

MEMORANDUM

TO: File Nos. S7-17-22, S7-16-22, S7-10-22

FROM: Diem-Mi Lu – Counsel to Commissioner Jaime Lizárraga – U.S. Securities and Exchange Commission

RE: US SIF: The Forum for Sustainable and Responsible Investment

DATE: June 13, 2023

On June 13, 2023, Commissioner Jaime Lizárraga, Parisa Haghshenas, Brandon Hill, Laura D’Allaird, and Diem-Mi Lu met with the following persons:

- Jonas Kron, Chief Engagement Officer, Trillium
- Kim Gluck, Managing Director, Boston Trust Walden
- Kristen Lang, Dep. Director, ESG Investing, Boston Trust Walden
- Diederik Timmer, Managing Director, Morningstar/Sustainalytics
- Michael Kramer, Managing Partner, Natural Investments
- Bryan McGannon, Managing Director, US SIF
- Maria Lettini, CEO, US SIF

Among the topics discussed were the Commission’s proposed rules on the Environmental, Social, and Governance Disclosures for Investment Advisers and Investment Companies and Investment Company Names, the Enhancement and Standardization of Climate-Related Disclosures for Investors, and the Human Capital Management Disclosure recommendation under consideration by the Division of Corporation Finance.