CPD CERTIFIED The CPD Certification Service

TRAINING COURSE

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 ESG/impact investing

The trend towards ESG/impact 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 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 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

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 certified CPD training and bespoke in-house offerings contact:
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DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT PARTNERS

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT ENDORSED CPD

LEARN WITH PHILANTHROPY IMPACT

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 wealth advisors as well as lawyers and other professional advisors with an interest in suitability issues and ESG investing

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