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Self-paced and flexible learning  
Specialist content by global ESG experts

## **PRI ACADEMY**

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Understand how ESG issues are impacting business and investment decision-making using financial modelling, case studies, interactive spreadsheets and implementation guides.

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## Responsible Investment for Trustees

The Responsible Investment for Trustees course is brought to you by the PRI Academy. It features content from leading international experts, real life and hypothetical case studies, financial modelling, and has been designed to help maximise your understanding and practical application of key ESG concepts in the shortest possible timeframe.

The Responsible Investment for Trustees course provides you with the outlines on why responsible investment is important for trustees and board members and the steps involved to become a responsible trustee. The course sets out why sustainability or environmental, social and governance (ESG) - issues are relevant to you as a trustee or board member.

### INTRODUCTION

- Environmental and social megatrends
- Developments in fiduciary duty and the regulatory environment
- Long-term investment
- Research on ESG issues and financial performance

### INVESTMENT BELIEFS

- What are the beliefs about investment, markets and sustainability issues that guide your fund?
- Examples of investment beliefs on ESG issues from around the world

### TOOLS YOU CAN USE

- ESG integration
- Engagement/stewardship
- Investing in sustainability solutions and the real economy
- Market-wide engagement

### WRITING AND IMPLEMENTING YOUR POLICY

- Drawing together the strands to write your policy
- Setting objectives
- Resources you will need

### PUBLIC REPORTING ON RI

- What does best practice public reporting on RI look like?
- report's content
- report's quality

### ORGANISATIONAL PURPOSE AND VALUES

- Establishing the purpose and values of your fund
- Set out a process for establishing your organizational purpose and values.

### INTERNATIONAL REFERENCE POINTS

- Setting your RI policy
- Reference points for your policy – e.g. international standards

### FOCUS ISSUES: WHAT YOU CAN DO

- Climate change
- Human rights
- Inequality
- Issues that affect your fund

### WORKING WITH INVESTMENT CONSULTANTS AND MANAGERS

- How to get the best out of your investment consultants and managers to support your approach to RI
- ESG requirements in requests for proposals
- ESG requirements in investment management agreements

### MAKING IT ALL HAPPEN

- Ideas for working with your colleagues on the board and with your executive team to get RI off the ground at your fund
- Bringing it all together

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