



**University of  
Zurich** <sup>UZH</sup>  
Department of Finance

**CSP** Center for Sustainable  
Finance & Private Wealth



# CSP's Educational Programs Catalogue

*An overview of CSP's training  
programs for Wealth Holders and  
Wealth Managers*



Participants during a CSP  
training for wealth holders



# Our Educational Programs

From knowledge to action.

Our trainings enable investors and wealth managers, as key actors in capitalism, to drive positive change.



# + How CSP's Educational Courses Are Structured



**+** Wealth Holder Program

# Impact Investing for the Next Generation

More information & program video [here](#).



Participants during the 2022 - 2023 training at the University of Zurich

## Key Facts

The CSP Flagship program puts wealth holders on a path towards their own impact strategy.

- **Intended Audience:** UHNW next-gen investors and inheritors.
- **Material covered:**
  - Due diligence group exercise on a real-life impact fund with support from a mentor
  - Development of a sustainability-focused Investment Policy Statement (IPS) as part of individual coursework
  - Understanding the nuances of both financial markets and family dynamics to be able to invest with purpose
- **Duration:** 7 in-person days over a period of six months, with online group work and a rich portfolio of topical deep dives & alumni-meetings in between
- **Dates for the 10<sup>th</sup> cohort:** October 15<sup>th</sup>-18<sup>th</sup>, 2024 in Zurich and April 29<sup>th</sup>-May 1<sup>st</sup>, 2025 in Boston
- **Location:** MIT Sloan in Boston and University of Zurich in Zurich
- **Additional Benefits:** small cohorts for peer learning and access to faculty and experts, safe no-pitching environment, lifetime connection to 220+ CSP alumni (networking, mentoring, further education). Certificate of attendance from the University of Zurich and digital badge.
- **Hosted at:** MIT Sloan School of Management, University of Zurich
- **Founded with:** Initiative for Responsible Investment, Harvard Kennedy School



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## + Wealth Holder Program

# ACCELERATE: Investing for Systems Change

This is a 2.5-day intensive program that enables participants to understand what investing for systems change is and how to incorporate a systems approach into their investing.

More information [here](#).



Charly Kleissner  
Co-Founder of Tonic and  
KL Felicitas Foundation

“Systemic change is the new frontier for investors. CSP’s program is transformative, arming us with the skills and connections to address global challenges. Their approach is practical, powerful, and essential for real-world impact.”

## Key Facts

- **Intended Audience:** Wealth holders and their support staff (e.g. CIO from family office or foundation)
- **Material covered:**
  - What is systems change investing?
  - Utilizing systems change tools
  - The role of collaboration for systems change
  - Incorporating a systems lens into your investment strategy
- **Duration:** 2.5 days
- **Dates:** May 26<sup>th</sup>-28<sup>th</sup>, 2024
- **Location:** Oslo, Norway
- **Additional Benefits:** Safe, no-pitching environment, small cohorts up to 20 people for peer learning and access to faculty and experts.
- **Partners:**



## + Wealth Holder Program

# ACCELERATE: Allocating Polycapital for Impact

2.5-day intensive program that enables participants to explore what resources beyond & including financial capital they have and to start leveraging them strategically for impact.

More information [here](#).



## Key Facts

- **Intended Audience:** Wealth holders and their support staff (e.g. CIO from family office or foundation)
- **Material covered:**
  - What is polycapital?
  - Inventorying your own polycapital
  - Prioritizing what matters – what type of capital should you use for what purpose?
  - Adjusting your impact strategy – applying this to your theory of change
- **Duration:** 2.5 days
- **Dates:** October 23<sup>rd</sup>-25<sup>th</sup>, 2024
- **Location:** MIT in Boston
- **Additional Benefits:** Safe, no-pitching environment, small cohorts up to 20 people for peer learning and access to faculty and experts.
- **Partners:**

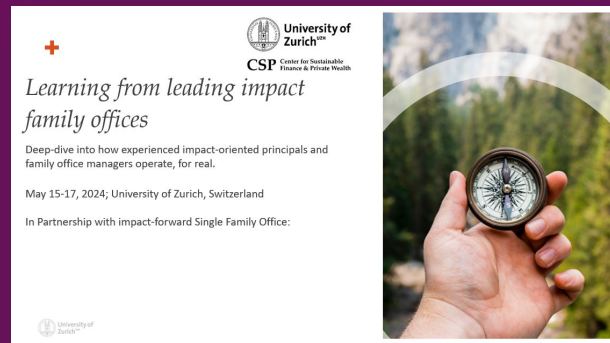


## + Wealth Holder & Family Office Program

# Learning from Leading Impact Family Offices

Deep dives into how impact-oriented principals and family office managers & principals operate, for real.

More information [here](#).



## Key Facts

- **Intended Audience:** Wealth holders and their with Family Office staff
- **Material covered:**
  - Strictly under Chatham house rules, hear directly first hand from Impact Oriented family offices about how they have developed their Impact strategy, embedded impact in their due diligence and measured their impact.
  - Discuss your own challenges in a safe space
- **Duration:** 3 days
- **Dates:** May 15<sup>th</sup>-17<sup>th</sup>, 2024
- **Location:** University of Zurich, Zurich
- **Partners:**



## + Finance Professionals Program

# Sustainable Investing in Wealth Management

For financial professionals seeking a foundational understanding of sustainable finance to better serve their clients.

This course is designed for professionals from private banks and family offices who advise clients, develop wealth management solutions or are responsible for moving forward wealth management divisions in the area of sustainable finance.

More information [here](#).



## Key Facts

- **Intended Audience:** Financial professionals with a focus on front staff
- **Material covered:**
  - Introduction to sustainable investing & achieving impact
  - Understanding client motivations and developing portfolios
  - Learning directly from wealth holders and sustainable finance experts through dialogue
- **Duration:** 15 hours over 3 days
- **Dates:** March 6<sup>th</sup>–8<sup>th</sup>, 2024
- **Location:** Hybrid set up (online and at the University of Zurich)
- **Additional Benefits:** The program is part of the SAQ Swiss Association for Quality program and 15 hours can be added towards recertification of advisors. Also includes a Certificate of attendance from the University of Zurich and Digital Badge (eg for LinkedIn).
- **Example participant employers:**

Vontobel



LOMBARD ODIER  
LOMBARD ODIER DARIER HENTSCH

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## + Finance Professionals Program

# Sustainable Investing Masterclass

1-day online training course for financial professionals, affluent and retail investors (including bank clients), corporate sustainability professionals, and consulting and advisory professionals, even with no previous foundational knowledge of finance or sustainability.

More information [here](#).



## Key Facts

- **Intended Audience:** Broad range of professionals with interest or need to understand the foundations of Sustainable Investing.
- **Material covered:**
  - Understand the 5 approaches to sustainable investing
  - Sustainable Investment portfolio construction
  - Company/investor impact
  - Biodiversity/Climate investing
- **Duration:** 1 day
- **Dates:** June 2024 | Dec 2024. See [here](#).
- **Location:** In person at the University of Zurich and online. Contact CSP For further information.
- **Additional Benefits:** Certificate of attendance from the University of Zurich and Digital Badge. The program is part of the SAQ Swiss Association for Quality program and includes a Certificate of Attendance from the University of Zurich and Digital Badge (eg for LinkedIn).

# + In-House Programs, Europe and Asia

Our in-house programs are tailored to meet the needs of financial institutions, including banks, family offices, trustees and wealth managers. Delivered globally via teams out of Zurich, Singapore, and San Francisco.

## Wealth Holders

- **Intended audience:** Bank and Family office clients and next gens
- **Customization process:** We work with organisations to develop a deep understanding of their clients and the intended audience for our in-house programs drawing from relevant units from our programs and tailoring them to be aligned with the organisation mission, values, budget and time constraints
- **Additional Services:** Many financial institutions see us as a long term partner and develop and evolve their training and service offering with CSP at their side
- **Example CSP Clients:**

Julius Bär  ACCURO

## Financial Institutions Staff

- **Intended Audience:** Senior management, front staff and investment managers
- **Tailored Training Approach:** We offer cutting edge training and practical skills based on our research and expertise aimed at augmenting the institution's sustainable investing capabilities. We achieve this by comprehensively assessing the current sustainable investing capabilities of institutions and their staff
- **Additional Services:** We offer trainings, strategic partnerships and can offer further advisory services such as creating impact policy statements and refining the sustainable investment product offering
- **Certification:** Trainings in Singapore certified under IBF requirements Level 3 and Level 4. Trainings in Switzerland SAQ certified
- **Example CSP Clients:**



# + Trainings Overview

Program	Wealth Holders	Professionals	Certified training program	Time-duration	Location	Dates
<b><u>Impact Investing for the Next Generation</u></b>	✓			High	Zurich & Boston (MIT Sloan)	Oct 15-18 2024 & Apr 29 - May 1, 2025
<b><u>Accelerate Level 2: Investing for Systems Change</u></b>	✓	✓*		Medium	Oslo	May 26-28, 2024
<b><u>Accelerate Level 2: Allocating Polycapital for Impact</u></b>	✓	✓*		Medium	Boston	October 23-25, 2024
<b><u>Learning from Leading Impact Family Offices</u></b>	✓	✓*		Medium	Zurich	May 15-17, 2024
<b><u>Sustainable Investing for Wealth Managers</u></b>		✓	✓	Low	Zurich & Online	March 6-8, 2024
<b><u>Sustainable Investing Masterclass</u></b>		✓	✓	Low	Zurich & Online	2 runs, 29 April 2024 & Q4 2024
<b><u>Custom Institutional Programs</u></b>	✓	✓	As requested	Tailored	As requested	Tailored

\*Upon invitation from wealth holder



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