Certified Impact Advisor Course

Over 80% of investors globally consider sustainability factors in their investments.

Sustainable investing is now more critical than ever. However, many financial advisors and their clients struggle with understanding and implementing these approaches effectively.

Impaakt presents the **Certified Impact Advisor Course,** a comprehensive program designed to empower financial professionals to become experts in sustainable investing.

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Goals and Objectives:

1. Understand the various types of clients (enthusiasts, pragmatists, conservative, sceptics) when it comes to sustainability.

2. Learn how to adapt your messaging and offering for all your clients. Discover risks and opportunities associated with each profile.

3. Understand the difference between ESG and Sustainability, or Financial Materiality and Impact Materiality.

4. Identify opportunities to develop new revenue-generating services for your clients based on the growing demand for sustainable finance.

5. Learn how to generate a portfolio impact report and build an impact portfolio for your clients.

6. Review the current regulation and how it will affect your work as a financial professional.

7. Join a vast network of financial professionals who followed the same program and interact on a daily basis.

Course Overview

1. The Elephant in the Room: Addressing challenges in sustainable finance.

2. Engaging Your Clients: Strategies for effective client communication.

3. From ESG to Impact: Understanding the transition and its impact.

4. Understanding the Ecosystem: Navigating the complex sustainable finance landscape.

5. Sustainability Advisory Services: Developing and proposing sustainable investment solutions.

6. Exam and Practical Assignments: Assessments to reinforce learning and practical application.

Participants will harness Impaakt's cutting-edge data and analytics to complete assignments, ensuring a practical, real-world application of concepts. Additionally, engage in interactive case studies and participate in live Q&A sessions, fostering collaborative learning and enhancing your expertise in sustainable finance.

Program Format:

The course is designed as an immersive learning experience spanning 2-3 hours. Participants engage within a small peer group, fostering interactive discussions and valuable networking opportunities. The course offers a dynamic mix of theoretical insights and real-world case studies.

Through hands-on practical exercises, attendees acquire actionable skills, empowering them to assess investments, evaluate risks, and propose tailored sustainable solutions effectively. This comprehensive format ensures that participants not only gain theoretical knowledge but also the practical expertise needed to excel in the realm of sustainable finance.

Who Should Attend?

This program is geared towards client advisors, relationship managers, and any finance professional in direct contact with customers. The program aims to empower them with the skills and tools needed to engage in tailored sustainability discussions.

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Brought to you by Bertrand Gacon

- Nearly 20 years of experience in the finance industry.
- Specialized in sustainable finance, creating impactful investment offerings in various banks.
- Co-founded Impaakt in 2018 to address gaps in sustainability data quality and relevance.

Registration Details:

Contact **clients@impaakt.com** to secure your spot or register your company/team.

Fee: 1,900 EUR per person.