

# Renewable Energy Accelerator

TREI's Monthly Newsletter

Issue 1, Vol. 1  
February 1, 2010

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- Public Outreach
- Research & Metrics

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- *Conferences and Seminars*
- *Partner Companies*

## What's Next?

- Incorporation
- Resolution
- Education and Outreach
- National Campaign

## Key Personnel

- Ken J. Beitel, Founder and Visionary, Chairman of the Advisory Board
- Elizabeth Helvey, Communications Director
- Crystal Watson, Business Development Director
- Catherine Rein, Chief Operations Officer

## Welcome to The Renewable Energy Initiative!

Accelerating the Clean Energy Revolution one individual at a time...

Enjoy our inaugural issue of the Renewable Energy Accelerator, our monthly newsletter dedicated to educating and informing our partner organizations and those individuals interested in helping fuel the Clean Energy Revolution. Please read on to learn more about TREI's work and how you can join our efforts.

## Who We Are

- The Renewable Energy Initiative is an educational non-profit organization that works to strengthen the American economy, create jobs, and build a healthy environment by increasing renewable energy production, use, and investment. We empower organizations and individuals to create the Clean Energy Revolution through our education, public outreach and research activities.
- Over the next four years our goal is to provide the 50 million Americans with 401(k) plans the freedom to invest in the renewable energy sector. This will generate more than \$150 billion in new investment which will increase clean energy production, drive innovation and speed adoption of renewable technologies. The media launch of the campaign in Colorado on Monday, February 22, 2010 and will encourage other states to follow Colorado's lead and pass their own Renewable Energy Investment Strategy.
- As the organization grows, we'll encourage the rapid adoption of new electric vehicles like the Chevy Volt and Toyota plug-in Prius powered by domestic renewable energy. We'll also encourage homeowners to purchase wind power, or install solar panels.
- One of our catchy and memorable messages is:

***Renewable Energy: INVEST, DRIVE, PRODUCE***

## How Are We Accomplishing This Mission?

- TREI promotes addition of renewable energy sector funds to 401(k)/retirement plans through public outreach, educational activities, and research. Currently, many employers and employees are unaware that renewable energy sector funds exist and are not familiar with benefits of renewable energy investment.
- **Educational Outreach**  
The Renewable Energy Initiative will attend and present at a wide range of conferences, discussion forums and public education events including those focused on sustainability, renewable energy and Human Resource professionals. The Initiative will also host conferences and educational events.

## Mission (Continued)

Through our network of partnerships, we'll contact the largest companies in each state to discuss the benefits adding renewable energy funds to their 401(k) plans.

### ➤ Public Outreach

The Initiative's public outreach program will conduct large scale media outreach and generate significant media coverage. We communicate through social media networks and business and professional journals. We keep local and state governments informed of our work since it often coincides with their economic development efforts. We exhibit at conferences and attend seminars to reach interested corporate and government officials and individuals.

### ➤ Research and Metrics

Our research activities help us measure how effective we are and help us be responsive to questions. We will partner with universities and non-profit research institutes to evaluate our effectiveness. We will study market penetration metrics such as how many employers have added a renewable energy sector fund, how many of their employees have invested, investment activity by cohort, and the performance of the funds used. We will also partner with law firms and other professionals to generate white papers on topics such as Fiduciary Trust to provide key decision makers the information they need to comfortably add renewable energy funds to their 401(k) plans.

## Update

TREI has experienced rapid growth since it began work almost a year ago. Most significantly, State Senator Linda Newell and Representative Joe Rice from the Colorado General Assembly will introduce the **Renewable Energy: Freedom to Choose** resolution on February 22, 2010 to encourage Colorado employers to add a renewable energy sector fund to their 401(k) and other defined contribution plans.

### **Colorado General Assembly's Freedom to Choose Resolution**

In conjunction with the *Freedom to Choose* resolution, the Initiative will launch a large-scale media and outreach campaign to educate individuals and employers about renewable energy investment and the job creation and environmental benefits of this rapidly growing sector. Cohn Marketing, a national marketing and PR firm, has joined the Initiative on a pro bono basis to help with the education and outreach campaign surrounding this announcement and future Initiative activities.

### **HR Briefing Series**

The Initiative also held a series of highly successful briefings around the State of Colorado in the fall of 2009, educating HR and benefits specialists about the ease and benefits of adding a renewable energy sector fund to their 401(k) plans. These briefings, held in conjunction with local Chambers of Commerce, from Colorado Springs to Grand Junction created a base of support around the state for the resolution and for the work of TREI.

### **Conferences and Seminars**

We exhibited at the Colorado Human Resource Association annual conference on January 22, in Denver, attended the fall Colorado Society for Human Resource Management conference in Keystone, and have attended multiple events of the Western Pension and Benefits Conference including the February 2, ERISA Update. HR Directors, plan providers and members of the public are enthusiastic about investing in energy production from renewable sources.

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## **Partner Companies**

Several visionary companies and organizations, recognizing the value of early entry into the renewal energy sector, have supported TREI's work. Based on our educational outreach Vestas Colorado, a prominent Colorado employer, added a renewable energy sector fund to their 401(k) plan of 2000 employees on January 2010.

Other prominent firms and organizations have provided financial and in-kind support for our work through 2009 and early 2010. Supporters include:

- American Portfolios
- TransAmerica Retirement Services
- Great West Retirement Services
- Invesco Power Shares
- Calvert Investments
- Colorado Council, Society for Human Resource Management\*
- Trilogy Financial Services
- Ziegler Wealth Management
- Center T Advisors\*
- Patton Boggs, LLP\*
- South Metro Denver Chamber of Commerce

*\*Denotes Board of Directors*

We greatly appreciate the support of these companies and organizations and their contributions to the Initiative's success.

## **What's Next?**

The next few weeks will be very exciting for The Renewable Energy Initiative! With full-time staff on board, we will greatly accelerate our public and educational outreach including state and national media coverage of this creative and compelling campaign.

### ➤ **Incorporation**

In response to the outpouring of support, TREI has begun the process of incorporating as a 501(c)3 non-profit organization. We should be incorporated by February 5, 2010. Stay tuned for more information about how to make a tax deductible donation to TREI and help drive the clean energy economy!

### ➤ **Resolution**

The Colorado General Assembly will introduce the Freedom to Choose resolution in late February. The TREI staff is working with its partner organizations to prepare a national media launch to announcing this first-in-the-nation renewable energy investment strategy.

### ➤ **Education and Outreach**

Once the resolution passes, the Initiative will greatly expand its Colorado-focused education and outreach campaign with the goal of providing 500,000 Coloradans the freedom to invest in the renewable energy sector through their 401(k) plans over three years. By June, 2010 we will have provided 25,000 Coloradans with the freedom to invest in renewable energy. 100,000 Coloradans will have a renewable energy 401(k) option by the end of 2010.

We are scheduled to attend 3-4 conferences a month either as speakers, exhibitors or both. We work with major Colorado employers and their employees to encourage adding these funds.

## What's Next? (Continued)

### ➤ National Campaign

By early 2011 the campaign will expand to California and Massachusetts. As other states join the effort, we will broaden the campaign, building up to a national program to where Congress will upgrade the 401(k)/defined contribution plan framework to encourage the widespread addition of renewable energy sector funds.

## Background

The Renewable Energy Initiative came from the creative mind of a Coloradan named Ken J. Beitel.

Ken's goal is to rapidly increase renewable energy production through increased investment and increased demand. The concept of providing retirement accounts with widespread ability to invest in renewable energy funds has been developed with extensive research in the financial services sector, along with input from attorneys at Patton Boggs, LLP, and analysis of reports from the Pew Charitable Trust, and the non-profit Employee Benefits Research Institute.

By early 2009, Ken was ready to find a partner organization to help him spread the idea and gain public and business support.

The South Metro Denver Chamber of Commerce, with their Renewable Energy Task Force, lent important early support. The task force provided guidance and support to the then-named "Renewable Energy: Freedom to Choose" campaign.

### **The common sense idea of investing retirement funds in and driving demand for renewable energy has quickly energized many in the Colorado business community.**

Year 2 activities will include launch of the national educational campaign and will lay the groundwork to have the U.S. Congress amend ERISA to encourage the addition of renewable energy sector funds to 401(k) plans. To kickoff its work, the campaign has focused on Colorado, encouraging the General Assembly to pass a resolution encouraging employers to add a renewable energy sector to every 401(k) plan in the state.

The campaign has been an all-volunteer effort through January of 2010. In order to carry out our mission swiftly and effectively, full-time paid staff are needed to enable large scale public and media outreach efforts. Membership, grants and sponsorship discussions with corporations, foundations, and individuals are underway to provide funding for the launch of the innovative and exciting **Renewable Energy Initiative!**

## Key Personnel

- Ken J. Beitel, Founder and Visionary, Chairman of the Advisory Board
- Elizabeth Helvey, Communications Director
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### How Can I Get Involved?

There are many ways to support increased investment in and use of renewable energy.

- Invest in a publicly traded renewable energy mutual fund or ETF. Whether you have an IRA or a 401(k) or similar plan, we can help you navigate through the steps to add a renewable energy fund and invest in one of the fastest growing sectors of the economy.
- Join our campaign. We offer memberships at varying levels tailored to individuals, small companies, and corporate sponsors. Become a member and receive regular updates on the campaign's progress, follow our research and metrics, and know you have helped fuel the Clean Energy Revolution.
- Help spread the word. Tell your employer, your 401(k) plan provider, your neighbor, and your colleagues about this exciting opportunity. Encourage them to consider renewable energy investing and partaking in the rapid growth of the renewable energy sector!

### Please contact us:

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