WEALTH MANAGEMENT INSTITUTE

Certificate in Introduction to ESG Advisory

Eligible for 8 IBF-STS CPD hours	Up to 70% IBF Funding for Singaporeans and Permanent Residents	Complimentary one-year membership to Global-Asia Family Office Circle

Next Intake: 21 March 2024	Wealth Management Institute One Marina Boulevard, #16-01, Singapore 018989	Contact us at rsvp@wmi.edu.sg

The Certificate for Introduction to ESG Advisory is a one-day program that introduces the basic concepts of ESG. Sustainable investments are critical to addressing the energy transition, which has a multi-trillion-dollar capital requirement. UHNW clients and family offices are increasingly demanding that both financial performance and non-financial factors, such as ESG, be considered.

The course articulates the ways in which the integration of environmental, social, and governance (ESG) considerations to your stakeholders. The course also highlights the impact, risk and opportunities that you may consider while making your daily decisions.

Learn from leading experts in the key areas of sustainability and ESG:

- Breaking down **types of ESG investment strategies**
- **ESG Reporting** and Impact Measurement
- **Challenges and risks associated with ESG** that are facing the world and business (including greenwashing)
- **Conduct conversations about ESG challenges** and identify the key solutions to overcoming them

Who should attend

- Asset Managers
- Wealth and Estate Planning Professionals
- Private Bankers and Client Relationship Managers handling UHNW and Family Office segment
- Family Trust Advisors and Consultants
- Private Client Practice Professionals including lawyers, tax professionals and accountants

Enquire Now

or scan to enquire

Wealth Management Institute International
PEI Registration No. 202025818D
Validity: 17 Sep 2020 to 16 Sep 2024

edutrust SINGAPORE
Cert No.: EDU-2-2155
Validity: 18/01/2023 - 17/01/2027

No. 1 Marina Boulevard, #16-01,
One Marina Boulevard, Singapore 018989
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Programmes Offered

Certificate in ESG Landscape and Impact on Businesses
The course provides an introduction to key Environmental, Social and Governance (ESG) concepts and provides an overview of the Sustainable Finance landscape, including key sustainability trends, opportunities, risks, standards, policies and practices. The course articulates the ways in which ESG considerations impact stakeholders, businesses, investors and clients.

- Explain key sustainability trends and social/ environmental risks in the non-financial industries to stakeholders
- Engage customers on their key sustainability-related dependencies, impacts, risks and opportunities in the non- financial industries

Certificate in Sustainable Investment Management
The course provides an overview of the different sustainable investment approaches and products in the construction of a sustainable investment portfolio and explains why both investors and wealth managers should care about ESG factors. The course will also highlight frameworks for assessing the financial impact of ESG factors.

- Explain the different sustainable investment approaches and its application to the organisation's portfolio strategies to customers
- Identify the appropriate sustainable investment concepts that can be applied together, and which may be contradictory
- Research and support the inclusion of sustainability factors in the portfolio construction process

Meet Your Faculty

Ravi Chidambaram
Adjunct Professor of Sustainability, Yale-NUS College
Co-founder, RIMM Sustainability

Ravi is an experienced executive and successful entrepreneur who has built multiple successful businesses over the past 20 years. Ravi spent the first 10 years of his career at global investment banks like Goldman Sachs and Deutsche Bank focused on M&A and capital markets in the telecoms and tech industries. He is an Adjunct Professor of Sustainability at Yale-NUS College, and is the Co-Founder of RIMM, a leading sustainability software tool for sustainability preparation, reporting, assessment, analytics and solutions. He is also Co-Founder of TC Capital, an Asian investment banking advisory firm focused on M&A and growth capital advisory.

Accreditation & Fee Breakdown

The programme is accredited 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.

The fees listed are after IBF-STS funding. Any discrepancies in registration details or failure to meet minimum IBF academic requirements will result in an unsuccessful IBF reimbursement claim and students will be liable for the full tuition fees.

Global-Asia Family Office Circle (GFO Circle) Members are entitled to 10% discount across "Family Office" programmes.

	Full Fees		Fees after IBF subsidy (inclusive of 9% GST)	
	Before GST	After GST	**Singaporeans Aged Below 40/ Permanent Residents** (50% IBF-STS Funding) Company & Self-Sponsored	**Singaporeans Aged Above 40** (70% IBF-STS Funding) Company & Self-Sponsored
COURSE FEES	S$2,000	S$2,180	S$1,180	S$780

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