

# ESG, SUSTAINABILITY AND CLIMATE CHANGE FOR BANK EXECUTIVES – TRANSITIONING TO NEW LENDING STRATEGIES

ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG) PORTFOLIO



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# ESG, SUSTAINABILITY AND CLIMATE CHANGE FOR BANK EXECUTIVES – TRANSITIONING TO NEW LENDING STRATEGIES

## COURSE OUTLINE

Banks are now expected to demonstrate how they are managing environmental, social and governance (ESG) related risks through their funding activities. They must also show that they are responding positively to emerging opportunities which adds long-term value, satisfies all stakeholders and contributes to national and international Sustainable Development Goals (SDGs).

Investors are increasingly expecting banks to transform their lending strategy and drive their clients' green transition plans. Only banks that do so will be able to maintain and strengthen their credibility and secure new long-term investment. As their risk management and sustainability strategies become increasingly complex, banks must now work closely with their credit clients to develop strategic approaches to migrating their clients' business operations to environmentally friendly and lower carbon models. This is now a key imperative.

This course explores the practical steps required to transform bank lending and influence clients' transition plans. It will also examine climate-related financial disclosure and transparency initiatives and obligations facing banks and their customers.

## COURSE PARTICIPANTS

This course is for bank executives responsible for taking client business forward towards sustainable performance. Potential participants may include:

- Risk Managers, Credit Analysts and Relationship Managers
- Sustainability Managers, Strategists and Marketing Directors
- Treasury Managers, Asset-Liability Committee (ALCO) Members and Legal Counsels

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand ESG and climate change drivers
- Outline international and local standards, requirements and laws, and their impact on banks
- Meet ESG related financial disclosure reporting requirements
- Conduct robust sectoral analysis to inform credit and investment portfolio strategy
- Review the status of a client's ESG credentials and green transition plans against bank requirements and expectations
- Engage in a strategic dialogue with clients to influence their ESG and green ambitions

- Actively pursue Green and Climate finance opportunities in existing and new business sectors
- Deliver ESG reporting to recognised and emerging standards, including the latest climate-related financial (TCFD) disclosure requirements

## KEY TOPICS

- Implications for banks: ethics, compliance, standards, reporting requirements, bank stakeholder expectations, and bank partnership initiatives for peer learning
- Lending portfolio strategies – sector assessment, risk and opportunities, and medium-term viability
- Examining physical climate risk
- Credit and project finance appraisal incorporating ESG/Green criteria and other risks
- Assessing migration plans to lower carbon business models, supply chain resilience and circular economy initiatives
- Managing transition risks: policy changes, legal, technology, market
- Climate change transition in practice, including decreasing funding to carbon intensive enterprises, using green loans and Green Bonds and working with multi-laterals
- Managing client relationships and dialogue around green transition plans

DURATION	FEE	DATE	VENUE
05 days	£1,950	11 - 15 November 2024	Uzbekistan

## “ON DEMAND” COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

## WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.



## FEATURED TRAINER DUNCAN HUGHES

Duncan has over 25 years of experience in financial services across the banking, asset management and insurance sectors.

During his career in financial services he has held many senior positions at major financial firms including NM Rothschild and Columbia Threadneedle, where he was responsible for, amongst other things, green bond structuring and the development of sustainable investment products.

Duncan is a tutor for all three levels of the internationally recognised Chartered Financial Analyst (CFA) programme, as well as the CFA's international ESG programme and their Climate Change impact qualification. Working with some of the world's leading banks, he has provided consultancy services to assist with the complex transition of their asset portfolios and capital allocations to meet Net Zero emissions targets and environmental commitments.

With a speciality in ESG training, Duncan has also delivered programmes for all levels within banking organisations to build knowledge capacity to support the transition to more sustainable balance sheets and product ranges.