The impact of 'Sustainable Finance' on the financial sector

GOALS

Sustainable development has long been at the centre of the European Project. Accordingly, the EU has warmly welcomed the "UN 2030 Agenda" and fully endorsed its implementation. This led to an EU action plan on sustainable finance in 2018, some actions of which have since then already been translated into EU legislation that also apply to the financial sector, including investment firms providing investment advice and insurance distributors offering insurance-based investment products (IBIPs). The most recent EU regulation is the Sustainable Finance Disclosure Regulation (SFDR) Regulation (2019/2088).

In this training, we will give you an overview of the initiatives and the broader regulatory framework on sustainability, as well as delve deeper into exactly what transparency obligations mean and what the impact and consequences of these are for affected companies and financial sector intermediaries.

This training aims to:

- explain the latest initiatives both internationally and at EU level on sustainable finance;
- provide a detailed overview of transparency obligations;
- outline their impact and consequences.

SUMMARY

Category:

- Insurances
- Sustainability

Difficultylevel:

Advanced

Certification type:

Live webinar

Price:

- Member: € 345.00
- Non member: € 375.00
- Partner BZB: € 345.00
- Incompany: custom tailored, prices on demand

CPD hours:

- Bank: **3h** general
- Insurances: **3h** general
- Compliance: **3h**

INTENDED AUDIENCE

This training course can be followed by various target groups working within the financial sector as, among others:

- managers and employees of legal services;

- compliance officers and employees;
- managers and employees of commercial department/marketing;
- managers and employees financial reporting;
- financial intermediaries offering investment advice.

FOREKNOWLEDGE

Advanced level training: this training requires a general basic knowledge of the subject.

CONTENT

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- Introduction: the impact of sustainability on the financial sector
- UN 2030 Agenda
    - EU Action Plan on Sustainable Finance
        - The Green Deal
        - Key themes
            - Taxonomy (what? why? impact?)
            - SFDR (what? why? impact?)
            - Product portfolio classification
            - NFRD (Non-Financial Reporting Directive)
            - CSRD (Corporate Sustainability Reporting Directive)
            - ESRS (EU Sustainability Reporting Standard)
            - Transparency
            - Benchmarks
    - Integrating sustainability in advisory services
        - Obligation to provide investors with information on
            - How they integrate sustainability risks into their investment process
            - How they consider any adverse effects on sustainability
        - EU Action Plan
        - Key concepts within the framework of MiFID II & IDD
        - EIOPA Directive on integrating sustainability preferences into suitability assessment
        - European ESG Template (EET)

PRACTICAL INFORMATION

- **Duration:** ½ day of training (3 class hours)
- **Hours:** 09:00 to 12:30
- **Language:** This training will be given in English
- **Location:** This training will be given online.
- **Additional information:** How do you start the webinar? You will receive a login and password by email to access our platform. In the platform you will find a link. By clicking on the scheduled date the webinar will start via Webex or Teams. In order to receive CPD hours, it is important to enter your own name and surname, follow the entire training day and answer the questions suggested by the trainer. Do not follow the training with several people on the same PC.

METHODOLOGY

You follow a '**Live webinar**' digitally in a group. It is 'learning-apart-together'. At an agreed time, the teacher and participants log in to a video conference tool, each from his or her own location and with his or her own computer. Via this tool's camera, microphone and chat function, there is an opportunity for interaction and feedback, both from the participants to the teacher and vice versa. The teaching material consists as a basis of a presentation via the MyFA learning platform, supplemented with various other items (such as digital syllabus, presentation, audiovisual fragments, etc.).

Training material:

- PowerPoint presentation (slides);
- Live video.

Insurances: The training concerns technical knowledge related to the various insurance branches, in accordance with art. 270 of the law of April 4, 2014.