SUITABILITY TRAINING COURSE

A course developed specially for wealth advisors

Philanthropy Impact

Inspiring Philanthropy and Investing for Impact

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

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

26 October 2022 | 9:30am BST

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

CPD: 3 CPD points

SPEAKER: **TBC**

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT — ENDORSED CPD

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 ESG/impact investing preferences? This training course will allow you to develop your skills and competencies, putting you in a better position to fulfil your clients' needs. The course can be developed in-house to support firms preparing to implement FCA Consumer Duty rules which will require firms to put their customers' needs at the heart of what they do; as well as preparing to meet potential EU MiFID II suitability regulation equivalency

WHY ATTEND:

- Open the door to new *commercial opportunities*
- 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 essential *knowledge* and be apart of an *ecosystem* which bridges the professional advisory space.
- Receive *3 certified CPD points* and a free copy of the Philanthropy Impact *online handbook*–your go-to resource for delivering an effective philanthropy advice service

KEY LEARNING OUTCOMES

By attending this workshop, you will:

- Learn more about the nature and purpose of impact investing
- Develop impactful approaches to addressing a client's values, motivations, ambitions and goals
- Discover the benefits of incorporating suitability discussions into practice while preparing for FCA Consumer Duty compliance

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: £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.

CPD CERTIFIED
The CPD Certification Service

Our mission: To increase the flow of capital for good by enabling private clients and their families to match their purpose driven wealth strategies with their values, capturing their sustainable, social and impact investment and philanthropy preferences across the spectrum of capital

This course is intended for Private Client Wealth Managers, Investment Managers and the Finance Advice Sector with an interest in suitability issues and ESG/impact investing

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