SUITABILITY TRAINING COURSE

A course developed specially for wealth advisors

Philanthropy Impact

Inspiring Philanthropy and Investing for Impact

Maximising Impact/ESG Investment Client Satisfaction – Addressing Suitability Issues.

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

26th July 2022 | 10am BST

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

CPD: 3 certified CPD points

SPEAKER: **TBC**

CISI ENDORSED CPD
CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

The trend towards ESG and impact investment is placing suitability issues at the heart of professional advisor/client conversations leading to enhanced client satisfaction. 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 motivation's 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 related to 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 *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

Summer Sale

Philanthropy Impact is pleased to extend a **HUGE** summer discount of **33%** to all that attend our upcoming summer training session. **For non-member participants the price is currently £300. Whilst members can receive further discounts.**

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register for this online certified CPD training course please click here or send an email to brighton.mazwi@philanthropy-impact.org

COST: £300

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT, PIMFA, CISI AND THE IA 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.

CPD CERTIFIED
The CPD Certification Service

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