

Please join us for Our 10th Annual

Market Outlook 2020

Economic Outlook

New Developments with SRI/ESG Investing

Q & A

Monday, January 27 | 5:30 p.m.

Dairy Arts Center | Boulder

RSVP to Sacha.Millstone@raymondjames.com

Vivek Tanneeru, Portfolio Manager with Matthews Asia will join us to share the story of the Matthews Asia ESG Fund he started in 2015. Raymond James added the fund to our platform this year. Vivek's experiences – having been very early in the socially responsible field in this part of the world – are fascinating. Vivek brought ESG investing concepts to Matthews when he joined the firm in 2011. Now, the firm's ESG analyst works with all of the fund managers at Matthews, so her work is having an impact on investment decision making beyond the ESG Fund. He has also been a portfolio manager of the Matthews Asia Dividend Fund since 2014. Vivek was introduced to social investing concepts at the World Bank early in his career after receiving his Master's in Finance from the Birla Institute of Technology & Science in India. He is fluent in Hindi and Telugu.



Vivek Tanneeru
Portfolio Manager
Matthews Asia

Bond portfolio manager, **Sheila King**, was very excited to launch Eagle's suite of ESG fixed income products this year. With more than 30 years of investment experience, Sheila co-manages all of Eagle Asset Management's tax-advantaged fixed income strategies. She will share with us her perspective on the outlook for the economy in the coming year, and the potential impact your portfolio.

When she is not managing bond portfolios, Sheila serves on the Board of Directors for CASA (Community Action Stops Abuse). She is also an avid athlete, having completed Half Ironman and Ironman races and hiked to an elevation above 14,000 feet. Needless to say, Sheila loves Colorado!



Sheila King, CFA
Portfolio Manager
Eagle Asset Management



The Dairy Arts Center | 2590 Walnut (26th & Walnut) | Boulder, CO

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