

CHARTERED 
INSTITUTE OF PROFESSIONAL CERTIFICATIONS

CHARTERED SUSTAINABLE FINANCE MANAGER™

CSFM™

**Fully Accredited
By:**

Chartered Institute of
Professional Certifications

CPD
Certification Service



PROGRAM OVERVIEW



Sustainable finance has experienced a notable surge in recent years due to the increasing awareness of its advantages and the imperative for global environmental and social measures. In 2021 alone, **sustainable bond issuance surpassed \$700 billion, tripling the amount recorded five years prior.** Additionally, significant institutional investors are actively acknowledging this trend with **90% of the world's 500 largest asset owners now consider environmental, social, and governance (ESG) factors when making investment choices.**

This Chartered Sustainable Finance Manager (CSFM™) program is designed to immerse you in the vast and dynamic landscape of sustainable finance. You will gain a comprehensive understanding of intricate **sustainable finance topics including sustainable finance risk, responsible investing, greenwashing, and green, blue, and social bonds.** It will also encompass specialized topics like **spatial financing and impact measurement and management.** Moreover, you will delve into **essential sustainability reporting, regulatory, and governance standards including GRI, SASB, CSRD, SFDR,** and gain insights into **emissions, scopes 1, 2, & 3, and carbon footprinting.** Through this powerful journey, you will cultivate the confidence, skills, and knowledge to capitalize on opportunities, navigate risks, and catalyze impactful change within sustainable finance.

ACCREDITATIONS



4.8



4.6



PROGRAM OVERVIEW



Throughout the program, you will also attain proficiency in **executing sustainable finance strategies**, employing an array of tools and resources that encompass **sustainability-linked loans and sustainable cryptocurrencies**. You will also discover how to build sustainable investment product portfolios with precision. Additionally, the program hones your abilities in **data collection, impact measurement, and reporting**, enabling you to articulate the value of sustainable investments persuasively to clients, regulatory bodies, and investors, thereby consolidating your stature as a **credible authority in sustainable finance**.

Upon completion of the program and successfully passing the Chartered exam, participants will earn the Chartered Sustainable Finance Manager (CSFM™) designation. This credential will demonstrate your expertise in **navigating the complex intersection of finance and sustainability**. It will also equip professionals with the necessary tools and resources to implement **transformative sustainable finance strategies** that drive positive environmental, social, and economic change and thrive in the intricate realm of corporate finance.

Globally demanded and recognized, this designation is an industry-recognized trademarked charter developed by the **Chartered Institute of Professional Certifications** and has lifelong validity. It is also independently accredited by CPD as adhering to the highest standards of continuing professional development. We look forward to welcoming you to this program.

ACCREDITATIONS



4.8



4.6



KEY SKILLS YOU WILL GAIN

From This Program



**SUSTAINABLE FINANCING
TAXONOMY OF SUSTAINABLE FINANCE
GREEN FINANCE FRAMEWORK
IMPACT MEASUREMENT**

**ESG INTEGRATION
GREEN INITIATIVES
GREEN FINANCIAL SYSTEM
GREEN FINANCIAL INSTRUMENTS**

**SDG FINANCING
RESPONSIBLE INVESTMENT STRATEGIES
GREEN FINANCE STANDARDS
GLOBAL REPORTING INITIATIVE**

**INTEGRATED REPORTING FRAMEWORK
SUSTAINABLE FINANCE FRAMEWORK
ESG INVESTING
GREEN BOND PRINCIPLES
IMPACT INVESTING**

**SUSTAINABILITY REPORTING
INTEGRATED SDG STRATEGY**

YOUR FACULTY DIRECTOR



Stephen Snider

Renowned Sustainability Expert and Sustainability Finance Lead

Stephen Snider is a prominent figure in **sustainable finance and a dedicated environmental advocate**. With an extensive background in corporate banking and finance, he has garnered invaluable expertise over the course of a decade, working with esteemed global institutions such as State Street, Santander, and Ameriprise. Stephen's proficiency extends across multiple domains, including **asset management, corporate treasury, reporting, and analytics**. He has **proactively engaged in carbon literacy training, equipping himself with an in-depth understanding of carbon management and its practical application within the finance industry**.

Currently, Stephen holds the position of **Sustainable Finance Lead at oikos International, where he spearheads the development of training programs and workshops aimed at instilling sustainability knowledge** among higher education institutions and young professionals. Demonstrating his thought leadership, he has **authored and published numerous articles covering a range of topics, including sustainability, impact investing in the Caribbean, and the advancement of small island states**.

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Pfizer

Life is our life's work

Nestlé



PROGRAM AGENDA

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MODULE 1 - INTRODUCTION TO SUSTAINABLE FINANCE

- Overview - Introduction to Sustainable Finance
- Background to Finance
- What is Sustainable Finance
- Role of Corporations
- Stakeholders and the Ecosystem
- Centers of Power and Influence
- Case Study

MODULE 2 - PRINCIPLES OF FINANCIAL SUSTAINABILITY

- Overview - Principles of Financial Sustainability
- Key Ideas of Sustainable Finance
- History of the Sustainable Finance Industry
- Net Zero
- Going Beyond Carbon
- Business Risks and Opportunities
- Performance and Growth
- Case Study

MODULE 3 - CORE KNOWLEDGE, SKILLS, AND APPROACHES TOWARDS SUSTAINABLE FINANCE

- Overview - Core Knowledge, Skills, and Approaches Towards Sustainable Finance

- Approaches and Strategies
- Risk Management
- Long Term Value Creation
- Investing and Asset Management
- Where Do We Go Next
- Government Action
- Personal Finance and You
- Case Study

MODULE 4 - HOW IS SUSTAINABLE FINANCE INCORPORATED INTO FINANCIAL INSTRUMENTS

- Overview - How is Sustainable Finance Incorporated into Financial Instruments
- Methods for Investment
- Investment Process
- Equity
- Fixed Income
- Project Management
- Barriers
- Overcoming Awareness
- Case Study

MODULE 5 - ESG

- Overview - ESG
- What is ESG?
- Incorporating ESG
- ESG Factors



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- Indices & Ratings
- Challenges & Assumptions
- A Path Forward
- Case Study

MODULE 6 - IMPACT INVESTING

- Overview - Impact Investing
- Our World is Out of Rhythm
- Climate Justice
- Global Recognition for Action
- Investing in Impact
- The Blue Economy
- Areas to Invest In
- Case Study - Measuring Impact

MODULE 7 - SUSTAINABILITY REPORTING

- Overview - Sustainability Reporting
- Why Do We Need Good Data?
- Frameworks to Understand
- SFDR & EU Taxonomy
- SBTi
- CDP
- Reporting & Greenwashing
- Case Study - GIM

MODULE 8 - CARBON MANAGEMENT

- Overview - Carbon Management
- Common Terms
- Defining Scope
- Steps to Carbon Management
- Climate Models
- En-ROADS
- Carbon Accounting
- Carbon Inventories
- Carbon Calculators
- Organizational Boundaries
- Carbon Markets
- Carbon Offsets
- Case Study

MODULE 9 - ACTION & CHANGE

- Overview - Action & Change
- Goals for Change
- Climate in the Boardroom
- Shareholder Action
- Project Drawdown
- A Roadmap for Energy
- Action Across Many Areas
- Changing Our Organizations
- Case Study - CSR



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MODULE 10 - WHAT COMES NEXT?

- Overview - What Comes Next
- Putting It All Together
- Tools to Help
- Transforming the World We Live in
- Importance of Climate Communication
- Environmental Outreach
- Lead for the Planet
- Green Teams
- Case Study - GPIF

EXAMINATION

YOUR CHARTER DESIGNATION



Chartered Institute of Professional Certification's programs are unique as they provide you with professional charter designation and mark that can be used across your lifetime once you have completed our programs.

Upon completion of the program and successfully passing the Chartered exam, you will be awarded the prestigious **Chartered Sustainable Finance Manager (CSFM™)** designation, a global trademark that carries lifelong validity and is widely recognized across industries. This distinguished credential will establish you as an expert in the field of sustainable finance, equipped with a **comprehensive understanding in navigating the complex intersection of finance and sustainability with confidence and impact**. As a result, you will be positioned to enhance your professional credibility and marketability to potential employers or clients.

Developed by the prestigious **Chartered Institute of Professional Certifications**, the **CSFM™** designation is a highly regarded industry-recognized trademark that signifies excellence in the area of sustainable finance. In addition, the program content has been independently accredited and certified by **CPD**, ensuring that it conforms to the highest standards of continuing professional development.

ABOUT US

49,525

Business Leaders Have
Attained Their Chartered
Certifications Since 2009

390

Certified and Fully
Accredited Programs

87%

Chartered Leaders Have
Reported Career Promotions
and Enhancements

Chartered Institute of Professional Certifications

All of Chartered Institute of Professional Certifications programs are fully accredited programs. The professional charters and designations are trademarked credentials that can only be used by professionals who have completed and passed our accredited program. It is also independently accredited by CPD as adhering to the highest standards of continuing professional principles.

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CONTACT US TODAY

We Thank You for Your Ongoing Support
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