SUITABILITY TRAINING COURSE

A course developed specially for wealth advisors

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Wealth advisors preparing for changing times Adding value to existing regulated suitability approaches to impact/ESG investing

15 Septmeber 2021 | 9:30am BST

In partnership with

PIMFA
Personal Investment Management & Financial Advice Association

TRAINERS: **John Pepin,** *CEO, Philanthropy Impact*
Heiko Specking, *Founder, specking+partners*

CPD: 180 minutes (3 hours) self-certified CPD points

The trend towards impact/ESG investment is placing suitability issues at the heart of advisor/client conversations. This means moving beyond current discussions with clients about their investment objectives, their financial circumstances and ability to bear risk.
Are you equipped to talk to your clients about their values, motivations, ambitions and goals - capturing their impact/ESG preferences? This training course will allow you to further develop your skills and competencies, putting you in a better position to fulfil your clients' needs, while preparing for potential regulatory change by FCA planning for equivalency with EU MiFID II suitability.

WHY ATTEND:

- Open the door to new *commercial opportunities*
- Receive *exclusive insights* from guest speakers about current industry dynamics and best practice
- Further develop your *skills and competencies* and enhance your business's responsible investment proposition
- Meet your clients' evolving preferences for *investing with positive impact*
- Improve *client engagement* levels and enhance your reputation
- Receive self-certified *CPD points*

KEY LEARNING OUTCOMES

By attending this workshop, you will:

- *Learn* more about the nature and purpose of impact investing/ESG
- *Develop* impactful approaches to addressing a client's values, motivations, ambitions and goals
- *Discover* the benefits of incorporating suitability discussions into practice beyond the current approach
- *Prepare* for meaningful discussions with clients, helping them move from their values to choosing the most impactful approach to their investments

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register for this online self-certified CPD training course please send an email to
zofia.sochanik@philanthropy-impact.org

COST: £450

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT AND PIMFA MEMBERS

Cancellations received in writing 5 working days prior to the event will receive a full refund. It is regretted that cancellations made after this time will not receive a refund.

Philanthropy Impact focuses on inspiring philanthropy and impact investing. Our mission is to grow modern philanthropy and social investment and to encourage impact investing by developing the relevant skills and knowledge of professional advisors to ultra high net worth individuals.

This course is intended for wealth advisors as well as lawyers and other professional advisors with an interest in suitability issues and ESG investing

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