

Webinar – ESG Investing Certificate

June 30, 2020

Gabriel Houette, CFA
Patricia Donnelly, CFA



**CFA Society
France**

Who are we?



Gabriel is a senior fixed income trader with Natixis. His expertise covers various asset classes ranging from corporate hybrids to green bonds. Gabriel was awarded his CFA Charter in 2017 and participated in the pilot program for CFA UK's ESG Investing certificate, which he obtained in October 2019. He is the ESG Committee Chair at CFA Society France.

Gabriel Houette, CFA



Patricia has been a member of the Consultant Relations team at BNPP AM since January 2010. Previously she had been Head of Client Service and Head of the RFP team. Patricia was awarded her CFA Charter in 2002 and is a Past President of CFA Society France. She earned the CFA UK ESG Investing in 2019, She is the Scholarships Committee chair and is also a member of the CFA Society France Candidates Committee.

Patricia Donnelly, CFA

ESG Committee

Our objective: accompany CFA Society France members as they discover the world of ESG and represent them in ESG-related initiatives in the Paris financial industry



Julien jointly manages the Allianz Green Bond fund at Allianz Global Investors. He is also responsible for SRI Integration in fixed income portfolios at AGI. Previously he had been an SRI analyst.

Julien Bras, CFA



Hervé manages SRI Investment Grade and High Yield portfolios at Allianz Global Investors. Previously he managed High Yield portfolios and was also a fixed income trader.

Hervé Dejonghe, CFA

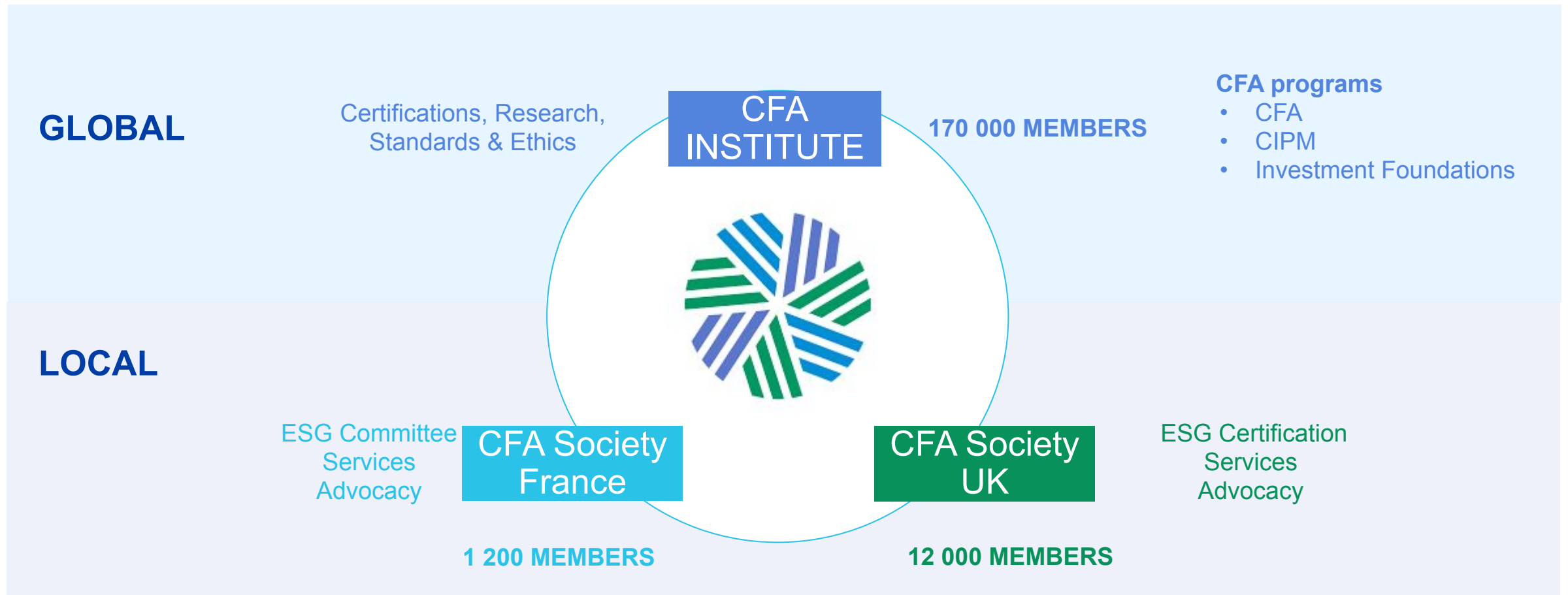


Marina is an SRI analyst at Mirova. She is particularly responsible for SRI idea generation and is also a financial analyst for equity SRI funds.

Marina Iodice, CFA

CFA ecosystem

The CFA ecosystem is organized around two structures:



How to become a member

Two CFA Institute membership categories

Regular member

- >4 years' experience in the financial industry
- CFA Charterholders, candidates & others – sponsors, ethics questionnaire (if you have not passed Level I)
- + Membership Fees (\$370, including \$95 for CFA France)
- Only Charterholders can put “CFA” after their name!

Affiliate member

- <4 years' experience
- Candidates, CFA “Charter Pending” and others – sponsors, ethics questionnaire (if you have not passed Level I)
- + Membership Fees (\$370, including \$95 for CFA France)

For more information, visit <https://www.cfainstitute.org/en/programs>

The Partnership

The partnership between CFA Society UK & CFA Society France

- CFA Society France promotes the exam developed by CFA UK in France
- Candidates in France have access to:
 - 8 exam centers in France (see Appendix)
 - 4 centers in Paris (including one at La Défense)
 - 1 center in Lille, Lyon, Marseille and Toulouse
 - Local support in French

CFA Society France is considering a local membership category specifically for ESG Certificate graduates and candidates

- Access to all CFA France events
- Mentoring, career, networking...

For more information, contact esg@cfafrance.org

Registration

Who can register?

Everybody! No need to be...

- A CFA Charterholder
- A CFA Society member
- No prerequisites, other than a background in finance

How to register

- Visit CFA Society UK's website: <https://shop.cfauk.org/esg/booking/new/>

How much does it cost?

- Registration fees = £470 (exam fees + online e-book)
- +£30 for the book(+ postal costs) details available on the ESG candidate page

Is it eligible for the DIF/CIF ?

- No, but employers can use their training budget, as they already do for the CFA program

For more information, visit <https://www.cfauk.org/study/esg-test-specification>

The curriculum *

* Version 1, valid until end August 2020

Topic	Topic Name	Question Allocation	
1	Introduction to ESG	4-8	Analysis
2	The ESG Market	4-8	
3	Governance Factors	6-12	
4	Environmental Factors	6-12	
5	Social Factors	6-12	
6	ESG Analysis, Valuation & Integration	20-32	
7	Engagement & Stewardship	6-10	Action
8	ESG Integrated Portfolio Construction & Management	8-14	Management
9	Investment Mandates, Portfolio Analytics & Client Reporting	4-8	

The calendar

When ?

- Time limit to sit the exam once you have registered online = 12 months

What about coronavirus ?

- Not possible to sit the exam at present. Time limit extended

Where ?

- 8 centers Pearson Vue in France
- Candidates can change test date and test center up until 3 days before exam date

How long should it take to prepare?

- 100 hours minimum at home

How often is the curriculum revised?

- Syllabus Version 1 up to end August 2020
- Syllabus Version 2 starting in September 2020
- Material for Version 2 available during May 2020

The exam

How/where does the exam take place?

- VERY strict security: the same valid passport used to register online on the CFA UK website
- Remote proctoring or test center
- No need to bring anything, everything is provided on site

What format does the exam take?

- 100 multiple choice questions in 2 hours 20 minutes
- Single questions and item set: text followed by a series of several questions thereon

1. Which of these investment approaches would be most suitable for an investor who wants to ensure that their personal, social and moral views direct the investment decisions?

- A. Ethical investing.
- B. Thematic investing.
- C. Impact investing.
- D. Responsible investing.



For more information: <https://www.cfauk.org/-/media/files/pdf/pdf/esg-pdfs/esg-specimen-paper-v2.pdf>

What advantages does the exam bring?

- A big plus for your career
- Join an international network (1635 candidates, 315 graduates), with 9 CFA Partner Societies
 - CFA Society Denmark
 - CFA Society Finland
 - CFA Society France
 - CFA Society Ireland
 - CFA Society Luxembourg
 - CFA Society United Kingdom
 - CFA Society VBA Netherlands
 - CFA Society Spain
 - CFA Society Switzerland
- Support from the United Nations Principles for Responsible Investment (UN PRI)
- Paper diploma and an electronic badge on LinkedIn



Curriculum updates

- The program is revised every year
 - Including new elements
 - Improving the educational logic
 - Enriching the content
- Minor differences between Versions 1 and 2
 - Six new elements
 - Simplification, less duplication
 - Content reorganized to facilitate the learning experience

For more information, visit [Certificate in ESG Investing syllabus changes from version 1 to version 2](#)

Appendix 1 – Test Centers in France

- Paris
 - AJC Formation 6 rue Rougemont, 75009 Paris,
 - Artemys: 50 rue de Paradis, 75010 Paris,
 - IBS GLOBAL: 42-52 Rue de l'Aqueduc, 75010 Paris
 - ib SA: Tour Atlantique 1 Place de la Pyramide, 92911 Paris La Défense
- Lyon
 - Global Knowledge Lyon: Immeuble 6eme, Part Dieu, 23 Boulevard Jules Favre, 69006 Lyon
- Lille
 - Global Knowledge Lille: EuraTechnologies, 165 Avenue de Bretagne, 59000 Lille
- Marseille
 - ITTS (Adpro formation): 84 Bd.de la Corderie, 13007 Marseille
- Toulouse
 - Vaelia: 2 Impasse Henri Pitot, Parc de la Plaine, 31500 Toulouse

Appendix 2 – Online Proctoring

- Candidates will now be able to sit the exam from home via an online system
- Online proctoring will enable candidates from around the world to earn the CFA Investing certification.
- Please visit the CFA UK website for [FAQs](#)

Click [HERE](#) for more details
on remote examination.

For more info
on the ESG Investing certification
click [here](#)



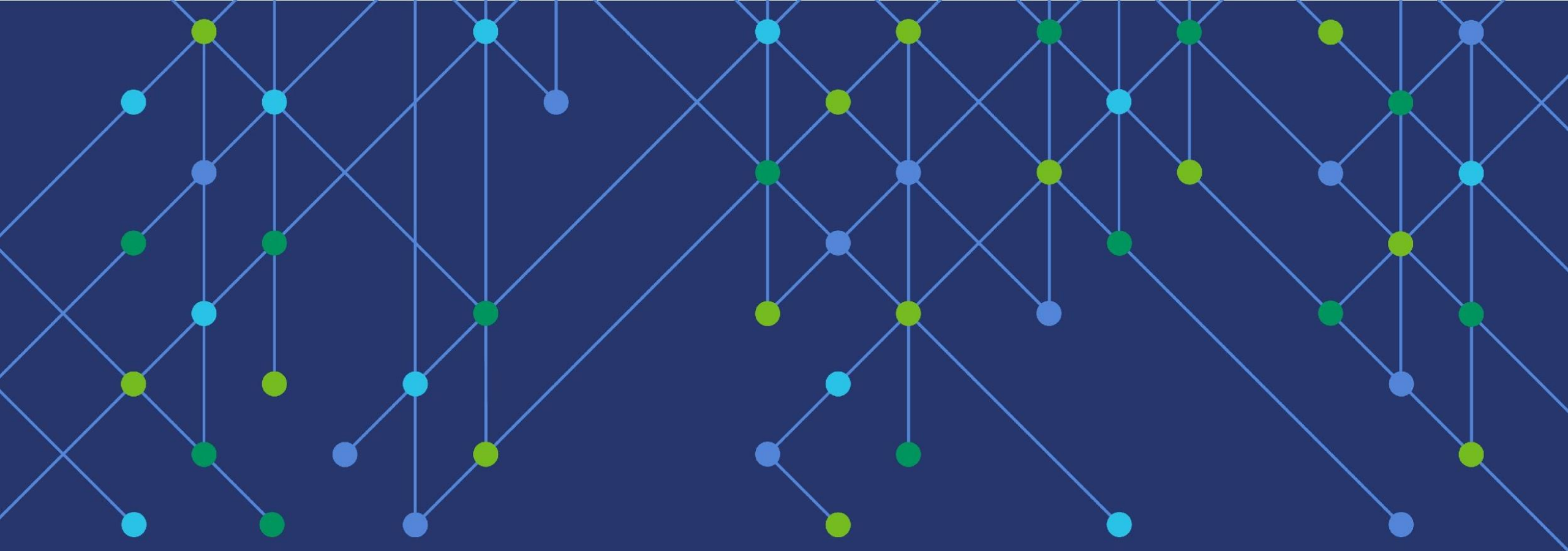
Become a candidate member!

- mock exams
- workshops for all levels
- 60+ events & webinars
- social & networking events
- career development
- mentoring program
- volunteering program
- 1200+ member community

Yearly fee: 70€

JOIN!

More info: candidates@cfafrance.org



Q&A