

## MEDIA RELEASE

### **AZEK launches new training programmes: ESG-CA for client advisors and AZEK certificate FINSA**

- **AZEK launches two new training programmes for financial professionals on the client front: Client Advisor ESG-CA and the AZEK FINSA. Both courses are completed with an AZEK certificate.**
- **ESG-CA qualifies financial professionals to competently inform their clients about ESG and offer them needs-based and risk-optimised investment solutions.**
- **AZEK FINSA enables financial professionals to acquire the knowledge required by law on the FINSA rules of conduct and specialist knowledge flexibly and according to individual needs.**

*Zurich, January 2021 – The new courses are aimed at financial and client advisors, investment advisors, financial planners and specialists in supporting functions in client advisory services.*

#### **ESG-CA for client advisors closes a gap in ESG trainings**

Today, clients expect sustainable investment solutions from their financial service provider that are also attractive from a financial point of view. Sustainable investments are therefore an important trend, which is reflected in a growing range of products and strong inflows of funds. The inclusion of environmental, social and ethical criteria (ESG criteria) in investment decisions requires financial professionals to have in-depth knowledge of the complex interplay of these ESG factors.

The ESG-CA course qualifies advisors to competently inform their clients about ESG and to suggest the right sustainable investment solution for them. This practice-oriented programme thus closes a gap in ESG trainings.

ESG-CA comprises four online seminars of two hours each and is concluded with a multiple-choice examination. Together with the preparation and follow-up work, the learning effort amounts to around 20-25 hours. After successful completion of the examination, the ESG-CA certificate is awarded. The course is offered in German and French.

Andreas Jacobs, CEO AZEK, says: "We are pleased to add the ESG-CA for client advisors to our range of ESG continuing education courses and, together with the Certified ESG Analyst CESGA, which we have been offering since the beginning of 2020, to contribute even better to the stronger anchoring of sustainability in the financial sector."

#### **AZEK Certificate FINSA**

The continuing education programme AZEK FINSA provides client advisors with the knowledge of FINSA rules of conduct and specialist knowledge required by the legislator. The live online seminars enable direct exchange with lecturers and participants. The theoretical knowledge imparted is deepened and consolidated using practical examples.

Participants can individually select the seminars that suit them from the wide range of courses available and acquire the knowledge flexibly according to their needs.

The programme comprises seven online seminars of two hours each. The AZEK FINSA certificate is awarded for participation in at least three seminars per year (including at least one on the FINSA rules of conduct).

Andreas Jacobs explains that “the practice-oriented online training with interactive elements and the individual selection of topics enables client advisors to fulfil the training requirements required by the legislator in a flexible way and to refresh their knowledge continuously.”

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Note for editors:

**AZEK training centre for financial professionals and Swiss Financial Analysts Association SFAA**

The AZEK training centre is a leading provider of training and further education in the fields of financial analysis and asset management, wealth management, financial market operations, financial data science and ESG. It was founded in 1990 by the Swiss Financial Analysts Association SFAA, a non-profit professional association for financial analysts, portfolio, wealth and fund managers and operational specialists with more than 2'900 members worldwide. Further information is available at [www.sfaa.ch](http://www.sfaa.ch) and [www.azek.ch](http://www.azek.ch).