MONEY MANAGEMENT INSTITUTE

ADVANCING THE FUTURE OF INVESTMENT ADVICE AND SOLUTIONS

Continuous Learning Center

MMI/Morningstar Sustainable Investing Curriculum

The MMI/Morningstar Sustainable Investing Curriculum provides an introduction to the fundamentals, principles, and practices of sustainable and environmental, social, and governance (ESG) investing. Designed to help financial advisors and investment professionals meet increasing investor demand for sustainable investing, the eight-course, 3.4-hour curriculum blends foundational information and terminology with practical insights from advisors who have already successfully integrated ESG into their practices.

These intermediate-level courses, developed under the guidance of academic and industry leaders, are based on 70 hours of interviews with subject matter experts and information from 180 unique sources. They cover key ESG concepts and approaches, examine common misconceptions, provide an introduction to ESG factor analysis, offer case studies of ESG issues, and real-world suggestions on how financial advisors can incorporate sustainable investing into their practices.

The curriculum is suitable for financial advisors and anyone who would benefit from a practical understanding of sustainable investing and how it can be integrated with traditional advisory approaches and practices.

ESG101 What is Sustainable Investing?

This lesson serves as the entry point into the Sustainable Investing Curriculum. It introduces and defines foundational terminology and concepts, addresses common misconceptions, and outlines the main approaches to sustainable investing.

ESG102 The Importance of Sustainable Investing

This lesson approaches sustainable investing from a big-picture perspective. It presents a broad view of how the pursuit of long-term investment returns can simultaneously help preserve and enhance the environment, society, and the larger economy.

ESG103 Introduction to ESG Analysis

This lesson explains how ESG factors can help uncover risks and opportunities, while putting particular emphasis on the importance of materiality. It then summarizes how investors are analyzing ESG factors alongside traditional financial data for active, passive, and quantitative/smart-beta approaches.

ESG104 Understanding ESG: Environmental Issues

This is the first of three lessons focusing on ESG issues. After a brief overview of environmental issues, this lesson analyzes two topics—climate change and water scarcity—and explores how investors can mitigate the risks and seize the opportunities they present.

ESG105 Understanding ESG: Social Issues

This is the second of three lessons focusing on ESG issues. After a brief overview of social issues, this lesson analyzes two topics—supply chains and gender equality—and explores how investors can mitigate the risks and seize the opportunities they present.

ESG106 Understanding ESG: Corporate Governance

This is the last of three lessons focusing on ESG issues. It emphasizes the importance of good governance for investors, outlines the broad principles of governance, identifies indicators of good governance, and examines the relationship between governance and other environmental or social issues.

ESG107 **Impact Investing**

This lesson serves as an entry-point for understanding Impact Investing. The lesson presents examples of Impact Investing across asset classes, addresses common misconceptions, and illustrates how companies and investors define, generate, and measure impact.

ESG201 **Integrating ESG into Investment Advice**

This lesson presents a high-level overview of how financial advisors can incorporate sustainable investments into the client advisement process. The lesson presents both a conceptual framework and video interviews from financial advisors who have successfully incorporated sustainability into their practice.

The complete ESG200 series will be available in Q1 2020.

The Sustainable Investing Curriculum is ideal for:

- Financial advisors and their support personnel
- Product teams
- Due diligence staff
- Service team associates
- Distribution professionals and their internal partners
- Any investment advisory or wealth management employee

BENEFITS

- Content developed by subject matter experts
- Regularly updated to keep up with latest industry trends
- Turnkey solution for in-house L&D and training teams
- Provides training progression for employees and streamlines new employee onboarding
- Provides a competitive edge and differentiation
- Eligible for CE Credits—3.5 hours for Investments & Wealth Institute® CIMA®, CPWA®, CIMC®, and RMA®; 2.0 hours for Fi360 AIF®, AIFA®, and PPC®; and 4.0 hours for CFP® designations
- Streamlined on-demand access
- State-of-the-art learning management system powered by Kaplan SmartPros
- Mobile-friendly and accessible 24/7 to accommodate any schedule
- Reporting tools to monitor course progress
- Digital badges available upon course completion

MMI/MORNINGSTAR SUSTAINABLE INVESTING INITIATIVE

The Sustainable Investing Curriculum is one component of the **MMI/Morningstar Sustainable Investing Initiative**, a program dedicated to preparing financial advisors to incorporate sustainable investing into their practices. The program also includes workshops, forums, and thought leadership content. **Learn more at mmi-sii.org**.

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The MMI Continuous Learning Center offers a structured, comprehensive education platform for all career stages of the investment professional. Available programs include Fundamentals of Investment Advisory Solutions, Sustainable Investing Curriculum, Wealth Management Essentials, Wholesaler Training Curriculum, and an Education Marketplace of third-party offerings. For more information or to schedule an online demonstration, contact us at **(646) 868-8500** or **learning@mminst.org**.