

The Data Behind an ESG Strategy Matters



David Gordon, CFA®, CPWA®
Senior Vice President, Direct Indexing
Vestmark

David Gordon is Senior Vice President, Direct Indexing, responsible for expanding adoption of Vestmark's direct indexing solutions, which enable client-driven customizations around tax management and personal preferences such as ESG for wealth management firms and their clients. David is deeply committed to helping wealth management firms and advisors differentiate themselves with portfolios that can be easily personalized to express their clients' unique needs and preferences.

Prior to joining Vestmark, Mr. Gordon was Director of the Eaton Vance Advisor Institute, responsible for supporting advisors who serve ultra-affluent clients with practice management education and tools for growth. Prior to that, he served as Vice President in the Eaton Vance Wealth Strategies Group, representing the firm's tax-managed index portfolios, structured alpha strategies, managed option programs and concentrated stock solutions. David entered the investment management industry in 1994 as a Financial Advisor.

An army veteran, Mr. Gordon completed his Bachelor of Science degree at the U.S. Military Academy at West Point, and his MBA at the University of Texas at Austin. He holds CFA® and CPWA® certifications.



Ben Leale-Green
Associate Director, Research & Design, ESG Indices
S&P Dow Jones Indices

Ben Leale-Green is Associate Director, Research & Design at S&P Dow Jones Indices (S&P DJI), working in the Environmental, Social and Governance (ESG) Product Management team. This team helps innovate new and support existing ESG indices.

Prior to joining S&P DJI in 2019, Ben worked for the National Employment Savings Trust (Nest) and was responsible for ESG integration across asset classes, thematic research and voting and engagement.

Ben holds the Certificate of Quantitative Finance, an MSc in investment management from the ICMA Centre, Henley Business School, and the CFA ESG Certificate.



Mona Naqvi

**Global Head of ESG Capital Markets Strategy
S&P Global Sustainable1**

Mona is Global Head of ESG Capital Markets Strategy at S&P Global, responsible for the commercial rollout of S&P Global's growing ESG product-suite. Prior to this, Mona was Head of the North American ESG Index business for S&P Dow Jones Indices, where she helped spearhead the launch of the flagship S&P 500® ESG Index and secured partnerships to establish a flourishing ecosystem of ETFs, mutual funds, and derivatives. Mona also served as Director for S&P Global Trucost, advising North America's biggest institutional investors on aligning their portfolios with climate-related frameworks and goals.

Before joining S&P, Mona led the North American presence of the 2° Investing Initiative, a prominent sustainable finance think tank, and served as an Advisor to the Obama Administration on climate policy, helping to execute the strategy around the Clean Power Plan. Prior to relocating to the US, Mona was a Junior Economist at the UK's Bank of England and stood for public office in UK local elections as an Official Party Election Candidate for the Liberal Democrats.

Mona graduated Summa Cum Laude in Government and Economics from the London School of Economics (LSE) and has published extensively on sustainable finance topics. As the 2019 recipient of the FiNext Excellence in Finance Leadership Award, Women in Asset Management Awards' 2021 Index Leader of the Year Award and 2021 Next Generation Leader of the Year, she is a recognized sustainable finance expert, industry educator, and a regular market commentator on ESG investing trends. Mona also serves on the Governance Council of the International WELL Building Institute (IWBI), which aims to bring public health, safety, and wellbeing to the forefront of today's ESG frameworks and standards.