

## Sustainability in Advisory Services: Adaptation of the MiFID/IDD Guidelines

### GOALS

---

This training focuses on understanding and implementing sustainable advisory practices while aligning with the MiFID/IDD guidelines. Participants will gain insights into the chain of sustainable financing, client preferences, and the challenges posed by market divergence and greenwashing risks.

By the end of this training, participants will:

- understand the key components of sustainable financing and their significance in advisory services (bank & insurance);
- be equipped with strategies to adapt advisory processes to incorporate client sustainability preferences;
- gain insights into tackling challenges posed by market divergence, taxonomy alignment, and regulatory guidelines;
- develop the ability to identify and mitigate risks related to greenwashing in sustainable investments.

### SUMMARY

---

**Category:**

- Risk, finance & treasury
- Compliance & audit
- Durability

**Difficulty level:**

Advanced

**Certification type:**

Live webinar

**Price:**

- Member: € 220.00
- Non member: € 240.00
- Partner BZB: € 220.00
- Incompany: custom tailored, prices on demand

**Points/hours:**

- Bank: 1.5
- Assurance: 1.5
- Compliance: 1.5

**Accreditations:**

- 600.013 permanent education banking
- 700.010 permanent education insurance
- / permanent education compliance

### INTENDED AUDIENCE

---

The training course can be followed by various target groups:

- Financial advisors;
- Investment & insurance consultants;
- Compliance officers;
- Regulatory professionals;
- Asset Managers;
- Anyone involved in providing investment advice and managing client portfolios;
- ...

## FOREKNOWLEDGE

---

**Advanced level training:** this training requires a general basic knowledge of the subject.

## CONTENT

---

### CONTENT

- **Understanding Sustainable Financing and Advisory Practice**
  - Introduction to sustainability in Advisory Services
  - Exploring the chain of Sustainable Financing
  - The role of Investments in Sustainable Development
- **Adapting the Advisory Process to Incorporate Sustainability**
  - Customer information and preferences
  - Formulating relevant questions
  - Providing Sustainable Product Advice
  - Implementing a Portfolio approach
  - Enhancing suitability reports
- **Addressing Challenges and Risks**
  - Identifying market divergence regarding "Sustainable Assets"
  - Navigating taxonomy alignment
  - Analysing divergent guidelines from ESMA and EIOPA
  - Mitigating risks of Greenwashing

### PRACTICAL INFORMATION

- **Duration:** 1 ½ hours of training
- **Hours:** 09:00 to 10:30
- **Location:** This training will be given online
- **Language:** This training will be given in English
- **Additional information:** How do you start the webinar? You will receive a login and password by email to access our platform. In the platform you will find a link. By clicking on the scheduled date the webinar will start via Webex. In order to receive training points, it is important to enter your own name and surname, follow the entire training day and answer the questions suggested by the trainer. Do not follow the training with several people on the same PC.

## METHODOLOGY

---

You follow a **‘Live webinar’** digitally in a group. It is ‘learning-apart-together’. At an agreed time, the teacher and participants log in to a video conference tool, each from his or her own location and with his or her own computer. Via this tool’s camera, microphone and chat function, there is an opportunity for interaction and feedback, both from the participants to the teacher and vice versa. The teaching material consists as a basis of a presentation via the MyFA learning platform, supplemented with various other items (such as digital syllabus, presentation, audiovisual fragments, etc.).

**Training material:**

- PowerPoint presentation (slides);
- Live Video.