



About the Speakers – 2022 Financial Education Series



Sam Adams is CEO and co-founder of Vert Asset Management. He also chairs the Investment Research Group. Sam leads the development of new products to help make sustainable investing easier for investors. He has been a featured speaker on sustainable investing at financial advisor conferences in the US, UK, Europe, and Australia. Sam is the author, with Larry Swedroe, of 'Your Essential Guide to Sustainable Investing'. He is an instructor for the College of Financial Planning's Chartered SRI Counselor Program, and is member of the Plan Sponsor Council of America's Investment Committee. Prior to launching Vert, Sam spent 20 years at Dimensional Fund Advisors where he led the European Advisor business and launched the Global Sustainability Core Fund. Sam has a BA in Philosophy from the University of Colorado, Boulder and an MBA in Finance from the University of California, Davis.



Mary Beth Franklin is one of the country's leading experts on Social Security and Medicare. An award-winning journalist and Certified Financial Planner, Mary Beth writes a weekly column on retirement issues for *Investment News*, a publication for financial advisers. She is also author of the ebook, [*Maximizing Social Security Retirement Benefits*](#). In 2016, Mary Beth was honored with a Hero Award from the Women's Institute for a Secure Retirement (WISER) for her efforts to improve retirement security among women. She is also an inaugural member of the Certified Financial Planner Board of Standard's Women's Initiative Council which focuses on improving gender and racial diversity in the financial services profession. She received an EPPY award from Editor and Publisher in 2021 for best business blog. She is a frequent guest on numerous radio and television programs. Her podcast, The Retirement Repair Shop, was launched in 2019 and is now in its fourth season.



Paul Merriman is a nationally recognized authority on mutual funds, index investing, asset allocation and both buy-and-hold and active management strategies. Now retired from [Merriman](#), the Seattle-based investment advisory firm he founded in 1983, he is dedicated to educating investors, young and old, through his regular column at [Marketwatch.com](#), and via free eBooks, podcasts, recommendations for mutual funds, ETFs, 401(k) and more, at his [website](#). In 2012 he created [The Merriman Financial Education Foundation](#), dedicated to providing comprehensive financial education to investors, with information and tools to make informed decisions in their own best interest and successfully implement their retirement savings program. In 2021 he was the recipient of the 2021 James B. Cloonan Award for Excellence in Investment Education awarded by the American Association of Individual Investors (AAII). His Foundation is the co-sponsor, along with Bainbridge Community Foundation and others of the Annual Financial Literacy Series on Bainbridge Island.



B A I N B R I D G E
Community Foundation



Larry Swedroe is Chief Research Officer, Buckingham Wealth Partners, an investment management firm managing about \$20 billion of discretionary and non-discretionary assets. Larry was among the first authors to publish a book that explained the science of investing in layman's terms, "The Only Guide to a Winning Investment Strategy You'll Ever Need." He has authored and co-authored over a dozen books about investing. His recent work, "Your Complete Guide to a Successful and Secure Retirement," was co-authored with Kevin Grogan and published in

January 2019. The second edition was published in January 2021. By the time of his presentation his latest book, "Your Essential Guide for Sustainable Investing: How to live your values and reach your goals with ESG, SRI and Impact Investing," will be available. Larry contributes regularly to multiple outlets, including Advisor Perspectives, The Evidence Based Investor, Alpha Architect, and Seeking Alpha. Larry holds an MBA in finance and investment from New York University, and a bachelor's degree in finance from Baruch College in New York.