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UKSIF's Free Online Training Course for Financial Advisers now Available

The UK Social Investment Forum (UKSIF) has launched two new, free support services for financial advisers:

- An **online training course** on green and ethical investment
- **"The Financial Adviser's Guide to Going Green"**, with tips for advisers on greening their business and reducing their carbon emissions.

All advisers who pass the course by the end of April can be entered into a free prize draw for one week's free use of a hybrid car or one year's offsetting of their business carbon emissions.

Highlighting the soaring demand for advice on green and ethical investment, Penny Shepherd, UKSIF Chief Executive says "More and more people are interested in considering ethical or environmental funds. Now, thanks to UKSIF's new online course, all advisers can get a good grounding in how to help them."

With green issues hitting the headlines, it also makes increasing sense for advisers to do their bit to combat climate change. UKSIF's '*Adviser's Guide to Going Green*' will help them achieve this while gaining credibility with clients who care about these issues.

Four leading providers of green and ethical investment funds have supported the development of these services – Friends Provident, Henderson Global Investors, Jupiter Asset Management and Norwich Union. The programme is also supported by the Government's "Sector Sustainability Challenge", which works with trade associations to help businesses that want to go green. The online course was developed by Taxbriefs, the leading training and support provider for the IFA market.

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Editors Notes

The UK Social Investment Forum (UKSIF) is the UK's membership network for socially responsible investment (SRI). UKSIF's primary purpose is to promote and encourage the development and positive impact of SRI amongst UK based investors. UKSIF believes that all material social, environmental and ethical (SEE) issues should be integrated into standard investment practice and that individual investors should be able to reflect their values in their investments.

The Forum was launched in 1991 to bring together the different strands of SRI nationally and to act as a focus and a voice for the industry. UKSIF's 200+ members and affiliates include retail and institutional fund managers, financial advisers, SRI research providers, consultants, trade unions, banks, building societies, community development finance institutions, NGOs and individuals interested in SRI. For information about the UK Social Investment Forum, visit www.uksif.org.

About the Online Training Course and the Adviser's Guide to Going Green

Both new services are available at www.uksif.org.

The free online training course on green and ethical investment is also available at http://www.uksif.org/consumers-advisers/online_course. It is based on UKSIF's Toolkit '*Investing Responsibly: A Practical Toolkit for Financial Advisers*', which has already helped advisers to respond to the rising demand for green and ethical investment. The online training course covers UKSIF's 5-step model for advising on green and ethical investment, describes ethical investment issues that may be of interest to clients, explores risk and performance aspects and outlines the different approaches adopted by fund managers. Advisers can also take an online test on green and ethical investment and print out a certificate of course completion once they have passed it.

'The Adviser's Guide to Going Green' is also available at http://www.uksif.org/consumers-advisers/advisers_guide_to_going_green. The Guide shows simple steps that advisers can take to green their business. It will help them to be more credible to the growing number of clients concerned about green issues as well as doing their bit for the environment. The Guide includes practical tips, such as how to choose greener cars, buy recycled and save energy.

For comments from the sponsors, please contact the following:

- **Friends Provident:** Julia Dreblow, SRI Marketing Manager, tel. 07802 642065, email: julia.dreblow@friendsprovident.co.uk, URL: www.friendsprovident.co.uk

- **Henderson Global Investors:** Nick Robins, Head of SRI Funds, tel. 0207 818 4356, email: Nick.Robins@henderson.com, URL: www.henderson.com
- **Jupiter Asset Management:** Emma Howard Boyd, Director, Head of Socially Responsible Investment, tel. 020 7314 4772, email: Ehowardboyd@jupiter-group.co.uk, URL: www.jupiter-group.co.uk
- **Norwich Union:** James Dalby, Head of Marketing Fund Propositions, tel. 01904 45 2244, email: james.dalby@norwich-union.co.uk, URL: www.norwich-union.com
- **Defra:** Gerry Duignan, Sustainable Production, tel. 020 7082 8671, email: gerry.duignan@DEFRA.GSI.GOV.UK, URL: <http://www.defra.gov.uk/>

About the Government's Sector Sustainability Challenge

Recognising the continuing need to integrate sustainability into business practice and the products / services they provide, the government runs the Sector Sustainability Challenge, which helps business sectors to deliver practical actions addressing sustainable consumption and production. This forms part of its commitment to "doing more with less" reflected in its Sustainable Development Strategy "Securing the Future" and its drive for more sustainable patterns of consumption and production. The Sector Sustainability Challenge is supported by the Department for Environment, Food and Rural Affairs (Defra) and the Department of Trade and Industry (DTI). (<http://www.defra.gov.uk/environment/business/scp/actions/challenge.htm>)

About Increasing Demand for Advice on Green and Ethical Investment

Three times as many consumers sought advice on ethical investments in January 2007 compared with two years previously, according to IFA Promotion. The number of people seeking advice on ethical investment through IFAP's website, www.unbiased.co.uk, rose from 311 in January 2005 to 940 in January 2007. Over the same time period, the proportion of IFAP members listing "Ethical Investment" as an area of specialism doubled from 6% to 12%. For further information, contact Karen Barrett, Marketing Director, IFA Promotion, tel. 020 7833 3131, karen@ifap.org.uk.

On 11 January 2007, F&C Investments published new research from a survey conducted done the previous month on the public appetite for green investing. They found that almost half of the public – some 48% of those surveyed – expressed an interest in investing ethically, demonstrating the opportunity for advisers. Avoiding companies operating in countries with poor human rights topped the list of concerns, followed closely by avoiding companies that damage the environment, according to the research. Details from Karolina.Adamkiewicz@fandc.com or sarah.deutscher@fandc.com.

Recent years have witnessed considerable growth in ethical and green investment. Data from EIRIS about UK ethically screened funds shows:

- £6.1billion held at 31 December 2005 - up from less than £1.5 billion in 1997.
- Held in about 500,000 accounts – up from c. 137,000 accounts in 1997.

EIRIS is in the process of compiling its annual 'size of market' figures for 2006 and these are expected to show a significant increase in the amount of retail money invested ethically".

Details at www.eiris.org/files/press%20releases/recordethicalinvestmentjul06.pdf, and <http://www.eiris.org/files/press%20releases/recordnumberofethicalptions07.pdf>. Further data at www.eiris.org and then see "Key facts & figures".

About why financial advisers should green their business

Nearly three quarters of UK consumers are concerned about climate change and their own carbon footprint, and two thirds want to know the carbon footprint of the products and services they buy. Almost two thirds of UK consumers are more likely to buy from a business they think is taking action to tackle climate change, according to research from the Carbon Trust in November 2006. (see http://www.carbontrust.co.uk/about/presscentre/2006/061106_consumers.htm)