

INNER CICLE AGENDAS

April 2017

- 5:00 – 5:10 check in
- 5:10 – 5:30 content (topic from the daylong or investment/fund presentation)
- 5:30 – 5:45 Q&A or discussion
- 5:45 – 6:10 sharing of learning/progress/experience/challenges, request for support/advice
- 6:10 – 6:15 closing

May 2017

- 4:30 - 4:45 check in
- 4:45 - 5:00 Kevin Bayuk to present the [Force for Good Accelerator and Fund](#)
- 5:00 - 5:20 sharing of learning / progress / experience / challenges, request for support/advice
- 5:20 - 5:30 closing

June 2017

- 5:30 - 5:45 introductions and check in
- 5:45 - 6:00 presentation about [American Homeowner Preservation fund](#)
- 6:00 - 6:20 homework/ sharing of learning/ progress / experience / challenges, request for support/advice
- 6:20 - 6:30 closing

July 2017

- 6pm - 6:15pm Introductions
- 6:15pm - 6:30pm check-in
- 6:30pm - 7:00pm share about the homework
- 7:00pm - 7:15pm requests for support/ challenges
- 7:15pm - 7:30pm closing

August 2017

- 5:00pm Introductions
- 5:15pm Check-ins
- 5:30pm Presentation by Cat Berman on [CNote](#)
- 5:45pm Update on homework/progress report (see below)
- 6:00pm Challenges and requests for support
- 6:20pm Announcements
- 6:30pm Closing

September 2017

- 6:00pm - 6:15pm Introductions
- 6:15pm - 6:30pm A new approach to portfolio allocation
- 6:30pm - 7:00pm polling the group and discussion

7:00pm - 7:15pm requests for support/challenges
7:15pm - 7:30pm closing

October 2017

5:30pm - 5:40pm Introductions (if needed)
5:40pm - 6:10pm Esther Park to present on Due Diligence
6:10pm - 6:15pm Polling the group and discussion
6:15pm - 6:30pm Financial planning tool
6:30pm - 6:45pm Request for support, questions and discussion
6:45pm - 7:00pm closing

November 2017

5:30pm - 5:40pm Introductions (if needed)
5:40pm - 6:00pm Brian Kaminer to provide an orientation to his website [Invest with Values](#)
6:00pm - 6:10pm *Prudent Woman* concept
6:10pm - 6:40pm Share investing successes and failures and lessons learned
6:40pm - 6:50pm Topics of interest for future calls
6:50pm - 7:00pm closing

December 2017

5pm - 5:15 Welcome and introductions
5:15 - 5:35 Presentation about Northern CA Community Loan Fund by Cat Haward (including Q&A)
5:35 - 5:45 Guided tour of resources on EK4T.com
5:45 - 6:00 Each to share one aligned investment beign considered
6:00 - 6:15 What worked so far? Why? What could make the Inner Circle better? Shall we have a private FB page for our Inner Circle?
6:15 - 6:30 Request for support and closing

January 2018

5:00 Agenda and introductions
5:15 Check ins
5:30 The motivation for my work (EK4T)
5:45 Discuss our attitudes, feelings and intentions around money
6:15 FB live program and brief tour of Slack and website resources
6:25 Closing

February 2018

6:00 Welcome and introductions
6:10 RSF SIF presentation by Kate Danaher
6:30 Check ins - one money success and one money challenge
6:45 Aligned Money Journey
6:55 Closing

March 2018

- 5:00pm Welcome and introductions
- 5:10pm Check-in
- 5:20pm Discussion about using public markets and SRI or ESG funds in our portfolio
- 5:40pm Demo of Censible ESG tool
- 5:50pm Tour of Inner Circle resources
- 6:00pm Expanding the Inner Circle - Open House in April
- 6:15pm Using the Inner Circle to move forward
- 6:25pm Request for support and closing

April 2018

- 5:00pm Welcome and introductions
- 5:20pm Tour of Inner Circle resources
- 5:30pm Discussion about using public markets and SRI or ESG funds in our portfolio
- 5:40pm Demo of Censible ESG tool
- 5:50pm Expanding the Inner Circle - Open House in April
- 6:10pm Using the Inner Circle to move forward
- 6:25pm Request for support and closing

May 2018

- 5:00 - 5:10 Introductions and check ins
- 5:10 - 5:30 David Miller to present Iroquois Valley Farmland REIT
- 5:30 - 5:40 Q&A with David Miller
- 5:40 - 6:00 Review of portfolio management concepts and of investment characterization
- 6:00 - 6:15 Update on goals (see below) and setting new ones
- 6:15 - 6:30 Request for support and closing

June 2018

- 5:00 - 5:10 Introductions and check ins
- 5:10 - 5:30 Brendan Martin to present Working World Fund
- 5:30 - 5:40 Q&A with Brendan Martin
- 5:40 - 6:00 Using somatic tools in our Aware Money Journey
- 6:00 - 6:15 Update on goals (see below) and setting new ones
- 6:15 - 6:30 Request for support and closing

July 2018

- 5:00 - 5:10 Introductions and check ins
- 5:10 - 5:30 Alex McIntosh to present on Thrive Care Products
- 5:30 - 5:40 Q&A with Alex McIntosh
- 5:40 - 5:45 Body check-in
- 5:45 - 6:00 Review what we learned about due diligence
- 6:00 - 6:15 Collaborative plan for doing due diligence on Thrive
- 6:15 - 6:25 Update on goals (see below) and setting new ones

6:35 - 6:30 Closing

September 2018

5:00 - 5:10 Introductions and check ins

5:10 - 5:40 Teams present their due diligence questions and findings

5:40 - 6:00 Due diligence tutorial

6:00 - 6:15 Collaborative plan for completing due diligence on Thrive

6:15 - 6:25 Update on goals (see below) and setting new ones

6:35 - 6:30 Closing

October 2018

5:00 - 5:15 Introductions and check ins

5:15 - 5:30 Wrapping up due diligence exercise on Thrive

5:30 - 6:00 Tax considerations and strategies

6:00 - 6:15 Update on goals (see below) and setting new ones

6:15 - 6:20 Special announcement

6:20 - 6:30 Closing

November 2018

5:00 - 5:10 Introductions and check ins

5:10 - 5:30 Gary Peterson to present CA FarmLink DPO

5:30 - 5:40 Q&A with Gary Peterson

5:40 - 6:00 Update on goals and setting new for December

6:00 - 6:10 Bringing the Inner Circle to a close

6:10 - 6:20 Ideas for our last Inner Circle

6:20 - 6:30 Closing

December 2018

5:00 - 5:10 Introductions and check ins

5:10 - 5:30 Model portfolio based on my own investments

5:30 - 5:50 Presentation by Kevin Egolf of Local Farm Fund

5:50 - 6:00 Q&A with Kevin Egolf

6:00 - 6:10 Bringing the Inner Circle to a close

6:10 - 6:20 What did you get out of the Inner Circle?

6:20 - 6:30 Closing and Gratitude