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.

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: zofia.sochanik@philanthropy-impact.org

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT PARTNERS

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.