

MEMORANDUM

TO: File No. S7-10-22

FROM: Katherine Kelly, Counsel to Commissioner Allison Herren Lee

RE: Meeting with the Colorado Forum

DATE: June 22, 2022

On May 11, 2022, Commissioner Lee and her counsel, Katherine Kelly, Andrea Orr, and Parisa Hagshenas met with representatives from the Colorado Forum, including the following:

Name	Title
Ms. Lise Aangeenbrug	Exec. Director, Outdoor Industry Assoc.
Mr. Marco Antonio Abarca	President and Owner, Ready Foods, Inc.
Mr. Bruce Alexander	President & CEO, Vectra Bank
Dr. Jandel Allen- Davis	President and CEO, Craig Hospital
Mr. John Baron	Founder, GBSM, Inc.
Mr. David Barry	President, Pursuit
Mr. John Barry	President & CEO, Wings Over the Rockies Air & Space Museum
Ms. Barbara Baumann	President, Cross Creek Energy Corporation
Mr. Buck Blessing	CEO, Griffis/Blessing
Mr. Matthew Burkett	Founder, Chairman & CEO, The Flyfisher Group
Dr. Rebecca Chopp	Chancellor Emerita, University of Denver
Mr. Robert L. Cohen	Chairman & CEO The IMA Financial Group, Inc.
Ms. Liz Concordia	President & CEO UCHealth
Mr. Mike Davis	Head of School Colorado Academy
Mr. Chris Dinsdale	Co-Chairman Bank of Colorado
Mr. Stanton Dodge	Chief Legal Officer Draft Kings
Mr. Michael Fordyce	Retired: President & CEO Craig Hospital
Mr. Steve Foreman	Founder, LK Capital
Mr. Ken Gart	Partner Gart Companies

Mr. Jerry Glick	Managing Partner Columbia Group LLLP
Mr. Thomas A. Gougeon	President Gates Family Foundation
Mr. Brad Greenwald	Managing Partner Hilltop Venture Partners
Mr. Steven (Steve) C. Halstedt	Co-Founder & Managing Director Centennial Ventures
Ms. Jena Hausmann	President & CEO Children's Hospital Colorado
Ms. Helen Hayes	Founder & CEO, Activate Workforce Solutions
Ms. Jennifer Hopkins	Managing Partner Crescendo Capital Partners
Mr. John Ikard	Board Member, FirstBank Holding Company
Ms. Jane Ingalls	Chief of Staff, Bow River Capital
Ms. Alice Jackson	Xcel Energy Colorado, President
Ms. Lydia Jumonville	President and CEO SCL Health
Mr. Ivo Jurek	Chief Executive Officer Gates Corporation
Mr. Jon Kinning	Chief Operating Officer, EVP, RK Mechanical
Ms. Gail H. Klapper	President, Colorado Forum; Managing Attorney, The Klapper Firm
Ms. Becky Kourlis	Principal, ADR, LLC
Mr. Peter Lauener	President, McWhinney
Mr. Richard W. Lawrence	President & CEO, Colorado Financial Management, LLC
Mr. William (Bill) N. Lindsay	Linday3, LLC
Mr. Roland Lyon	President Kaiser Foundation Health Plan of Colorado
Mr. Tim Macdonald	Managing Partner, Arnold & Porter Kaye Scholer LLP
Ms. Mary McBride	Independent Corporate Director and Corporate Advisor
Mr. Steve McConahey	Chairman SGM Capital LLC
Mr. Rodd Merchant	President- West Region J.E. Dunn Construction Company
Mr. David Miller	CEO, Barton Institute for Community Action

Mr. John E. Moye	Partner Moye White LLP
Mr. Trygve E. Myhren	President Myhren Media, Inc.
Ms. Kathryn A. Paul	Retired, CEO Delta Dental
Ms. Mary Rhinehart	Chairman, President & CEO Johns Manville Corporation
Mr. Chris Richardson	Partner Davis Graham & Stubbs LLP
Mr. Daniel L. Ritchie	Chancellor Emeritus University of Denver
Mr. Dave Ryan	Vice President, The Anschutz Foundation
Mr. David Sadoff	Senior Partner & Managing Director, Boston Consulting Group
Mr. Jesus Salazar	CEO, Prosono
Mr. Harris Sherman	Harris Sherman & Assoc.
Ms. Monica Skok	Managing Director, Region Manager, Intermountain Middle Market Banking & Specialized Industries, JP Morgan Chase
Mr. Mark Smith	Founding Principal, Slifer Smith and Frampton
Ms. Elizabeth (Beth) Soberg	SVP, United Healthcare Networks
Mr. George W. Sparks	President & CEO, Denver Museum of Nature and Science
Mr. Fred Taylor	Partner, Managing Director, Beacon Pointe Advisors
Mr. Kent J. Thiry	Former Mayor of the DaVita Village
Mr. Robert G. Tointon	Chairman, Phelps-Tointon, Inc.
Mr. Stewart Vanderwilt	President & CEO, Colorado Public Radio
Mr. Lee White	Managing Director, Stifel Public Finance
Mr. Ron Williams	Self-Employed
Mr. David Younggren	President & CEO, Gary Community Investment Company (retired)
Mr. Joe Zimlich	Chief Executive Officer, Bohemian Companies
Mr. Steve ErkenBrack	President & CEO of Rocky Mountain Health Plans (retired)
Mr. Jeff Hurd	Director, Ireland Stapleton Pryor & Pascoe, PC
Mr. Jay Seaton	Publisher, The Daily Sentinel
Ms. Sarah Shrader	Owner & Co-Founder, Bonsai Design

Mr. Richard Ballantine	Chairman, Ballantine Communications
Mr. Don Mapel	Chairman, Durango Coca-Cola Bottling Company
Mr. John Wells	Owner/Broker, The Wells Group
Mr. Joe Wheeling	Co-Owner, James Ranch Grass Finished Beef & The Gardens at James Ranch
Ms. Sidney Zink	Owner Emerita Fredrick Zink and Associates, PC
Ms. Leslie Barnes	President & CEO, Parkview Medical Center
Mr. Joseph Bower	Partner/Attorney Banner & Bower, P.C
Mr. Dan DeRose	President & Co-Founder, DD Marketing
Ms. Barbara Vidmar	Chairman, American International Automobile Association (Retired)
Ms. Akasha Absher	Chief Consulting Officer, Syntrinsic Investment Counsel
Mr. Josh Benninghoff	Managing Director, Stifel Nicolaus
Ms. Sue Dorsey	Senior Vice President – Finance, Administration & Impact Investing, Gates Family Foundation
Mr. Jim East	Senior Vice President, Development, Colorado Public Radio
Mr. David L. Eves	Executive Vice President, Group President - Utilities, Xcel Energy
Mr. Charlie Farrell	CEO, Northstar Investment Advisors, LLC.
Ms. Betsy Fordyce	Executive Director, Rocky Mountain Children’s Law Center
Mr. John Hanley "JJ"	Managing Director, J.P. Morgan Private Bank
Mr. William J. Hybl, Jr. "B.J."	President & COO, Griffis/Blessing, Inc.
Mr. Mike Johnston	President & CEO, Gary Community Investment Company
Mr. Steve Katich	Director of Business Development & Government Relations, J.E. Dunn Construction Company
Mr. Tom Kourlis	Consultant, Boston Consulting Group
Ms. Kristin Lentz	Co-Managing Partner, Davis Graham & Stubbs LLP
Mr. Chad McWhinney	CEO & Co-Founder, McWhinney

Ms. Ann Mosso	CFO, The FlyFisher Group
Mr. Andy Mountain	President & CEO, GBSM, Inc.
Mr. Marc Neely	President & CEO, UnitedHealthcare of Colorado and Wyoming
Ms. Stephanie O'Malley	Associate Vice Chancellor, Govt & Community Relations, Univ. of Denver
Mr. Tom Pitstick	Chief Marketing Officer, Gates Corporation
Mr. Mike Ramseier	President, Kaiser Health Plan of Colorado
Mr. Bruce Ray	Associate General Counsel, Johns Manville
Mr. Harris Sherman	Harris Sherman & Assoc.
Mr. Josh Smith	Director, Manna Tree Partners
Mr. Scott Stemberger	Senior Partner and Managing Director, Boston Consulting Group
Ms. Nancy Walsh	VP of Experiences and Partnerships, Denver Museum of Nature & Science
Mr. Paul Washington	Executive VP, IMA Financial Group Inc.
Mr. Edward "Ted" White III	Partner Moye, White LLP

Among the topics discussed was the proposed rule re: The Enhancement and Standardization of Climate-Related Disclosures for Investors.