



### Working group member: ESG Panel (ESG specialist)

No of new member volunteers	4
Commitment	40-50 hours per annum
Reports to:	Jessica Fleetwood, IMC Programme Manager

#### Purpose

Over the past year, CFA UK has invested significant time and resources into developing a syllabus for a new ESG qualification that will give investment professionals the skills and knowledge to integrate ESG (Environmental, Social and Governance) issues into their day to day roles. This is because, despite significant growth in interest in ESG and recognition of its growing importance throughout the investment sector, there remains a lack of formal qualifications that can equip professionals with the knowledge and skills increasingly required.

The Certificate in ESG in Investment will be a modern and progressive qualification. Designed for practitioners working in investment roles who want to learn how to analyse and integrate material ESG factors, it will also be suitable for anyone working in sales & distribution, wealth management, product development, financial advice, consulting, risk and anyone looking to improve their understanding of ESG issues. The skills learned will be equally applicable to all asset classes.

The ESG Panel will be responsible for all aspects of the provision of the ESG qualification, for the ESG examination, syllabus and for the Official Training Manual.

#### Main activities in the first year:

- Review and agree assessment format for new ESG examination
- Review and provide feedback on examination questions
- Review and provide feedback on the ESG study materials

#### Who are we looking for?

- Four practitioners who are able to offer expertise in any one (or more) of the following areas: Governance / Environmental / Social Factors; ESG Analysis, Valuation & Integration; Engagement & Stewardship; ESG Integrated Portfolio Construction and Management; Investment Mandates, Portfolio Analytics and Client Reporting
- Availability for around six meetings throughout the membership year.
- Ability to work with a group to shape ideas.

#### What you will gain:

- Insight into qualification development and delivery and you will help define and determine the requirements and set the standards for the new ESG qualification
- Build your profile within the CFA UK network of volunteers, the wider membership and the industry
- The opportunity to meet an interesting and engaged group of fellow practitioners from a



range of sectors

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to [volunteer@cfauk.org](mailto:volunteer@cfauk.org)

Deadline for applications: 30 November 2018