8:15–8:45 Doors Open — Breakfast

8:45–8:50 Welcome and Intro Nancy Anderson, Executive Director, the Sallan Foundation

9:00–10:00 Panel One
Greening Municipal and Corporate Bonds; Greening Utilities; and Building Investor Confidence

Moderator: Charlotte Kim, Wilson Sonsini Goodrich & Rosati

Speakers:
Mary Barber, Environmental Defense Fund
Joshua Feldman, NRG Energy
Carol Kostik, NYC Comptroller’s Office
Kevin Smith, Goldman Sachs

10:05–11:05 Panel Two
Office and Home Energy Performance Upgrades — Making It To Scale; New York Greens Banking; and Solar Aggregation Heats Up

Moderator: Nicholas Lombardi, Conservation Services Group

Speakers:
Jessica Aldridge, New York Green Bank
Tria Case, CUNY Solar Partnership
Yerina Mugica, Natural Resources Defense Council
Michael Weisberg, M-Core Credit Corporation

11:05–It’s a wrap.
Innovations In Green Finance: Smart Money For Sustainable Cities

Event Sponsor

**Nancy E. Anderson**, Executive Director of the Sallan Foundation, is a life-long New Yorker. After obtaining both her B.A. and Ph.D. from New York University, she served as an environmental advisor in City government for two decades. During that time, she wrote the Community Right-to-Know law, co-authored the recycling law, and helped prevent the sale of the City’s water supply.

Since opening the doors of the Sallan Foundation in 2005, she has worked to advance useful knowledge for greener cities. Making high performance building New York’s “new normal” and seeking sustainable solutions to urban energy needs are among the Foundation’s key campaigns. She writes a bi-monthly “Torchlight” column for the Sallan website and commissions guest op-ed columns and original research. In addition, Dr. Anderson organizes conferences and she lectures on subjects key to the Foundation’s mission.

Panel One Bios:
Greening Municipal and Corporate Bonds; Greening Utilities; and Building Investor Confidence

**Moderator:**

**Charlotte Kim** is a partner in the New York office of Wilson Sonsini Goodrich & Rosati, where her practice focuses on global corporate finance with particular expertise in the energy, healthcare, medical device and other life sciences, retail, manufacturing, and technology sectors. Charlotte has structured, negotiated, and closed more than 150 transactions with a total value exceeding $20 billion. Charlotte specializes in corporate finance, energy efficiency finance, project finance, healthcare finance, and related merger and acquisition transactions. She has extensive experience advising public and private companies, private equity funds, growth and venture capital funds, financial institutions, institutional investors, and multilateral agencies on debt capital structures and financing needs throughout the life cycle of the enterprise, from start-up through operations, acquisitions, joint ventures, restructurings, and investments.

**Speakers:**

As EDF’s Director, New Jersey Clean Energy, Mary Barber focuses on climate and energy in New Jersey. She works with New Jersey’s Office of Clean Energy, the Board of Public Utilities, and the legislature to advocate for EDF’s clean energy priorities and guide the development of policies related to electric grid resiliency in the post-Sandy era. She's also working to expand renewable energy technologies and energy efficiency and implement the finance mechanisms that help fund them.
Before turning her attention to New Jersey, Mary led efforts in New York City to phase out dirty heating oils as part of the successful NYC Clean Heat program, which met its goal of halving soot emissions and led to the city’s cleanest air in over 50 years.

In 2010, Mary launched EDF’s Investor Confidence Project (ICP), a system designed to develop building retrofit opportunities into reliable Investor Ready Energy Efficient™ projects. ICP uses a suite of commercial and multi-family energy efficiency protocols assembled from market best practices to prepare an energy efficiency project for investment. ICP is aimed at increasing investor confidence in energy efficiency and transforming it into an investable asset class with steady cash flow for both investors and building owners.

Prior to joining EDF’s Clean Energy team, Mary was the director of EDF’s NYC Congestion Pricing campaign, a program designed to reduce air pollution, including greenhouse gases, in New York City by decreasing traffic and expanding mass transit.

Mary has extensive experience in New York City government and nonprofit management. She served as chief of staff for a former New York City Council Member where she directed policy and legislative work. Following the City Council, Mary was the director of operations and external relations for a human services organization.

**Josh Feldman, NRG Energy, Inc., Manager, DG Solar M&A**

Josh Feldman joined NRG in 2014 as a member of the DG Solar M&A group. Prior to NRG, Mr. Feldman worked for Safari Energy, a commercial-scale solar developer targeting real estate companies and REIT clients, where he worked in development and project finance. Before entering the solar energy industry, Mr. Feldman worked in business development and asset management for the U.S. arm of Osaka Gas, a Japanese gas utility focused on North American energy infrastructure investments. Mr. Feldman started his career at Alliance Bernstein L.P., a global asset management firm. In all, Mr. Feldman’s roles have covered project development, project finance, acquisition analysis and asset management. Mr. Feldman holds a degree in Physics from Middlebury College.

**Carol S. Kostik** was reappointed **Deputy Comptroller for Public Finance** by New York City Comptroller Scott M. Stringer in January 2014, after having been initially appointed to this position by Comptroller William C. Thompson, Jr. in 2006 and reappointed by Comptroller John L. Liu in 2010. As Deputy Comptroller, Ms. Kostik managed development of the Comptroller’s September 2014 “Green Bond Program for New York City” report and the April 2015 Update to that report, and leads the office’s ongoing Green Bonds initiative. She directs City debt policy and issuance on behalf of Comptroller Stringer for such credits as New York City General Obligation, Transitional Finance Authority and Municipal Water Finance Authority. She also represents the Comptroller on various financing boards. During her tenure, Ms. Kostik has overseen $100+ billion of debt issuance. In May 2010, she received the annual Public Sector Award from the Municipal Forum of New York, an association of municipal securities professionals.
Before joining the Comptroller’s office, Ms. Kostik was Senior Vice President and Chief Financial Officer of the New York City Housing Development Corporation and Chief Financial Officer of the Nassau County Interim Finance Authority, a State authority created in response to Nassau County’s fiscal distress.

Previously, she was a vice president in Merrill Lynch & Company’s public finance department, where she worked with a wide range of issuers in the mid-Atlantic states. She began her career as at New York City’s Department of Housing Preservation and Development.

Ms. Kostik holds a master’s degree in business administration from Stanford University’s Graduate School of Business and a bachelor of arts degree in political economy from Williams College. She was a Governor of the Municipal Forum of New York from 2004-2011 and serves on Manhattan Community Board Three, covering the East Village, Lower East Side and Chinatown neighborhoods, at the appointment of the Manhattan Borough President.

Kevin Smith is a **Vice President within the Environmental Markets Group at Goldman Sachs**, which oversees and supports the global environmental initiatives of the firm. He helps manage the Center for Environmental Markets, which partners with corporate, nongovernmental organizations and academic institutions to further market-based solutions to environmental issues. Previously, Kevin was a Vice President in the Investment Banking Division, as part of a global team focused on delivering the firm’s full capabilities to entrepreneurs, executives and closely held businesses. Throughout his career, Kevin has spent time in both the Investment Banking and Private Wealth Management divisions of the firm. Kevin joined Goldman Sachs in 2004 and holds a Bachelors’ degree from Lehigh University’s College of Business & Economics.
Panel Two Bios:
Office and Home Energy Performance Upgrades — Making It To Scale; New York Greens Banking; and Solar Aggregation Heats Up

Moderator:

Nick Lombardi is a Program Manager for Conservation Services Group, leading their Building Performance Consulting team in New York City, where he advises building owners and property managers on energy efficiency investment decisions, helping them to weigh options, costs, benefits, and priorities. Nick has a broad skill set that includes financial analysis, project and construction management, sustainable design and construction methods and building commissioning, fundraising, and community outreach. Nick has been driving program innovation in the residential sector in New York, piloting new models for reaching and serving homeowners in need of energy efficiency upgrades, and advising commercial building owners and developers on incorporating cost-effective sustainability strategies into their design and operations. Prior to his work at CSG, Nick led the green building and commissioning team at World Trade Center Transportation Hub in Lower Manhattan, integrating sustainable design and construction methods into one of the most complex development projects in history, and was a freelance contributor to Greentech Media covering energy efficiency finance topics.

Nick holds an M.S. in Real Estate Finance from the Schack Institute of Real Estate at NYU, and a B.A. in International Relations from Trinity College in Hartford, CT. He is also a LEED AP.

Speakers:

Jessica Aldridge is a Vice President at New York Green Bank (“NY Green Bank”). NY Green Bank is a $1B state-sponsored investment fund dedicated to overcoming current obstacles in clean energy financing markets and increasing overall capital availability through various forms of financial support such as credit enhancement, project aggregation, and securitization. In her role with NY Green Bank, Jessica supports the origination, evaluation, and execution of scalable clean energy project investments across New York State.

Prior to joining NY Green Bank, Jessica served in the Office of the Secretary at the U.S. Department of Energy, where she helped develop finance and securitization policies to support growth in clean technology adoption. Jessica also worked with PricewaterhouseCoopers (PwC) to identify efficiency projects worth over $1 million in annual energy savings. Previously, Jessica worked in investment monitoring and reporting at Citi Private Equity, a business unit of Citigroup that managed over $10 billion of private equity co-investment, fund of fund, and mezzanine products. Jessica also has experience in single stock and portfolio trading, structured derivatives, and institutional sales in equities at UBS Investment Bank.
Jessica holds a BA in Economics from Columbia University, an MBA with a concentration in Strategy & Finance and an MEM in Energy & the Environment from Yale University.

**Tria Case, Esq.,** is the University Director of Sustainability for the City University of New York (CUNY). Since 2006 Ms. Case has led the development and the implementation of multiple U.S. Department of Energy funded solar programs on behalf of New York City and now New York State, leading to a significant growth in solar capacity and a more than ten-fold increase in installation companies. One of the current focuses of Ms. Case’s work is to identify and addresses soft or 'Balance of System' costs for the implementation and adoption of solar in NYS. This work is being conducted collaboratively through NYSolar Smart, a program Ms. Case developed that is supported by Federal and State Initiatives. In the aftermath of Hurricane Sandy, Ms. Case formed the Smart Distributed Generation Hub, with City, State, and Federal participation, in an effort to integrate solar and DG into emergency power and resiliency deployment. In addition, Ms. Case coordinates and provides resources to CUNY’s 24 institutions of higher education to meet the goal of reducing CUNY’s energy consumption through the Sustainable CUNY Conserves program.

Ms. Case has secured funding for a $1-million dollar revolving loan fund, the Sustainability Investment Fund, which fund supports projects on CUNY campuses producing energy savings and other sustainability benefits. Ms. Case also serves as Vice President of CUNY Ventures Inc., Sustainability Division. Formerly, Ms. Case served as the Director of the office of Environmental Business Services for Empire State Development Corporation and received her undergraduate degree from Union College and earned her J.D. from Brooklyn Law School.

**Yerina Mugica** is Managing Director at the Natural Resources Defense Council’s, Center for Market Innovation (CMI), focusing on green, inclusive, high impact strategies across food, water, shelter and energy. After helping to launch CMI in 2007, Yerina now co-leads CMI in demonstrating new approaches to finance and investment that offer both strong profit potential as well as strong benefits for people and the environment. CMI works together with private and public sector leaders to accelerate the adoption of more resilient, inclusive, and efficient strategies. Yerina’s current suite of projects includes demonstrating the value of energy efficiency in affordable multifamily homes, identifying innovative financing opportunities for green infrastructure solutions and developing strategies that will make our food system safer and more sustainable.

Yerina has over a decade of experience researching, developing and deploying effective strategies to drive better performance at the nexus of business and the environment. Prior to joining NRDC, Yerina worked as a consultant to government and private sector clients and as Director of Product Development for an internet startup firm. Yerina holds an MBA from the University of North Carolina at Chapel Hill with a concentration in Sustainable Enterprise and a BS from Northeastern University.
Michael R. Weisberg founded M-Core™ Credit Corporation in 1992. Prior to commencing the full time operation of M-Core™ Mr. Weisberg served as one of two officers' in-charge of BLT Leasing Corporation in New York City. BLT Leasing is a wholly owned subsidiary of Bank Leumi Trust Company of New York. During his tenure Mr. Weisberg helped grow the portfolio from $30 million to $250 million.

M-Core™ customers include equipment vendors and installers, small to large middle market companies, utilities, municipalities, banks and New York Stock Exchange listed fortune 1,000 companies. M-Core™ has provided financing for energy projects to many multi-family buildings, schools within New York State, and public housing Authorities throughout the country.

Our partners in the energy group include several Utility companies, ESCO’s, Law firms specializing in Energy financing and energy equipment vendors and installers.

In 1996 M-Core™ began an exclusive relationship with Community Bank of Sullivan County (now called Catskill Hudson Bank) to provide equipment financing services to their client base.

In 1997 M-Core™ was chosen to operate Valley Credit Services, for Valley Resources in Cumberland, Rhode Island. Valley Resources is the gas utility in Rhode Island. M-Core™ created and ran Valley Credit Services to provide equipment financing to the Utilities commercial customers.

In 2000 M-Core™ was awarded the privilege to create and operate HVB Leasing Corp. HVB Leasing Corp. is a wholly owned subsidiary of Hudson Valley Bank headquartered in Yonkers, NY. Hudson Valley Bank is a $3 billion plus bank serving the New York Metro area. Michael Weisberg was named an officer and President of HVB Leasing Corporation. In 2007 Mr. Weisberg was named to the Business Development Board of Hudson Valley Bank.

In 2012 M-Core™ was selected to operate the Connecticut Energy Efficiency large Commercial and Industrial Financing Program by the Northeast Utilities (primarily Connecticut Light & Power, United Illuminating and Yankee Gas)

Mr. Weisberg has become an expert on practical everyday real world energy savings related project financing and the NYSERDA Loan Programs. M-Core™ has successfully funded many multi-family buildings including Co-ops, Condominiums and Commercial building energy projects. He sits on several advisory boards including New York City’s Mayor Bloomberg’s Clean Heat Task Force, New York State’s NYSERDA Green Jobs Green New York Advisory Board and NREL’s (National Renewable Energy Lab) Banking on Solar Working Group.