

Certificate in Applied ESG Investment & Advisory

5, 7, 12, 14, 19, 21 JULY 2023 | IN-PERSON & VIRTUAL

PROGRAMME

Sustainability is essential to long-term value creation, and will be key to delivering forward-looking and resilient portfolios. But how can you cut through the noise and deliver practical, applied ESG solutions while also achieving risk-adjusted returns? The integration of Environmental, Social, and Governance (ESG) considerations into financial decision-making can be of mutual benefit to investors seeking long-term risk-adjusted returns as well as to a wider set of stakeholders seeking to ensure that finance is aligned with the broader interests of society at large.

Going beyond understanding the fundamental concepts on ESG, the course requires participants to put sustainable investing techniques into practice by implementing portfolio construction and security selection methods. This allows participants to evaluate hypotheses and accepted techniques in sustainable investing.

To achieve climate neutrality or net-zero emissions, many corporations have set targets, but assessing both physical and transitional risks is necessary to determine the path towards net-zero. This program aims to address these challenges and assist investors in aligning their portfolios with the risks and opportunities that arise from climate change. Participants will gain a comprehensive understanding of the ongoing changes, enabling them to develop effective investment and corporate strategies to tackle the challenges of climate change.

CURRICULUM

This programme is specifically designed for wealth management professionals, client advisors and investment counsellors with over three years of experience serving Family Offices or Ultra High Net Worth Individuals (UHNWI). Participants will learn to identify ESG considerations and structure ESG investment strategies, incorporating them into their wealth planning practices.

Learn how to:

- Define the purpose and benefits of incorporating ESG considerations in an investment portfolio.
- Design and advise on investing strategies that are aligned to business and stakeholder ESG objectives and overall investment roadmaps.
- Develop and operationalise asset stewardship, governance and evaluation methodologies to assess sustainable investment strategies, decision-making and actual ESG impact.
- Apply ESG reporting frameworks for communication, disclosure and engagement with stakeholders.
- Develop a strategy to identify climate-related risks and opportunities.
- Identify management and governance strategies that can help to mitigate the identified risks.

Enhance your impact by developing proficiency in the areas of ESG landscape, applied investment advisory, and climate change and sustainability.

FACULTY



Professor Satyajit Bose

Lead Faculty for ESG and Sustainable Investing, WMI
Professor of Practice, Columbia University, Earth Institute

Satyajit Bose teaches sustainable investing and climate finance at Columbia University. He is the Associate Director Master of Science in Sustainability Management programme at Columbia's Earth Institute and oversees a number of research projects in sustainability. He is also co-author of (with Dong Guo and Anne Simpson) of *The Financial Ecosystem: The Role of Finance in Achieving Sustainability*. Prior to joining the University, Satyajit was an M&A banker, directed quantitative trading strategies at a convertible arbitrage hedge fund and developed machine learning algorithms to optimise weather-based decision tools.

FEES & FUNDING

This programme is pending accreditation by The Institute of Banking and Finance (IBF) under the IBF Standards Training Scheme* (STS). Singaporeans and Permanent Residents are eligible for enhanced funding support under the revised IBF funding quantum from 1 January 2023.

	Fees <u>before</u> Subsidy (incl. of GST)	Fees <u>after</u> IBF Subsidy (incl. of GST)	
		Singaporean Age Below 40 / PR (50% IBF-STs Funding)	Singaporean Age 40 & Above (70% IBF-STs Funding)
Application Fees	\$85	Company-sponsored & Self-sponsored \$85	Company-sponsored & Self-sponsored \$85
Tuition Fees	\$5,508	\$2,958	\$1,938

CONTACT US



Scan the QR code to register.
For any enquiries, please email us at RSVP@wmi.edu.sg