



EDMOND DE ROTHSCHILD AND SWISS SUSTAINABLE FINANCE LAUNCH A SUSTAINABLE INVESTMENT E-LEARNING TOOL

This new interactive tool designed to train finance professionals on sustainability issues and developed jointly by Edmond de Rothschild group and the Swiss Sustainable Finance (SSF) association will be publicly unveiled during a conference on Wednesday 31 October in Geneva.

"The finance industry is playing a vital role in the transition to a sustainable economy and world. To support the flows of private and public capital required for this transition, a major change of mindset is needed among investment professionals, including Relationship Managers. That is why Edmond de Rothschild has developed and funded this online course on Responsible Investment in conjunction with Swiss Sustainable Finance", confirms Martin Liebi, Deputy CEO, Head of Private Banking, Edmond de Rothschild (Suisse) S.A.

"For us, being a Responsible Investor means aligning our values, skills and beliefs with an urgent societal need. As a pioneer in this field, we have been developing our expertise in Responsible Investment for more than 10 years, and we wanted to put this expertise at the service of the evolution of our sector", explains Martin Liebi.

"Sustainable investment is now an integral part of the economic landscape and will become increasingly important for the financial sector in general, including private banking", notes Jean Laville, Deputy CEO, Swiss Sustainable Finance. Legislative changes are moving in this direction and clients are increasingly opting for sustainable investment, because they want their investments to be aligned with their values and to have a positive impact on society.

Who is this e-learning platform aimed at?

The community of financial experts needs to understand this change in order to be able to effectively serve clients within this new context. *"We felt that training materials needed to be created to enable finance professionals to understand this change and contribute to it through their individual and collective work",* adds Kate Cacciatore, Global Head of Sustainability, Edmond de Rothschild Group. A recent study published by the University of Zurich¹ revealed that only one in two banks provide just a few hours of training for their relationship managers on sustainable investment.

In practice, this e-learning tool offers access to four online modules in English. These modules are structured around the core elements of the financial sector's value chain:

¹ <https://www.media.uzh.ch/en/Press-Releases/2018/Banks.html>

- What is Sustainability and what are the implications for the financial sector?
- The driving role of institutional Asset Owners in the sustainable value creation process and the implications for Asset Managers
- The integration of Sustainability into company business models and strategy, and their implications for company analysis and valuation
- Enhancing the value proposition for private banking clients through Sustainable Investment

French and German versions are currently being finalised.

What was the rationale behind making this a collaborative project?

Edmond de Rothschild has chosen to work with Swiss Sustainable Finance's members and partners because pooling our strengths will make it possible to move forward with one single voice and clarify the relevance and importance of this subject for our entire industry. That is why this e-learning programme will be shared for free with all Swiss Sustainable Finance members and partners on the SSF website. Moving forward, there are plans to open up this e-learning programme to the public to help ensure the full integration of sustainable investment within the financial sector.

The Education work group within Swiss Sustainable Finance has enabled it to support its members with the deployment of their sustainable investment strategies. *"Academic research and our members' own experiences clearly show that one of the main obstacles for private banks in particular is the lack of understanding of this issue among Relationship Managers. This training will put them in a better position to discuss this subject with their clients, who also expect them to meet the challenges of sustainable investment"*, concludes Jean Laville.

ABOUT THE EDMOND DE ROTHSCHILD GROUP

Edmond de Rothschild is an ambitious, independent family-run investment house which specialises in private banking and asset management based on the idea that wealth should be used to create tomorrow's world. In all its activities, the Group focuses on bold strategies and long-term investments which are rooted in the real economy – infrastructure, healthcare, biotechnology and impact investing. Founded in 1953, the Group has been managed since 2015 by Baroness Ariane de Rothschild as President of the Executive Committee.

The Group has CHF 182 billion in assets under management, 2,600 employees and 27 sites worldwide as of 31 December 2017.

SWISS SUSTAINABLE FINANCE

Swiss Sustainable Finance (SSF) strengthens the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalysing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites 100 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations. An overview of Swiss Sustainable Finance's current members and network partners can be found [here](#).

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