Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Universität Zürich UZH

Discover Our New Training Course on Impact and Sustainable Investing for Client Retention

We are excited to introduce our latest training course, "**Understanding Impact and Sustainable Investing for Client Retention**," developed in collaboration with the Centre for Sustainable Finance and Private Wealth (CSP) at the University of Zurich.

This in-house training course is an invaluable opportunity for professional advisors seeking to discuss with clients their demand for responsible, sustainable and impact investment solutions while strengthening client relationships and adhering to greenwashing rules.

WHY ATTEND THIS TRAINING:

Align with Consumer Duty: Leverage Consumer Duty and SDR for growth equiping yourself with the knowledge and tools to adopt a values-based, customer-centric model in line with the latest Consumer Duty regulations, these in line with a purpose-driven wealth management business that resonates with clients and drives sustainable growth.

Confidently engage clients on sustainable and impact investment: Learn best practices for addressing the preferences of impact investment clients and discover effective approaches to aligning investment strategies with social and environmental goals, bolstering your reputation as a trusted advisor.

CPD CERTIFIED The CPD Certification Service

CISI Chartered Institute for Securities & Investment ENDORSED CPD

This CPD Certified and CISI Endorsed course provides a comprehensive framework to guide advisors through refining their approach to third-stage client suitability discussions. It equips both your firm and advisors with the necessary tools to enhance client interactions, a pivotal aspect in meeting the Consumer Duty's objectives on customer support and consumer understanding.

You will also receive a certificate from the University of Zurich, Centre for Sustainable Finance and Private Wealth (CSP). The CSP has developed and delivered hands-on science-based trainings for 500+ ultra high net worth individuals UHNWI and 10,000+ wealth managers together with MIT Sloan and the Harvard Kennedy School. CSP offers cutting edge, modular Sustainable Investment executive education based on pioneering research as well as best practices from industry leaders.

By attending this course, you will not only enhance your skills but also position yourself as a leader in ethical and sustainable investing, ultimately fostering deeper and more trusted client relationships.

Learn more about this transformative training opportunity. Get in touch with our team today.

Email: training@philanthropy-impact.org