

Become an ESG Investing Expert

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PLENUM

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Environmental, Social and Governance (ESG) considerations are becoming an integral part of investment management. The Certificate in ESG Investing is responding to client demand and regulatory developments. This presentation provides an overview of how to develop your expertise in ESG Investing.

The CFA Institute Certificate in ESG Investing offers you both practical application and technical knowledge in the fast-growing field of ESG investing — an opportunity to both accelerate progress and demonstrate purpose. This certificate is designed for investment practitioners who want to learn more about how to analyze and integrate material ESG factors into their day-to-day roles. It is suitable for anyone working in front or back offices and adjacent roles — including sales and distribution, wealth management, product development, financial advice, consulting, risk — as well as anyone looking to improve their understanding of ESG issues.

The certificate and learning materials were developed by leading practitioners for practitioners, and have been recognized by the UN Principles for Responsible Investment (PRI), an independent body that seeks to encourage investors to use responsible investment to enhance returns and better manage business risks.

Sheila Ohlund

CFA, CPA, CEO of CFA Society Switzerland

Sheila is CEO of the CFA Society Switzerland. She has over twenty years of investment experience at major financial firms. She was a Partner at SBC Brinson, and following its merger with UBS was responsible for portfolio management and research.

Previously, she was Executive Director and Head of Research at Rothschild Bank in London and Zürich. Prior to working at Rothschild Bank, she was responsible for global equity thematic investment at American Express's international asset management in London.

She started her career as a Certified Public Accountant (CPA) with Price Waterhouse. Sheila has the chartered financial analyst (CFA) and ESG Investing certificates. She has masters degrees from the Massachusetts Institute of Technology (MIT) and the London School of Economics as well as an Innovation and Entrepreneurship Certificate from Stanford University.