

## FAQs Certificate in ESG Investing

### **Why is CFA UK transitioning the Certificate in ESG Investing to CFA Institute?**

Since the launch of the **Certificate in ESG Investing** in December 2019, the growing demand and need for education in this space has become clear. As consumers demand more equality and transparency from corporations, accounting for ESG factors in investment management is more important than ever and investment management professionals are seeking out trusted sources of education to support them in their roles.

To date, CFA UK has seen over 5,000 investment professionals register for the Certificate in ESG Investing and over 1,500 graduates have successfully completed the qualification. Increasingly, we are seeing this demand extend globally with around 40% of our candidature coming from around the world. We are keen to extend the availability and reach of the Certificate in ESG Investing and to make it a truly globally recognised credential. Working with CFA Institute, with its reputation for excellence, global reach and network of CFA Societies will enable this. CFA UK are therefore working with CFA Institute to transition the Certificate in ESG Investing into their portfolio of global credentials and this will take place over the next 12-18 months.

### **What does this mean for me?**

For candidates currently studying for the Certificate in ESG Investing, there will be no immediate changes. CFA UK will continue to award the Certificate in ESG Investing until the end of 2021. However, from September 2021, CFA Institute will be administering the Certificate in ESG Investing and managing your candidate journey. The syllabus and learning materials, apart from the usual annual updates, will remain the same and the qualification title will also remain the same.

### **Who should I contact if I have a query about my registration / exam booking?**

You should continue to contact CFA UK for any queries relating to the Certificate in ESG Investing. From September 2021, all such queries should be directed to CFA Institute and we will contact you again prior to September with further information.

### **Will I need to retake the Certificate in ESG Investing?**

No – graduates will not need to retake the Certificate in ESG Investing when it transitions over to CFA Institute.

### **Can I convert my CFA UK certificate and digital badge to the new CFA Institute credential and digital badge?**

Yes, CFA UK holders of the Certificate in ESG Investing certificate and digital badge will be able to convert their certificate and digital badge to the new CFA Institute credential and digital badge towards the beginning of 2022. Further communications will be sent nearer the time explaining how to do this.

**Will the Certificate in ESG Investing count as part of the CFA Program?**

No, the Certificate in ESG Investing will not be part of the CFA Program but will complement it for those wishing to further extend their knowledge of ESG investing. The Certificate in ESG is designed to provide the benchmark knowledge and skills required to integrate ESG factors, whereas the CFA Program is an advanced level credential providing a strong foundation in advanced investment analysis and real-world portfolio management skills.

**Can I still study for the CFA UK Diploma in Investment Management (ESG)?**

Candidates wishing to gain the Diploma in Investment Management (ESG) will have until the end of December 2021 to achieve the qualification, after which point it will no longer be available.