



UKSIF provides free training for IFAs on responsible investment

UKSIF will be running free training events for independent financial advisers (IFAs) on responsible investment in mid-May 2006.

The half-day seminars, which will be held throughout the country, will provide IFAs with:

- A summary of the business benefits and opportunities for IFAs and an opportunity to learn lessons from IFAs with ethical business.
- A practical IFA toolkit on responsible investment, including a 5-step advice model, a 24-page Technical Guide and 2 personal fact-finds.
- A case study session, designed to enable IFAs to consider how they would advise their clients on responsible investment issues.
- An opportunity to listen and network with product providers, who will highlight their 'ethical' and 'responsible investment' funds.

As well as providing valuable CPD points, the training event will also provide information to help IFAs meet the requirements under ISO 22222 that relate to responsible investment.

The dates of the seminars are:

11 May 2006: 9.30am – 1.00pm (with lunch from 1.00pm): Bristol

17 May 2006: 9.30am – 1.00pm (with lunch from 1.00pm): Birmingham

18 May 2006: 9.30am – 1.00pm (with lunch from 1.00pm): Manchester

23 May 2006: 9.30am – 1.00pm (with lunch from 1.00pm): London

For further information and to register for the events, please e-mail info@uksif.org or contact 020 7749 9952.

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UKSIF PRESS NOTICE: FOR IMMEDIATE RELEASE

Notes to Editors

1. 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. UKSIF's 200+ members and affiliates include institutional and retail fund managers, pension funds, independent financial advisers and a wide range of other organisations. For further information about UKSIF visit www.uksif.org.
2. UKSIF's *Toolkit on Responsible Investment* includes a 5-step advice path, two personal ethical fact finds and a 24-page technical guide. The Toolkit was developed with input from UKSIF's product providers and IFA members, including the Ethical Investment Association. It was funded by Friends Provident, CIS, Jupiter and Morley.
3. To qualify for ISO 22222 – the international standard in financial planning – IFAs will be required to demonstrate an understanding of responsible investment.
4. Newly qualified advisers will have a grounding in ethical and socially responsible investment further to the recent inclusion of ethical and socially responsible investment in the IFS' CeFA 2 and CII's CF2 exams on investment & risk (following the Financial Services Skills Council exam review). However, recent research shows that ethical and responsible investment is not being included in CPD for existing advisers.
5. The market for ethical and environmental consumer products and investments is growing. Screened ethical investments totalled £5.5bn in December 2004 – growing from £792 million ten years ago - with over 450,000 customer accounts (EIRIS, December 2004 - information based on figures from the Investment Management Association, fund managers themselves, and in some cases, estimates based on previous fund sizes. See www.eiris.org.