

## Introduction to Sustainable Finance

### GOALS

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There are many reasons why sustainability is important to us:

- Improves trust and engagement between staff, investors, customers, and other stakeholders
- Attracts and retain employees
- Builds credibility, improves relationships, and enhances brand awareness
- Reinforce Community Relations
- Encourage Innovation that benefits other measurements
- A better understanding of your customers

Sustainability is increasingly high on the agenda of the financial services industry. Customers ask for it, legislation requires it. Moreover, society is calling on the financial services sector to contribute to a sustainable future. Because of their financing role, banks, insurance companies, private equity and other market parties are seen as crucial factors in the transformation to a sustainable economy.

The goal of this e-learning is for the audience to get a good image on introductory level of what ESG is about, including the context & concept, the relevant framework, and the impact that ESG has on certain groups (banking & insurance).

This course provides an overview of an ESG framework and how it supports a company's overall risk management. It examines each component in detail and provides insight into how they converge to impact a company and its stakeholders. The course also discusses how to look at corporate pressures & stakeholder expectations and their impact on risk identification and business success.

### SUMMARY

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#### Category:

- Risk, finance & treasury
- Durability

#### Difficulty level:

Basic

#### Certification type:

E-learning

#### Price:

- Member: € 370.00
- Non member: € 415.00
- Partner BZB: € 370.00
- Incompany: custom tailored, prices on demand

#### Points/hours:

- Bank: **6**
- Assurance: **6**
- Compliance: **6**
- Mortgage loan credits: **6**
- Consumer load credits: **6**

### Accreditations:

- 600.013 permanent education banking
- 700.010 permanent education insurance
- / permanent education compliance
- 500176 permanent education mortgage loans
- 500176 permanent education consumer loans

## INTENDED AUDIENCE

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The training course can be followed by various target groups which are active within a financial institution:

- employees of banks;
- employees of insurance companies;
- employees who encounter investment funds (funds, management company, custodian, transfer agent, distributor);
- compliance staff;
- internal auditors;
- employees of the legal department;
- ...

## FOREKNOWLEDGE

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**Basic level:** mainly teaches theoretical concepts to provide a general overview (introduction).

## CONTENT

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### CONTENT

The E-learning consists of theory, exercises and cases with practical examples aimed at learning in an interactive manner. This E-learning gives you a complete overview through 4 modules. Module 1 & 2 are offered as a package. Module 3A and 3B are optional and can also be taken separately.

The prices are as follows:

	Price members	Price non-members
Module 1+2+3a+3b	€370	€415
Module 1 + 2	€220	€250
Module 3a or 3b	€120	€145

- **Module 1 Context and concepts** (duration 90 minutes)(level basic)
  - The basic principles of ESG are highlighted and discussed. We take a closer look at the EU Action Plan and the EU Green Deal. We examine in detail the regulators and policies at European level and the national directives. We discuss the impact of ESG on the role of financial institutions and the ESG considerations on credit and investment decisions. You will be introduced to the different terms such as double materiality, physical/transition risks, OECD, SDG, PRI, SASB, TCFD,...
- **Module 2 Regulatory frameworks** (duration 90 minutes)(level basic)
  - The specific regulatory framework of ESG for corporates and financial institutions is explained through theoretical content, alternated by interactive exercises.
  - We share an overview of the guidelines NFRD, SFRD, CSRD and we go deeper into the term taxonomy. Where does the EU Taxonomy come from? What is the EU Taxonomy? Who needs to comply and by when? What are the requirements for the nonfinancial and financial undertakings?
- **Module 3A Impact on the function banking sector** (duration 90 minutes)(level advanced)
  - We discuss more in detail the impact of ESG on the banking sector and you within your job. Together we will learn about

what the banking institutions propose in terms of ESG for the banking sector, how they influence your job in the banking sector and why you should take their guidelines into account for your finance profession. We also share insight on how investors are affected by what is happening in the world today, how sustainability is linked to loan portfolios, how the ESG rating framework and scores are used and what the objectives are of integrating ESG in credit analysis.

- **Module 3B Impact on the function insurance sector** (duration 90 minutes)(level advanced)
  - We discuss more in detail the impact of ESG on the insurance sector and you within your job. Together we will learn about what the different regulations for the insurance sector enfold and how they influence your job in the insurance sector. You will learn more about the Solvency II regulation, what the EIOPA advises as an authority, which tools you can use to manage climate risks in insurance and what else you can take into account to mitigate ESG risks in the insurance sector.

Each module has an approximate completion time of 90 minutes hour and consists of a mix of video, theory, exercises, and questions. Module 3A and 3B provide cross-sectional information and are offered separately depending on the emphasis on the banking or insurance domain.

## PRACTICAL INFORMATION

**Total duration of all modules:** 6 hours

**Points per (sub)module:** 1,5 p/u

The E-learning contains video and audio fragments (without subtitles).

Module 1 & 2 are offered as a package. Module 3A and 3B are optional and can also be taken separately. Module 3A and 3B provide cross-sectional information and are offered separately depending on the emphasis on the banking or insurance domain.

The test for each module at the end of the course consists of multiple-choice questions (no guess-correction). For a satisfactory result, you must obtain at least 60% for each module. If you pass, you will receive the certificate proving that you have passed the test and that you have the required technical knowledge. You have two attempts to succeed.

## REGISTRATION INFORMATION

- You register for this E-learning course via the “Register” button.
- In the final step of the registration form, you can choose to pay either online or by bank transfer. Once you have received a confirmation of this registration, we will send you an invoice by email.
- After payment, we will approve your registration and you will receive an email with an activation link to the E-learning course.

## METHODOLOGY

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An ‘**E-learning**’ is 100% self-study. You log in individually on the MyFA learning platform and process, at your own pace, learning content that is provided to you via an interactive presentation. You can follow this online training wherever, whenever and as often as you want. The teaching material consists of a digital format with text, video, images, animations, test questions and/or references to relevant documents and/or websites.

**Type of course:** E-learning

You get access to an interactive module with theory, exercises and questions.

**Course material:**

- Interactive module