



## ESG e-learning modules for investment and finance management

This series of online learning modules provides personnel in the banking and financial services industry the essential ESG know-how in order to advise your clients on ESG topics. Also, they obtain extensive insights on different approaches to integrate ESG into financial products, specifically in the fields of investment and credit management.

The six modules build on each other and allow bank personnel to get a first-hand expertise right from the beginner's level. The first module provides an overview of the ESG philosophy and explains the drivers and challenges of ESG investing. It helps the learners to obtain a general understanding on the reasons why ESG has become so critical.

Module 2 takes a deep dive into the various ESG investing strategies and shows their applicability in practice.

Module 3 explains the key components of ESG loan and credit business in detail, including rating and pricing of ESG risks.

The fourth module gives an overview of international and Swiss regulations, including the ESG guidelines of SwissBanking, FINMA and relevant EU regulations.

With module 5, you deepen your understanding of ESG indicators and ratings and the relevant data requirements in order to come up with a solid analysis.

With the final module 6, you gain an understanding of the ESG concepts of stewardship and engagement and understand how it is put in place in various scenarios.

The modules contain a variety of interactions, including illustrations, graphs, videos, and links to other relevant sources. Learners can enroll at any time and learn time- and place-independent. Also, tests are available to verify their learning progress.

### Your benefit

- Obtain a profound and deep understanding on how trends in ESG influence the world of banking and financial services products and change the behaviors of everyone in business.
- Understand how private and corporate clients should be advised, when it comes to investing funds and financing with an ESG perspective.
- Understand the different ESG concepts and data applied in asset management, including investment strategies and shareholder engagement, as well as financing.
- You meet the current regulatory requirements (e.g. FINMA and self-regulation of SwissBanking).

## Target group

Relationship Managers working in banking, wealth management and other institutions in financial services; specialists, consultants, middle and back office personnel. The modules are suitable for beginners as well as persons with some know how on ESG matters.

## Accreditations

The online modules are accredited by the following institutions as CDP/recertification measures:

United Kingdom: Chartered Institute for Securities & Investment (CISI)

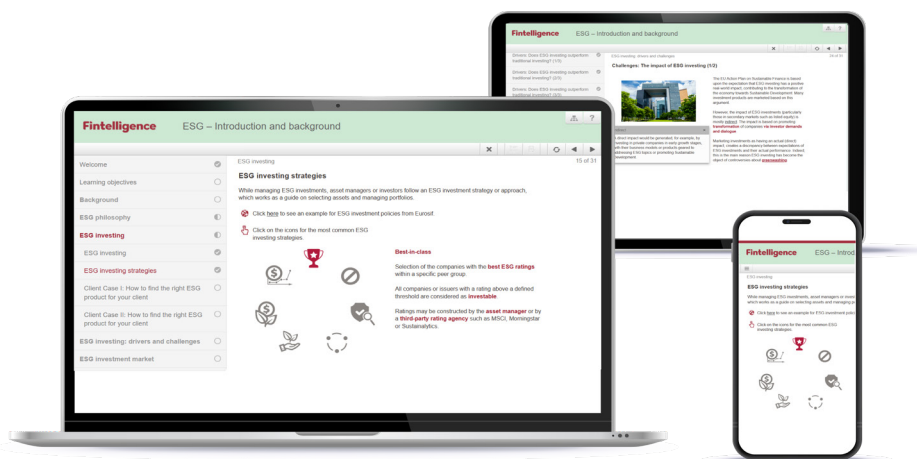
Switzerland: Swiss Association of Quality (SAQ)

Singapore: Institute of Banking and Finance (IBF)

## Content

- The concept and philosophy of ESG and its benefits for the institution as well as for everyone in the business and society
- Drivers and developments of the ESG market
- Trends and different ESG concepts in ESG investments
- ESG investment solutions by various asset classes
- Benefits and challenges of ESG investing
- Incorporation of ESG philosophy, criteria and data into investment decisions
- Stakeholder Engagement, stewardship and investor engagement
- ESG in financing and credit management
- ESG Regulations (Guidelines of Swiss Banking, FINMA and EU Regulations)

## Screenshots of the ESG modules



## About Fintelligence

Fintelligence provides tailor-made and personalized services in personnel and organizational development for financial services providers. In particular, Fintelligence focuses on offering development measures and training for client advisors, team leaders and middle and back office personnel of banks.

Fintelligence is accredited by SAQ (Swiss Association for Quality) for all six client advisor programs, by SAM (Swiss Association of Asset Managers), by CISI (Chartered Institute for Securities & Investment) in the United Kingdom and IBF (Institute of Banking and Finance) in Singapore.

Fintelligence is a registered stock corporation under Swiss law. It is headquartered in Zug, Switzerland. The company has offices in Zurich, London and Singapore.

