University of Zurich[UZH]
Department of Finance

CSP Center for Sustainable Finance & Private Wealth

Sustainable Investing in Wealth Management

Leveraging sustainable investing
to serve private wealth owners better

Hybrid Setting:

March 17th, 18th & 19th, 2025

Online with in-person participation at UZH possible

Start your journey toward impact

Sustainable Investments are becoming mainstream.

But how is the industry shaping up, and do they have any real impact?

95%

of attendees would recommend this course to a friend or colleague

February 2023
course survey results

Sustainable investing in wealth management is a training course for **financial professionals** who need a foundational understanding of **Impact and sustainable finance** to better serve their clients. The Sustainable Investing in Wealth Management training combines cutting edge **academic research** with **practical aspects** of an ever evolving Impact and Sustainable investment sector. In addition to the course content, the training includes opportunities to meet and **network with professionals and peers** from private banks and family offices as well as access to the broader CSP wealth manager community.

We at the Center for Sustainable Finance and Private Wealth have our roots with wealth owners – with deep experience of helping ultra-high-net-worth individuals develop and implement sophisticated **sustainable investment strategies** with impact at their center.

This **16 hour training**, over three half days is designed for professionals from private banks and family offices who advise clients, develop wealth management solutions and products as well as those responsible for moving forward wealth management divisions in the area of **sustainable finance**. This course gives you the tools to leverage the topic of Impact and sustainable investing in order to **build strong client relationships** and become an **industry leader.**

The training is a combination of **theory and practice**, with high levels of interactivity and deep-dives to topics such as:

- What sustainable and impact investing is and how to understand the different investing approaches used to create funds and products
- Understand the Impact and sustainable investing landscape to better understand client needs
- Hear directly from wealth owners about how different investments fit different client profiles
- Be able to interpret ESG and impact measurement data to be able to respond to client questions as well as build better sustainable investment capabilities

This training is **online** with **in-person participation** possible

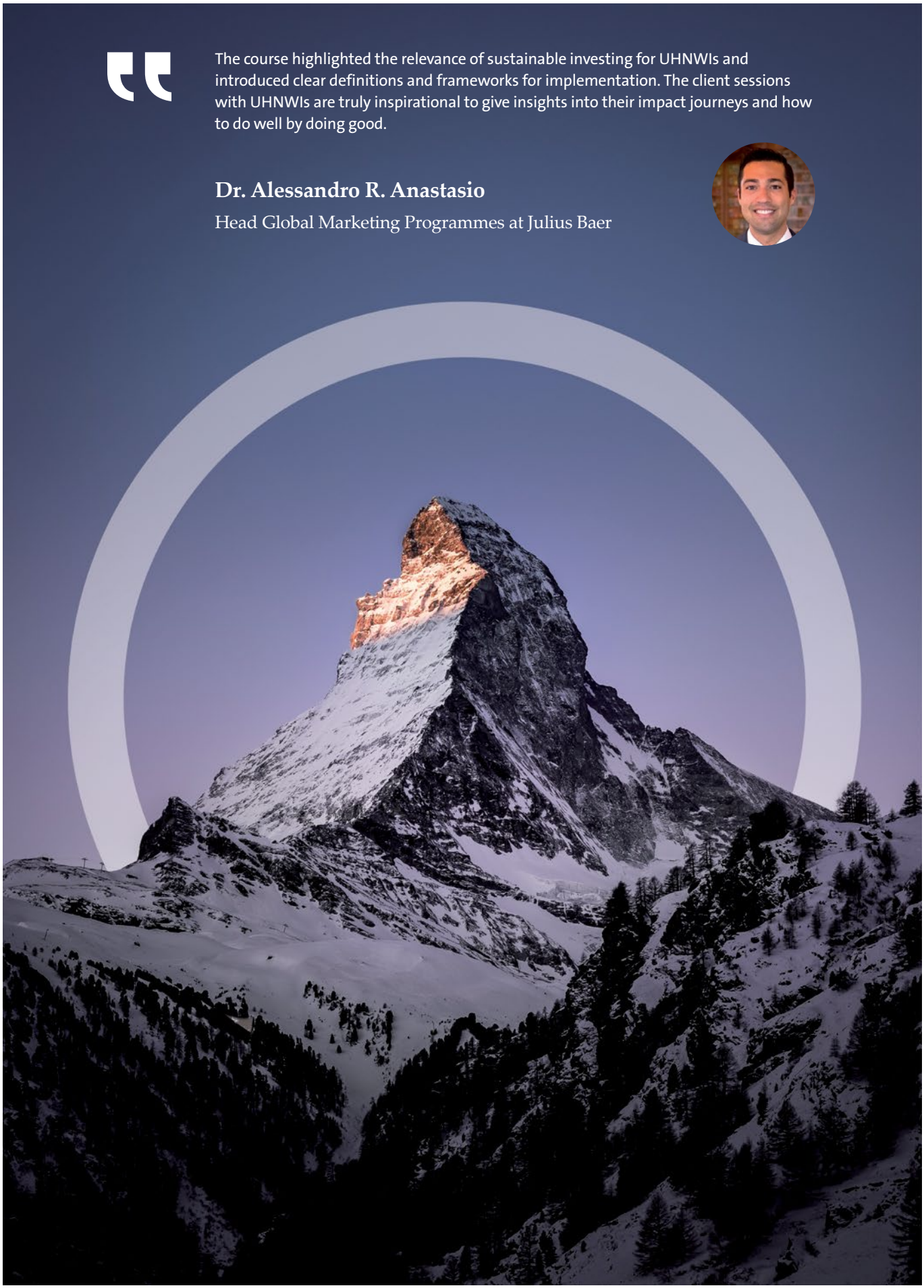
Program Supervisors

Dr. Falko Paetzold

Initiator and Managing Director of CSP at the University of Zurich

Francesca Spoerry

Head of Trainings of CSP at the University of Zurich



The course highlighted the relevance of sustainable investing for UHNWIs and introduced clear definitions and frameworks for implementation. The client sessions with UHNWIs are truly inspirational to give insights into their impact journeys and how to do well by doing good.

Dr. Alessandro R. Anastasio

Head Global Marketing Programmes at Julius Baer

Why

Private wealth owners increasingly appreciate the **support from their advisors** in learning more about sustainable investing – including impact investing, active ownership, thematic investing and impact measurement. Yet, these themes are relatively new and advisors often feel that **they lack the tools** to effectively and efficiently serve their clients herein.

What

This highly curated wealth manager training program has been developed specifically for the needs of **managers, investment professionals and client advisors** of single and multi-family offices and private banks.

The program provides an **interactive**, **engaging** and **practice-oriented experience** that lets participants shape their tools to effectively support clients in bringing **sustainable investments** to their portfolio. The training enables participants to take a **leading position** in the rapidly developing field of sustainable finance.

How

The program is run by **Center for Sustainable Finance & Private Wealth**, a unit at the **University of Zurich** focused on research and training programs directed for **private wealth owners** and **wealth managers** globally. Furthermore, CSP works closely with wealth owner communities such as **Toniic** and **The ImPact**. The program is therefore based on practical expertise from work with wealth owners and managers coupled with **deep scientific research insights**.

The expertise of the research team **extends beyond Zurich** and is based on collaborations with scholars from institutions ranging from the University of Maastricht to MIT and the Harvard Kennedy School.

Who

The core of the program is developed and taught by CSP and external experts brought into the program based on **specific expertise**. The training is also joined by high **net worth individuals** who openly share their perspectives and experiences with advisors.

Previous speakers include:

- **Dr Florian Heeb** Researcher and PostDoc, MIT Sloan
- **Prof. Dr. Falko Paetzold** Initiator and Managing Director of CSP and Professor of Social Finance at EBS Business School in Germany
- **Amandine Favier** Head of Sustainable Finance at WWF Switzerland
- **Carlota Garcia-Manas** Head of Climate Transition and ESG Engagement, Royal London Asset Management
- **Emilie Goodall** Director Sustainable Investing, Fidelity International and Forum for the Future Affiliate
- **Dr. James Gifford** Head of Sustainable and Impact Advisory at Credit Suisse
- **Antonia Sariyska** Sustainable and impact investing at UBS
- **Maddalena Orlandini** Deputy Head Private Markets & Impact Funds Specialist at Julius Baer

The program was a fantastic, interactive experience. I gained knowledge, tools, and practice that have been incredibly valuable to me in day-to-day communication related to sustainable investing with clients and colleagues. The program also gave me the opportunity to make strong connections with other financial professionals dedicated to sustainability. This will be invaluable for years to come.

Lindsey Woodward

Relationship Manager at Abacus

Draft Agenda

This agenda is illustrative and subject to change.

*** This training program is run over 3 days, 5 hours per day between 1pm-6pm CET**

01 Why are the SDG's important, and where does the financial industry play a role?

We have a decade to reach the United Nations Sustainable Development Goals and eight years until the global carbon budget is depleted. Why is the financial industry at the center of all of this?

02 Bringing sustainable investing to the discussion table

An overview of key definitions, frameworks, and approaches to help map various investment products and their impact.

03 Understanding the impact of investing

Where does Investing have positive impact? This session covers which investment approaches and asset classes can yield different sort of Impact.

04 Sustainable investment in the client advisory process

Understand the requirements for recording sustainability preferences and go deeper on profiling clients for their sustainability preferences, then match them with your organization's sustainable investment products and solutions.

05 Global Regulation

Where and how does the regulatory environment enable sustainable investment? What has happened already and what is coming up next?

06 ESG integration deep dive

Bringing light to the jungle of ESG ratings and exploring ways to navigate through the figures, reports, and charts. This session will touch on trends in ESG and how ESG integration as an investment approach can have real world impact.

07 Navigating greenwashing risk

How do the sustainable finance regulations define greenwashing and why regulators pay increasing attention to the topic? What are the practices with high greenwashing risk and how to avoid them? How to mitigate and manage the greenwashing risk? Why is greenwashing prevention essential for the sustainable finance effort?

08 Impact funds in banks

How do impact funds find their way onto banks product shelves and into client portfolios?

09 Why we care: HNW impact investor experience-sharing

What does sustainable investing look like from the investor's point of view and what do (U)HNWIs need in order to embark on a journey toward investing with impact.

What will you get?

01 **16 hours of expert-led training** laying the foundations to be able to guide clients with confidence and competence on sustainable and impact investing topics

02 A **University of Zurich certificate** upon course completion

03 A **digital badge and online credential** to share on LinkedIn with your network upon completion

04 Access to the Sustainable Investing in Wealth Management **alumni LinkedIn Group**

05 Be part of our exclusive mailing list to **access further CSP research and community events** along side UHWN investors, academics and practitioners

06 An optional **30-minute follow-up sustainable investment career call** with a CSP staff member

Example Certificate & Digital Badge


University of Zurich
Department of Finance
CSP Center for Sustainable Finance & Private Wealth

March 8th, 2024

Certificate of Completion
We hereby certify that

Andrew Douglas
has successfully participated in the course

"Sustainable Investing in Wealth Management "
in the framework of the university executive education offering in finance at the University of Zurich
Course duration: March 6th – 8th, 2024

The training included lectures, self-directed study and active participation
SAQ Code: CWMA-UZH-19-3016

Francesca Spoerry
Center for Sustainable Finance & Private Wealth
University of Zurich

Information

Cohort 9: March 17th, 18th & 19th , 2025

Location: Online with in-person participation at UZH possible

Price: 1 person - CHF 1.800
3 people: 10% discount
5 people: 20% discount

**Discounts are also available for VSV members, CFA Society Switzerland and Greenbuzz members. Please note this in the registration form if you are a member of one of these organizations.*

Interested?

Contact:
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Sign-up here:

Attributions

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