SUITABILITY TRAINING COURSE

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

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 THIS COURSE?

- 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* 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

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

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT PARTNERS

CPD CERTIFIED
The CPD Certification Service

LEARN WITH PHILANTHROPY IMPACT

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

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