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.

There is a need for highly specialised training...

...And our suitability training course is designed to deliver just that.

**BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES**

To learn about our online self-certified CPD training and bespoke in-house offerings contact: zofia.sochanik@philanthropy-impact.org

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Philanthropy Impact is a UK charity, focused on inspiring philanthropy and impact investing. Our mission is to grow modern philanthropy and social investment and 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.