



EFFAS

**ESG**®

*Essentials*

## Overview

- ❖ **ESG (Environmental, Social and Governance)** aspects have been increasingly incorporated into investment and financing decision-making processes.
- ❖ According to Regulation (EU) 2019/2088 (SFDR), as of 10th March 2021 participants in financial markets and **financial advisers must report on the integration of sustainability risks** and the analysis of adverse incidences regarding sustainability in their processes and information on sustainability regarding financial products.
- ❖ For adequate advice and transparency on the matter, it is essential that **participants in financial markets** and **advisors and information providers** have a basic knowledge of ESG.
- ❖ Professionals in the sector must demonstrate that they have a **qualification** that **certifies** their experience and training.





# ESG Essentials in Practice

The aim of the programme is to provide **financial advisers** with the **basic concepts** and requirements to **give transparent advice** to retail investors in ESG matters in light of the trends in this area and the requirements of the regulation.

## Who is the ESG Essentials Programme most suitable for?

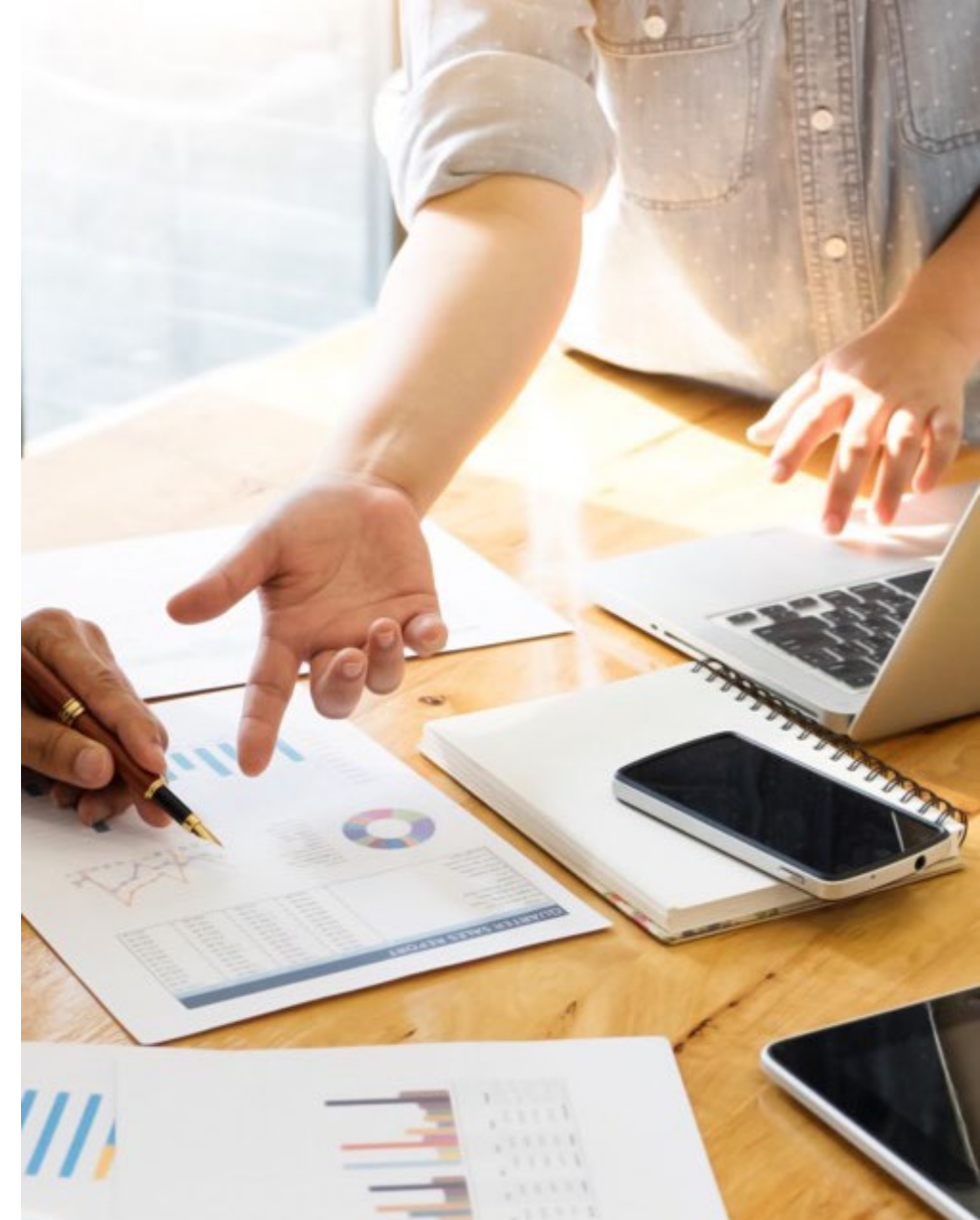
- ❖ Banking and insurance managers / advisers
- ❖ Financial information providers
- ❖ Financial advisers
- ❖ Client advisers
- ❖ Investment advisers
- ❖ Financial planners and specialists in supporting functions in client advisory services



## Learning Outcomes

This programme is designed to provide a thorough understanding of the latest trends in ESG financing. At the end of the programme the student will have a knowledge and understanding of:

- ❖ **Sustainability trends** and their importance for companies
- ❖ What **sustainable finance** is, and its evolution
- ❖ Current regulatory context, with special attention to **Regulation (EU) 2019/2088 (SFDR)**
- ❖ Main **actors** in sustainable finance
- ❖ How ESG matters are integrated into the different asset classes and what **ESG financing instruments** exist.
- ❖ How to recognize **ESG products**, their characteristics and how to explain and advise a client in this type of investment.
- ❖ Investment strategies with **ESG criteria**
- ❖ How **ESG information** is integrated into investment processes





## Programme structure

- ❖ **Sustainability, an overview:** This module is a journey through the evolution of sustainability and what it means for business and investors.
- ❖ **Regulatory context in Europe, implications for investment advisers:** This module offers an overview of the main impacts that regulation will have on entities and on the day-to-day life of banking and management professionals.
- ❖ **Voluntary principles and standards of reference in Sustainable finance:** This module explains the who's who of sustainable finance, who participates as ESG information providers, and the main standards and principles for defining sustainable investment.
- ❖ **Investment instruments and sustainable financing:** This module is a tour through the different investment and financing products and services. Students will receive real examples to understand their characteristics and how to recognize them. They will learn how to explain them to a client and then advise the client accordingly.
- ❖ **Sustainable investment strategies for portfolio construction:** This module allows the student to gain a complete and practical view that will help them to have a deeper understanding and more tools for giving ESG advice.

5 MODULES  
PLUS  
CASE STUDY

## International Certification

The European Federation of Financial Analysts Societies (EFFAS) will grant a professional certification to candidates who pass EFFAS' certification exam organized on a quarterly basis.

In order to take the EFFAS ESG Essentials certification exam candidates must have undertaken a training programme accredited by EFFAS.



**CANDIDATES CAN USE THE  
CERTIFICATION WHEN NETWORKING TO  
GAIN VISIBILITY WITH EMPLOYERS FROM  
AROUND THE WORLD**

1370 certified  
professionals





# Corporate clients

## ESG training for MAPFRE financial advisors at Escuela FEF



MAPFRE, Grupo Caja Rural, Banco Cooperativo Español and Gescooperativo, DZ PRIVATBANK S.A, Amundi are some of the companies trusting in the **ESG Essentials** Programme to train their financial advisors in ESG investing

500 asesores de MAPFRE se certifican en ESG, tras formarse en la Escuela de Estudios Financieros FEF

4 Noviembre 2021 | Categorías: Noticias Corporativas



El Blog ruralvía  
Una iniciativa de Caja Rural

ACTUALIDAD PRENSA SOSTENIBILIDAD

### Escuela FEF formará a los profesionales del Grupo Caja Rural, Banco Cooperativo Español y Gescooperativo para certificarse en ESG

Escuela FEF y Banco Cooperativo Español han llegado a un acuerdo para formar en ESG (Environmental, Social and Governance) a los profesionales que prestan asesoramiento financiero en esta entidad financiera, su gestora de fondos de inversión y el Grupo Caja Rural. Los participantes...

13 abril, 2021 | 976 | 4 min





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The European Federation  
of Financial Analysts Societies

Making a greener  
and better world