Training Course on Ethical and Sustainable Investment Practices in Pensions

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Ethical and Sustainable Investment Practices in Pensions is designed to equip professionals with the knowledge and skills necessary to integrate ethical and sustainable investment practices into pension fund management. As societal expectations shift towards greater responsibility and accountability in investing, understanding how to incorporate environmental, social, and governance (ESG) factors becomes crucial for pension funds. This course focuses on the principles and practices of ethical and sustainable investing, enabling participants to make informed decisions that align with both financial goals and societal values. Participants will explore key topics such as ethical investment frameworks, sustainability criteria, regulatory considerations, and best practices in stakeholder engagement. The curriculum integrates theoretical concepts with practical applications, featuring case studies and interactive activities that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-equipped to implement effective ethical and sustainable investment strategies that enhance the long-term performance and impact of pension funds

Programme Curriculum

Training Course on Ethical and Sustainable Investment Practices in Pensions

Introduction

Training Course on Ethical and Sustainable Investment Practices in Pensions is designed to equip professionals with the knowledge and skills necessary to integrate ethical and sustainable investment practices into pension fund management. As societal expectations shift towards greater responsibility and accountability in investing, understanding how to incorporate environmental, social, and governance (ESG) factors becomes crucial for pension funds. This course focuses on the principles and practices of ethical and sustainable

investing, enabling participants to make informed decisions that align with both financial goals and societal values.

Participants will explore key topics such as ethical investment frameworks, sustainability criteria, regulatory considerations, and best practices in stakeholder engagement. The curriculum integrates theoretical concepts with practical applications, featuring case studies and interactive activities that allow attendees to engage with real-world scenarios. By the end of the training, participants will be well-equipped to implement effective ethical and sustainable investment strategies that enhance the long-term performance and impact of pension funds.

Course Objectives

1. Understand the fundamentals of ethical and sustainable investing in pensions.
2. Analyze the significance of ESG factors in investment decision-making.
3. Evaluate ethical investment frameworks and standards.
4. Explore sustainability criteria for evaluating investment opportunities.
5. Discuss regulatory frameworks affecting ethical investing.
6. Identify best practices for integrating ethical and sustainable practices.
7. Develop skills in stakeholder engagement and communication.
8. Conduct scenario analysis for ethical investment strategies.
9. Foster collaboration among investment teams and stakeholders.
10. Create actionable plans for implementing ethical investment strategies.
11. Stay informed about emerging trends in ethical and sustainable investing.
12. Measure the effectiveness of ethical investment practices.
13. Identify tools and technologies for enhancing sustainable investing.

Target Audience

1. Pension fund managers
2. Investment analysts and strategists
3. ESG specialists and sustainability officers
4. Compliance officers
5. Financial consultants and advisors
6. Actuaries and actuarial analysts
7. Graduate students in finance or sustainability studies
8. Policy makers in pension fund management

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Ethical and Sustainable Investing

- Overview of ethical and sustainable investing concepts and principles.
- Importance of ethical investing in the context of pension funds.
- Key terminology related to ESG factors and sustainable finance.
- Historical context and evolution of ethical investment practices.
- Case studies illustrating successful ethical investment strategies.

Module 2: Understanding ESG Factors

- Identifying environmental, social, and governance factors in investing.
- Evaluating the impact of ESG factors on financial performance.

- Understanding the relationship between sustainability and risk management.
- Real-world examples of ESG-related investment opportunities.
- Techniques for measuring ESG performance.

Module 3: Ethical Investment Frameworks and Standards

- Overview of ethical investment frameworks (e.g., PRI, UN SDGs).
- Evaluating different ethical standards and certifications.
- Understanding the role of shareholder activism in ethical investing.
- Best practices for aligning investments with ethical guidelines.
- Case studies on the implementation of ethical frameworks.

Module 4: Sustainability Criteria for Investment Evaluation

- Techniques for assessing sustainability in investment opportunities.
- Understanding the role of sustainability reporting and disclosure.
- Evaluating the impact of investments on environmental and social outcomes.
- Real-life examples of sustainable investment assessments.
- Tools for integrating sustainability criteria into investment analysis.

Module 5: Regulatory Frameworks for Ethical Investing

- Overview of regulations affecting ethical and sustainable investing.
- Key legislation impacting pension fund management in relation to ESG.
- Understanding compliance requirements for ethical investment practices.
- Engaging with regulators on sustainability issues.
- Case studies on regulatory challenges and solutions.

Module 6: Best Practices in Ethical and Sustainable Investment

- Techniques for implementing ethical and sustainable investment strategies.
- Understanding the importance of governance and oversight in ethical investing.
- Developing operational processes for effective sustainable investment management.
- Real-world examples of best practices in ethical investment.
- Tools for implementing sustainable investment practices.

Module 7: Stakeholder Engagement and Communication

- Importance of effective communication in ethical investing.
- Techniques for engaging stakeholders on ESG issues.
- Developing educational materials on ethical and sustainable investing.
- Best practices for reporting ESG performance to clients and beneficiaries.
- Real-life examples of successful stakeholder engagement strategies.

Module 8: Implementing Ethical and Sustainable Investment Strategies

- Steps for developing a comprehensive ethical investment strategy for pension funds.
- Engaging teams and stakeholders in the implementation process.
- Setting measurable objectives and timelines for ethical investment initiatives.
- Monitoring and adapting ethical investment strategies over time.
- Presenting ethical investment plans and results to stakeholders for approval.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com