

Environmental, Social, and Governance Investing Social Responsibility v. Fiduciary Responsibility



**Christine Zinter, Bullard Law
Heather Van Meter, Bullard Law**

1. What is “socially responsible investing” and “divesting” and how are they different?
2. Why should employers care about socially responsible investing?
 - a. Mission-driven industry
 - b. Employees’ core values
3. How do we find socially responsible investing funds?
4. Aren’t returns lower on socially responsible funds?
5. Will we get sued if you have socially responsible funds in a retirement plan portfolio?
 - a. DOL stance under Trump and Biden
 - b. Long-term stability as a counter to immediate returns

Christine Zinter

Christine Zinter is an associate with Bullard Law admitted to practice in Washington and Oregon.
Christine spent over 20 years working as an employee benefits

consultant until the rollout of the Affordable Care Act inspired to her go to law school. Graduating in 2015 with a Certificate in Health Law from St. Louis University's nationally recognized Health Law Program, her legal experience includes several years as a compliance attorney for a Fortune 100 pharmacy benefit management firm specializing in Medicaid and Exchange products, and more recently as an ERISA and employment law attorney for a small firm in Eastern Washington.

Thrilled to be returned to her hometown of Portland, Ms. Zinter brings with her a wealth of knowledge and experience with employee benefit plan rules and regulations including ERISA, the ACA, state insurance laws and mandates, and the multiple other Federal and state regulations that employee benefit plans are subject to. In addition to health and welfare benefits, Christine's practice covers retirement plans, including pension, profit sharing and other deferred compensation plans, as well as employment law matters particularly concerning the COVID-19 crisis and the continuing promulgation of rules and other guidance from the DOL, CDC, OSHA, and other state specific governing bodies.

In addition to her JD she holds an MBA from the University of Washington, a CEBS designation from the International Foundation, is a member of SHRM, the National Association of Health Underwriters (NAHU), and the Western Pension & Benefits Council. In her spare time, Christine enjoys game nights, travel, and hanging out with her two German Shepherds and way too many cats.

PUBLICATIONS & PRESS

- "Divesting" from Russia: What Employers Should Consider – Bullard Alert, March 2022
- Employer's Responsibility to Withhold New Portland-Based Personal Income Taxes – Bullard Alert, February 2022
- Washington Long-Term Care Tax Officially Postponed – Bullard Alert, February 2022
- Health Plans Required to Pay for Over-the-Counter COVID-19 Tests – Bullard Alert, January 2022
- OSHA Vaccine Mandate Update – Bullard Alert, December 2021
- Déjà vu All Over Again: Employer Vaccine-or-Test Mandate Back on Course (For Now) – Bullard Alert, December 2022
- Federal Contractors' Vaccine Mandate Blocked Nationwide – Bullard Alert, December 2022
- President Biden Announces New Action Plans to Battle COVID-19 Including Mandate that Group Health Plans Cover Free At-Home Testing – Bullard Alert, December 2022
- OSHA Suspends Enforcement of Vaccine Mandate for Employers with 100+ Employees – Bullard Alert, November 2021
- The Cost of Workplace COVID-19 Testing – Dollars and Sense – Bullard Alert, November 2021
- Federal Appeals Court Blocks Emergency Vaccine Rule. What Does This Mean for Employers? – Bullard Alert, November 2021
- Traps for the Unwary Employer with Washington Residents

- as Telecommuters - Bullard Alert, November 2021
- Group Health Plans & COVID-19 Vaccinations: Premium Surcharges Clarified in Time for Open Enrollment – Bullard Alert, October 2021

SPEAKING ENGAGEMENTS

- 2021 Bullard Law Annual Briefing – Bullard webinar, October 2021

Heather Van Meter

A Pacific Northwest native, Ms. Van Meter grew up working at her family's natural resources and retail businesses, as a receptionist and sales clerk then bookkeeper. After earning her M.B.A. and J.D. degrees at Willamette University, Ms. Van Meter spent 22 years in major law firms, teaching, and serving the Oregon Department of Justice. She brings her decades of education and legal experience, an inquisitive mind, and friendly nature to serve our clients.

Ms. Van Meter began her legal career as a big firm associate, becoming a partner at Williams Kastner. She then took advantage of an opportunity to teach in Vietnam, teaching commercial law and company law at RMIT- Saigon. Returning from Vietnam, Ms. Van Meter taught constitutional law and evidence at Lewis & Clark Law School, then spent nearly nine years in the Oregon Department of Justice's Civil Litigation Section, defending the state and its employees in employment, contracts, torts, civil rights, administrative law, and other legal disputes. As a trusted lawyer and trial attorney with over 20 years' experience and dozens of trials and appeals, she has the

knowledge to handle all her clients' needs and a lifetime of wisdom to give practical advice to her clients.

While working as a trial attorney, Ms. Van Meter obtained a Master's degree in human rights law at the University of Oxford, and a Ph.D. in international law at the University of Birmingham (England). She continues teaching to this day, leading graduate school classes in ethics, sustainability, and social responsibility at Willamette University's Atkinson Graduate School of Management. As a professor, Ms. Van Meter has gained the ability to explain complex legal matters in understandable ways.

Ms. Van Meter has been admitted to practice in Oregon and Washington, including Oregon and Washington state and federal courts and the Ninth Circuit Court of Appeals. She has a superb rating with Avvo and is recognized by her peers as a leading trial attorney.

In addition to serving her clients, Ms. Van Meter serves her community extensively and is a past member of the Oregon Government Ethics Commission (governor's appointment), past elected Oregon Bar House of Delegates member, past president of the Marion County Bar Association, past President of Oregon Women Lawyers, past President of the U.S. District Court of Oregon Historical Society, and a former volunteer criminal prosecuting attorney in Hood River County. In her spare time, Ms. Van Meter enjoys spending time with her children and large family, hiking in the great outdoors, and volunteering at her children's school and Girl Scouts.