

Media release

SSF launches a free e-learning tool: a handy primer on sustainable investments for financial specialists

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Sustainable investments are currently very popular both with financial institutions and investors, but not all finance professionals are well versed in this topic. To fill this gap, Swiss Sustainable Finance (SSF) has, in collaboration with the Edmond de Rothschild Group, developed a four-part e-learning tool, available free of charge, that provides detailed explanations of how sustainability creates added value for companies, and consequently for investors as well. SSF is proud to launch an innovative instrument for the targeted training of client advisors and other financial specialists.

A grounding in sustainable investments – in just four 2-hour modules

Banks have recognised the importance of sustainable investments for some time and already offer clients suitable alternatives to conventional investment solutions. The escalating climate crisis and its global consequences have also triggered a surge in demand for appropriate products and services. Many client advisors are therefore keen to broaden their knowledge of sustainable investment solutions and further develop their advisory skills. The e-learning tool "Sustainable investments in a changing world", developed by SSF in collaboration with various other members, sets out the topic in four modules, each two hours long. "Anyone completing the four modules will significantly broaden their knowledge and be better placed able to exploit the opportunities created by the use of sustainable investments," explains Sabine Döbeli, CEO of SSF. Although the main target group is client advisors with banks, other investment specialists or private investors will also find plenty of useful background information on the topic.

Discovering the financial benefit of sustainability and how to work it into client advisory sessions

The e-learning tool sets out the topic in a series of four modules. The first module describes the principle of sustainability using concrete business examples and highlights the benefits from the investor's perspective. The second module deals with the role of investors and asset managers when it comes to encouraging sustainable business practices. The third module explains how financial analysts can integrate sustainability information into their research in order to obtain a more comprehensive picture of companies. The fourth and final module describes how the topic can be introduced into a structured advisory session with the client, and the specific issues that need to be addressed. Jean Laville, Deputy CEO of SSF who oversaw the e-learning tool's development, knows from his own experience the importance of appropriate advisory skills: "More and more customers, whether private or institutional

clients such as foundations, are demanding that banks consider sustainability aspects and want to discuss the relevant topics with their client advisors. Advisors must have the necessary grounding in order to argue credibly when advising clients, and they also need to offer suitable products.” The Edmond de Rothschild Group supported the development of the tool by providing the necessary funding and their long-standing expertise in the field of sustainable investments. Raiffeisen, Vontobel and Zürcher Kantonalbank also made a contribution to its development, which is available in three languages.

Sustainability as a mandatory component of the advisory process for European clients

With the introduction of new legally binding EU guidelines for the marketing of financial products to European clients, product selection in particular is becoming increasingly important. As of next year, binding rules will also come into force for Swiss financial service providers to ensure that the sustainability preferences of European clients are catered for and included in the advisory process. At least for institutions engaged in cross-border activities, competent client advisors with a sound understanding of the topic are absolutely vital. Here the SSF e-learning tool plays a key role. The fact that the tool is now available free of charge – and in German, French and English – not only supports client advisors looking to expand their knowledge in the interests of their own clientele, but is also useful for providers of financial training who are looking to expand their study programmes.

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Additional information:

> SSF e-Learning Tool “Sustainable investments in a changing world.” Access the four modules via the [SSF website](#).

> [Newsletter SSF](#) bimonthly

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Swiss Sustainable Finance (SSF) strengthens the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalysing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites over 120 members and network partners from financial service providers, investors, universities and business schools, public-sector entities and other interested organisations. An overview of Swiss Sustainable Finance’s current members and network partners can be found [here](#).