



Robert Patterson, AIFA®

Bob founded Global Fiduciary Consulting LC (GFC) after 30 + years of working with nonprofits and wealthy individuals in the US and Europe in the design, implementation and monitoring of their investment strategies. GFC is an independent firm specializing in the education, assessment and certification of organizations to the Global Fiduciary Standard of Excellence. GFC does not manage money, sell investment products or accept finders' fees/commissions. An affiliated company, Diogenes Fiduciary Technologies, Inc. of which Bob is a co-founder, provides an independent, cloud based resource for the review, assessment and management of fiduciary documents focused on multinationals.



Amongst other roles in the US and Europe, Bob served for 25 years on the Investment Committee of the Episcopal Diocese of Washington, DC, the second largest Episcopal Diocese in the US. Bob helped guide the Investment Committee thru issues related to divestment in South Africa and developed an objective tool for assessing the social impact grants distributed by the Diocese.

Bob is a graduate of the Virginia Military Institute in Lexington, Virginia and obtained his MBA from IMD in Lausanne, Switzerland. Bob continues his interest in a wide variety of areas including veterans' struggles with Post Traumatic Stress and the design and implementation of technology based tools to enhance cognitive awareness and decision-making skills for executives.



Steve Lydenberg, CFA

Steve Lydenberg is Founding Director of the Initiative for Responsible Investment and Partner, Strategic Vision for Domini Social Investments. For over three decades he has been active in the responsible investment field with KLD Research & Analytics and Trillium Asset Management, among other organizations.

He is author of numerous articles and monographs on responsible investment including "Reason, Rationality and Fiduciary Duty" and "On Materiality and Sustainability: The Value of Disclosure in the Capital Markets" as well as several books on responsible investment, including *Corporations and the Public Interest* (Berrett-Koehler) and *Dilemmas in Responsible Investment* (Greenleaf) with Céline Louche. He attended Columbia College (BA, English) and Cornell University (MFA, Theater Arts) and holds the Chartered Financial Analysts designation.

