offset quality fundamentals including additionality and verification

### How you will benefit:

- Hearing about the economic impact of offsets
- Exploring the roles of the voluntary and regulatory markets
- Learning how carbon offsets are determined

Workshop Leader: Shanna Brownstein, Policy Associate, The Climate Trust



2:00-4:30

1:45 Registration for Workshop C

## Carbon Markets During a Challenging Economic Environment

This workshop addresses how investors operate during a difficult financial climate. Discuss the impact of the recent financial crisis on the carbon markets and how investors adjusted.

### What you will learn:

- Discussing whether the chances of a climate deal worsened or improved by the economic downturn
- Determining if there was long-term impact with new carbon investors shying away from the sector
- Investing in clean energy to stimulate the economy as a viable solution

### How you will benefit:

- Learning how to navigate the carbon markets during economic highs and lows
- Becoming a smarter investor
- Learning how investor peers manage risk and look for opportunities

Workshop Leader: TBA



5:00-7:30

4:45 Registration for Workshop D-Dinner will be served.

## Tradable Carbon Credits in the Timberland Market

This workshop will cover how agreeing to conserve forest rather than converting forest land to other uses may also serve to generate tradable carbon credits. Forest lands offer significant opportunities for sequestering carbon as well as limiting additional emissions to the atmosphere from forest land conversion.

### What you will learn:

- Examining how to measure forest carbon
- Exploring new and emerging domestic and international project opportunities
- Analyzing the impact of a globally integrated carbon trading system for forest owners and investors

### How you will benefit:

- Getting an essential update on the policy and regulation affecting the timberland sector
- Hearing the pros and cons of creating a global umbrella framework for REDD under the UNFCCC
- Identifying the key funding avenues and finance mechanisms

Workshop Leader: Lloyd Irland, Lecturer and Senior Scientist, Yale School of Forestry & Environmental Studies

Register now! 1-800-882-8684 or visit [www.carbontradingevent.com](http://www.carbontradingevent.com)

Tuesday, January 26, 2010

8:00 **Registration & Coffee**

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8:45 **Chairperson's Opening Remarks**

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9:00 **Providing a Global Overview of the Carbon Markets**

- Assessing the state of the worldwide carbon markets and emerging opportunities for investors
- Explaining the role of US legislation on the EU-ETS and examining increased trading opportunities in Asia
- Measuring the size of the carbon trading market and forecasting how large it will likely grow

**Norman Bernstein**, Member, **N.W. Bernstein & Associates, LLC**

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10:00 **Washington Update: The Next Steps**

- Learn how expanded emissions reductions will be financed in a favorable regulatory environment
- Forecasting how regional regulations, including California's extensive system, will likely be incorporated into federal law
- Interpreting the language and implications of the Kerry-Boxer Senate bill and the Waxman-Markey House bill on corporations and investors

**Shanna Brownstein**, Policy Associate, **The Climate Trust**

**David Hunter**, Director-US Policy, **International Emissions Trading Association**

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11:00 **Networking Break**

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11:30 **Copenhagen: A New Framework**

- Dissecting the key takeaways from the Climate Change Summit and how they impact investors and corporate bottom lines
- All you need to know about the participation decisions made by the US and interpreting the gravity of those decisions
- Defining the new framework for international cooperation and identifying new markets for investors

**Dirk Forrister**, Managing Director, **Natsource**

**Barbara Buchner**, Energy and Environmental Analyst, **International Energy Agency**

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12:30 **Networking Luncheon**

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1:30 **Following Carbon's Impact in the Corporate Space**

- Pinpointing how Copenhagen's outcomes and the US regulatory environment impact company investment policies and balance sheets
- Identifying investment opportunities in carbon trading for corporations
- Addressing compliance concerns for corporations

**Rick Adcock**, SVP and Director, **Camco Global**

**Andy Stevenson**, Efficiency Finance Specialist, **NRDC**

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2:15 **Maintaining Order Through Oversight**

- Exploring how market oversight mechanisms exist to ensure long term viability of emissions trading
- Weighing the impact of carbon market access rules on the US market
- Debating FERC vs. CFTC: The politics behind which agency will oversee a federal carbon trading system

**Nathaniel Keohane**, Director of Economic Policy and Analysis, **EDF**

**Evan Juska**, Senior Policy Manager, **The Climate Group**

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3:00 **Networking Break**

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3:30 **Interactive Roundtable Discussions**

After a jam-packed day of big picture panel discussions, case studies, and presentations, the Carbon Trading Summit gives you the chance to meet and brainstorm with small groups of your peers during our interactive roundtable discussions. This is a great opportunity to make valuable contacts from your area of interest. Roundtables are led by experienced practitioners. Discussion topics include:

**Roundtable A: Compliance**

**Roundtable B: Trading Platforms**

**Roundtable C: Risk**

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4:30 **Networking Break**

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4:45 **Can Countries Cut Carbon Emissions Without Hurting Economic Growth?**

- Debating the long-term viability of carbon trading and the potential economic impact on the US
- Pinpointing the risks and rewards of a federal system
- Presenting case studies on EU countries and the economic implications of a regulated carbon trading system

**Jerome Tagger**, Chief Operating Officer, **UN Principles for Responsible Investment**

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5:45 **End of Conference Day One**

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# MAIN CONFERENCE DAY 2

Wednesday, January 27, 2010

Carbon Trading Products,  
Trends and Strategies

8:00 **Registration & Coffee**

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8:45 **Chairperson's Opening Remarks**

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9:00 **Assessing the Potential for Cleantech Investments**

- Identifying new technology initiatives and an investor market for solutions
- Learn what to look for when analyzing cleantech companies and their potential
- Examining the hurdles to a product becoming successful

**Russell Read**, Senior Managing Partner, **C Change Investments (former CIO of CalPERS)**

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10:00 **Private Equity Update: Following the Money**

- Tracking where private equity and venture capital dollars are flowing in the US and internationally
- Reviewing the methodology behind private equity firms' investment decisions for carbon
- Examining the highs and lows of investing in a difficult economy

**Gregory Arnold**, Managing Director, **CE2 Capital Partners**

**George McPherson**, Managing Director, **Global Environment Fund**

**Martin Whittaker**, Director, **Mission Point Capital**

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11:00 **Networking Break**

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11:30 **Speculating About Carbon Prices in a New Regulatory Environment**

- Addressing fluctuating carbon prices and measuring the impact on investors
- Debating the impact on other commodity prices
- Predicting how emissions regulation would affect supply, and how corporations would manage those costs and restrictions

**Louis Blumberg**, Director, **The Nature Conservancy**

**Kjell Olav Kristiansen**, Director-Advisory Services, **Point Carbon North America**

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12:30 **Networking Luncheon**

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1:30 **Considering Carbon's Impact on the Timberland Market**

- Measuring the big picture opportunity as forest projects are poised to make a highly anticipated entrance into the carbon market
- Learn how companies utilize the Forest Project Protocol in their business activities
- Considering the opportunities for investors and corporations interested in forestry carbon offsets

**Ellen Hawes**, Policy Analyst-Forestry, **Environment Northeast (ENE)**

**Lloyd Irland**, Lecturer and Senior Scientist, **Yale School of Forestry & Environmental Studies**

**Gerrity Lansing**, President and CEO, **Equator LLC**

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2:30 **Carbon Interest Spurs Additional Indices**

- Exploring what can be deduced from recent trading activity in US emissions products
- Detailing how methodologies come to fruition
- Discussing carbon footprint indices and the options available to investors

**Milo Sjardin**, Head, **New Carbon Finance North America**

**Michelle Chan**, Program Director-Green Investments, **Friends of the Earth**

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3:30 **Networking Break**

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4:00 **Carbon's Role in Pension Funds**

- Understanding how low-carbon investments fit into US pension fund portfolios
- Learn about the specific investment decisions made by the second largest pension fund in the US
- Quantifying the opportunity in the pension fund market and determining whether carbon is a viable option

**Anne Sheehan**, Head of Corporate Governance, **CalSTRS**

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5:00 **Identifying New Products and Investment Strategies**

- Weighing the attractiveness of Exchange Traded Notes and how the product limits risk
- Exploring "Green Bonds" offered by The World Bank, which includes a carbon reduction initiative through combating deforestation
- Learn how hedge funds incorporate carbon-related investments into their portfolios

**Mark Cox**, Managing Director, **New Energy Fund**

**Rob Toker**, Director-Business Development, **Sindicatum Carbon Capital**

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6:00 **Close of Conference**

Register now! 1-800-882-8684 or visit [www.carbontradingevent.com](http://www.carbontradingevent.com)

# REGISTRATION



## REGISTRATION CARD

(Email this form to [info@iqpc.com](mailto:info@iqpc.com) or fax to 646-378-6025)

**YES! Please register me for**

- Conference**       **Workshop(s):**     A    B    C    D

Name \_\_\_\_\_

Job Title \_\_\_\_\_ Organization \_\_\_\_\_

Approving Manager \_\_\_\_\_

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- I cannot attend, but please keep me informed of all future events.

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Our lawyers are mainly nationals of the countries in which they operate. They have a deep knowledge of their market and local legislation. We are bound together by a strong shared ethos and a common professional approach. We aim to get things done, to share our clients' objectives and ambitions. Our primary focus is to achieve for our clients a successful commercial outcome.

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All Access	\$1,899 (save \$2,096)	\$2,499 (save \$1,496)	2699 (save \$1,296)
Workshops	\$549 each	\$549 each	\$549 each

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 ABA/Routing #: 021000021  
 Reference: Please include the name of the attendee(s) and the event number: 12211.004

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