



Short online course with test and certificate

Sustainable and Responsible Investment



A message from Jersey Finance

*We all have a role to play in ensuring that Jersey supports the global transition to a more environmentally and socially sustainable future. As part of our sustainable finance strategy, **Jersey For Good – A Sustainable Future**, we recognise that training and upskilling are critical to delivering on that responsibility and ensuring our industry's ongoing success. That is why Jersey Finance is pleased to partner with CISI to offer our Members discounted access to the CISI Sustainable and Responsible Investment Professional Assessment. This course is designed to give professionals from across different financial services areas and functions a solid grounding in the concepts and terminology that are key to meeting client requirements in a changing world.*



Key features

- Short course of online self-learning with an certificate when you pass
- Understand the key terminology and issues
- Enhance your employability by demonstrating your competence
- Written by experts for financial services practitioners
- Covers all the fundamental information needed by professionals
- Global perspective and overview of an essential subject
- Can be taken anytime and anywhere on any device
- 6 hours of CPD

Why study this course?

There is more focus than ever before on sustainability, green investment and environment, social and governance (ESG) considerations. There is also increasing emphasis coming from regulators on integrity in this area including anticipated reporting requirements and a need for all professionals to have an understanding of the key concepts with regards to responsible finance. Threats such as climate change and populations growing across the world, only mean that sustainable and responsible investment approaches that seek to consider environmental good and financial return are more in demand. In an investment context, the incorporation of sustainable and responsible investment presents new challenges to traditional portfolio construction. It is, typically, viewed as an investment constraint, but this is not always the case and this Professional Assessment will explain why. It will give the learner an overview of terminology used, explain the use of benchmarks and examine future trends.

This short course is essential learning for anyone wanting to understand the fundamentals of sustainable and responsible investment.

Who are the CISI?

The CISI is the largest and most widely respected professional body for the securities and investment profession in the UK and in a growing number of financial centres globally. Formed in 1992, the CISI has a global community of 44,000 members in over 100 countries. Last year more than 40,000 CISI exams were sat in 81 countries, including 15,000 taken outside the UK.

"I would recommend all professionals take this course. The subject of sustainable and responsible investment is becoming critical and is dominating the airwaves. Those working in the sector will need to learn the fundamentals for regulatory purposes and also to help with driving their client conversations on how to construct suitable portfolios. The content is a deep dive into the main concepts and provides a solid foundation that practitioners can build on in their professional practice."

Robert Howard, Compliance Manager, Client Advisory, Charles Stanley & Co

Who should study this Professional Assessment?

If you are looking for a course that covers what the main definitions are, an understanding of ESG and its integration, greenwashing, what the global developments are and how this might all apply for investors then this Professional Assessment provides an excellent overview. Designed by a global team of experts, this course is relevant for wealth and investment managers advising clients but also those working across other financial services functions, including risk, compliance, asset management, banking, insurance, operations and financial planning. Completion of the course will give you a certificate that you can use to demonstrate your competence in this area.

Gain a certificate to demonstrate your competence in this subject without having to sit a full exam.

Learning materials

This Professional Assessment is an online course that you can study anytime, anywhere and on any device. A mix of interactive content, the course comprises videos, interviews, some reading and extra references and materials that may enhance your learning. The course seeks to give you a comprehensive understanding across a variety of materials. Undertake the learning at your own pace and then take the test at the end when you are ready.

Totally flexible materials - study at your own pace and on any device.

The test

The test at the end of the course should take no longer than 60 minutes. Made up of 30 questions from a broad question bank, it will thoroughly test your understanding. On passing the test, you will receive a certificate which shows your learning has been accredited by a Chartered body. You will have two attempts to take the test to achieve the 75% pass mark. After which, if you are unsuccessful, you will need to re-purchase the course to try to achieve a pass. We are happy to offer a 50% discount for resits of this course.

The course content includes:

- Definitions and terminology
- The crossover with ESG
- Initiatives, standards and guidance
- Global developments
- Regulatory concerns and requirements
- Identifying greenwashing
- Appropriate benchmarking strategies
- Client sustainability objectives
- ESG integration
- The future sustainable and responsible landscape

Purchase this Professional Assessment today

Professionals are encouraged to take this Professional Assessment without delay.

Cost: £100 for CISI members. £120 for non-members
Jersey Finance members should email crm@cisi.org to obtain the CISI member rate discount of £100 per module, quoting 'JFSRIDiscount'

Duration: 6 hours study time, followed by a 60-minute test comprising 30 questions

Pass mark: 75%

Location: Online – accessible anytime and anywhere (as long as you have internet access)

Other learning resources

The CISI also offers a range of other CPD content in the area of responsible finance qualifications, elearning modules, CISI TV videos on demand and a vast library of articles, interviews and features from our members' magazine The Review, which can be accessed here:

cisi.org/responsiblefinance