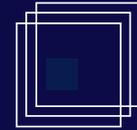


TURN INTENT INTO ACTION

Responsible Investment Advisor (RIA) Course

 Responsible Investment Institute®

Advisors will learn how to practically incorporate sustainability and ESG, a must for those looking to grow their business over the next decade.



RESPONSIBLE
INVESTMENT INSTITUTE

EST. 2019

Responsible Investment Advisor

The Advisor of the Future



Course Purpose

The purpose of this course is to provide attendees with a deeper understanding of the driving forces behind sustainable finance, the fundamentals of responsible investment, the integration of sustainability and the application of ESG.



Opportunity

Responsible investment is an opportunity for companies to make a difference and build their business.



PRACTICAL KNOWLEDGE

The challenge for advisors is the extent of information available on the subject. This course provides time constrained advisors with the fundamentals that can be practically applied in their business.



EMPOWER DECISION MAKERS

Advisors need to be better equipped to help clients ask the right questions. This way, one has a much greater likelihood of achieving the right answers and most importantly, understanding why.



GROW YOUR BUSINESS

The sustainability transition represents a huge opportunity for professional advisors to grow their business, by being prepared to meet the changing demands of clients with an increased focus on sustainability.

The RIA Course is accredited by the IoB and the LIA. It is also certified by CPD UK.

Responsible Investment

“ **Responsible investing has gone more mainstream, but there is still a lot of confusion around what it means and how to approach it.** ”

- Vincent McCarthy, CFA

KEY ELEMENTS



THE WHY - SUSTAINABILITY

Sustainability has become the top priority because we have been living unsustainably for so long. Responsible investment is the explicit consideration of sustainability within business and investments.

THE HOW - ESG FRAMEWORK

ESG is the framework to understand and shape decision making from a sustainability perspective, across the three pillars of Environmental, Social and Governance. Think of sustainability as the overarching objective and ESG as the means to get there.

THE WHO - ALL STAKEHOLDERS

All stakeholders must incorporate sustainability. Within business and investments, company executives, fund managers, investment advisors and trustees, all have a responsibility to take sustainability seriously.

THE WHAT - SUSTAINABLE FUTURE

This is not about compromising returns; it is about delivering more sustainable returns in balance with the biocapacity of our planet and the well-being of all species.

About

The Responsible Investment Institute® was established to address the skills gap around ESG and responsible investing, which is regularly cited by stakeholders as one of the major challenges. Our courses are focused on empowering decision makers to ask the right questions when it comes to thinking about sustainability and responsible decision making.



Online Delivery

The course is delivered virtually over 3 days, consisting of three two-hour sessions.

Calendar

- **Days:**
 - Oct 3rd, 10th, 17th
- **Time:**
 - 2.30pm-4.30pm
- **Specific dates can be arranged for company staff training.**

COST: €750 PER PERSON

CPD: 4 Hours CPD

SUPPORTED BY



REGISTER INTEREST

✉ Contact@responsibleinvestmentinstitute.com

✉ skills@sustainablefinance.ie

Course Modules



Module 1:
The Sustainability Backdrop



Module 2:
The Business Case for Sustainability



Module 3:
Responsible Investment



Module 4:
The ESG Framework



Module 5:
Fiduciary Duty & Application



Module 6:
Responsible Investment Policy



Module 7:
Fund Selection Process



Module 8:
The Advisor of the Future

Course Material



Attendees will receive three comprehensive decks, shaped by key learning outcomes.

A Course developed by an Advisor for Advisors

Vincent McCarthy, CFA
Responsible Investment Institute®

Vincent started his career as a stockbroker in San Diego in 2005 and has over 17 years of experience advising high net worth individuals and institutions, working for companies in the United States, Ireland, and Guatemala. He is a CFA Charterholder and a Qualified Financial Advisor.

Inspired by his time working in impact investing in Latin America in 2017 and motivated by the inertia around responsible investing, Vincent established CoTerra Impact to be a catalyst for change in how we think about business and investments. Recognising a knowledge gap, he founded ESG Ireland® and the Responsible Investment Institute®.

Testimonials

"We were delighted to partner with Vincent McCarthy from the Responsible Investment Institute on the Responsible Investment Advisor (RIA) course. Vincent designed the course specifically for advisors and delivered it in a very practical way, giving them the tools to immediately apply a Responsible Investing framework, with its three pillars of Environmental, Social and Governance(ESG) into their business.

Vincent's deep knowledge and experience of the subject matter is matched by the passion he brings to the course which really brings the topic to life.

We would highly recommend the course to anybody who is looking to understand not only the importance of Responsible Investing but also the logic underpinning it, the growing relevance it plays in all of our investment decision making and to better meet the needs of their clients."

Michael Hayes
Investment Development Manager
Irish Life

"A very well constructed and delivered course, in what has become a very noisy space. Vincent's passion and commitment to the subject matter provides for a very informative and interesting course. Definitely a great value add for any advisory practice who are struggling to implement a sustainability strategy within their firm."

Mark Hedderman
Chief Executive Officer
Hedderman Financial Solutions

"I really enjoyed the course and learned a lot from it. The content is well organised, relevant and topical. I particularly enjoyed understanding the practical application of the much talked about ESG framework, with its three pillars of Environmental, Social and Governance. This course helped us understand our role as responsible advisors, which in turn allows us foster stronger relationships with existing clients and to attract new clients."

John Whitten
Investment Research Analyst
Acumen & Trust

"The course content is at a higher level than a simple intro. to ESG investing and pitched at asset manager level. I found this course to be extremely helpful in raising and contextualising all the issues that I am coming across in assessing ESG strategies today. The topics of ESG and sustainability have grown at such pace that it is very hard to keep up with developments. Nevertheless everything I needed to know was covered and Vincent was very much on top of his brief. I have already referred back to his notes on quite a few occasions for guidance and to better assess and sometimes challenge different ESG labelled investment propositions and styles."

Gerard O'Brien
Director
Heritage Wealth Management

