TECHNICAL LEARNING AND ASSESSMENT DOSSIER

Sustainable Finance – Integrating ESG into Financial Decisions and Assessing Investment Impact

Price / certificate issuance
80,00 €
VAT excluded

Course code	Minimum duration	Final pass score	Dossier issue
FIN_ESG_LA	60 min	70%	28/11/2026

1. Course identity, purpose and scope

The course "Sustainable Finance – Integrating ESG into Financial Decisions and Assessing Investment Impact" focuses on embedding environmental, social, and governance (ESG) criteria into financial decision-making processes. It offers in-depth insights on European regulations such as SFDR, EU Taxonomy, MiFID II/IDD, and the new EU Green Bond Standard, enabling participants to acquire practical skills in metrics, disclosures, and best practices related to impact investing and stewardship. The training covers critical phases including ESG due diligence, climate risk assessment, greenwashing prevention, and application of international standards like TCFD, ISSB, and GRI. Through practical examples and real case studies, the course supports the development of investment policies aligned with regulatory requirements and sustainability goals, enhancing the ability to assess impact and measure outcomes in financial contexts. Designed for finance professionals, asset managers, insurers, banks, and intermediaries, it provides immediately applicable tools to integrate ESG criteria within credit, investment, and reporting processes.

This extended technical dossier describes the pathway as published in CIWZ Academy on the issue date. It consolidates purpose, references, learning architecture, module contents, assessment system, passing criteria and certificate conditions. It does not replace the official texts of the standards, laws, guidelines or schemes referenced.

2. Normative, regulatory and technical references

SFDR (EU Reg. 2019/2088) + EU Taxonomy (EU Reg. 2020/852) + MiFID II/IDD (sustainability preferences and product governance) + EU Green Bond Standard (EU Reg. 2023/2631) + TCFD/ISSB (IFRS S1-S2) + GRI (metrics and disclosure) + impact investing, stewardship and impact measurement best practices (KPIs/metrics)

References are used as the learning and assessment framework within the limits of published content and available sources. For professional application, the official and current versions of the referenced documents always prevail.

3. Learning architecture and assessment system

- minimum tracked time: 60 min
- active final-exam bank: 200 questions
- final exam: 30 questions selected from the bank
- passing threshold: 70%
- Direct access to the final assessment under the published rules for the exam-only pathway.
- Exam assembly from the active course bank and scoring against the published pass threshold.
- Recording of the result and, where applicable, request for the final certificate.

4. Official catalogue technical information

Learning Objectives

- Understand the European regulatory framework on sustainable finance
- Learn methodologies to integrate ESG criteria into financial decisions
- Assess environmental and social impacts via metrics and KPIs
- Know best practices for impact investing and stewardship

Skills Acquired

- Analysis and interpretation of SFDR, EU Taxonomy, MiFID II/IDD regulations
- Ability to conduct ESG due diligence in financial contexts
- Climate and sustainability risk assessment and monitoring
- Designing investment policies and consistent ESG disclosures

Target Audience

- Finance professionals, asset managers, pension funds
- Credit intermediaries, insurance companies, commercial banks
- Financial consultants and compliance officers

Prerequisites

- Basic knowledge of financial markets and investment instruments

Program

- Introduction to sustainable finance and ESG criteria
- EU regulatory and legal framework (SFDR, Taxonomy, MiFID II/IDD)
- EU Green Bond Standard and GRI reporting
- Metrics, KPIs and impact investing best practices
- ESG due diligence and integration in creditworthiness

- Climate risk assessment and greenwashing prevention
- Case studies and practical audit exercises

Teaching Methodology

- Theoretical lessons combined with operational examples
- Study of real cases and audit practice scenarios
- Quizzes and multiple-choice assessment questions

Assessment Method

- Final test requiring 70% correct answers to pass

Duration

- 60 minutes

Certification

- Certificate of completion available upon payment of €80.00

Expected Outcomes

- Effective application of ESG criteria in financial decisions
- Ability to assess sustainability impacts and risks in portfolios
- Enhanced transparency and regulatory compliance

7. Assessment system, final exam and passing criteria

- The final assessment consists of 30 questions selected from the active course bank. The platform applies an anti-repetition logic for new attempts when the bank size allows it.
- Final question-bank size detected at generation time: 200 active questions.
- Published passing threshold for the course: 70%.
- Questions are intended to assess not only recall but also interpretation, application, evidence selection, scenario assessment and quality of decision-making, depending on the subject matter.

8. Tracking, learning continuity and session integrity

- Path status, completed modules and recorded time are managed server-side when the course uses the Academy learning mode.
- The platform allows the pathway to resume from the recorded point and retains the results of required checks.
- Assessment sessions may be subject to the integrity and proctoring controls enabled by the platform and described in the applicable usage rules.
- Technical and integrity events support assessment and do not replace professional judgement where human review is required.

9. Certificate, use and limitations

The CIWZ certificate, where provided by the pathway and requested after passing, records the result achieved in the stated CIWZ pathway or assessment. It does not automatically replace personnel certification, professional registration, statutory licence, legal qualification or credentials issued by third-party bodies where such requirements are imposed by the applicable scheme.

10. Commercial and tax conditions

- Price / certificate issuance: 80,00 € VAT excluded.
- UAE VAT is applied to UAE customers according to billing data and the applicable tax rules.
- Any specific commercial terms, agreements or corporate orders override the public price only when formally accepted by Certificato IWZ FZCO.

11. Dossier document control

- Document automatically generated by CIWZ Academy from the course data published at the time of the request.
- Course code: FIN_ESG_LA
- Document language: EN

- Generation date: 28/11/2026
- For normative and professional application, the current official sources and any applicable procedures/schemes prevail.