

Case Study.
Federated Hermes.
United States.
Asset Management.

Empowering the investment community with ESG education and encouraging the sale of responsible financial products

Federated Hermes is a leading global investment manager with over \$600 billion in assets under management. The firm is a global leader in active, responsible investing and recently announced the launch of the Responsible Investing Institute to train members of the investment community about the topics of responsible investing and the role of environmental, social, and governance (ESG) factors in investments.

Challenge

Federated Hermes wanted to develop an instructive and interactive multi-course curriculum on incorporating ESG consideration in their portfolios. The programme would be comprehensive and actionable, as well as eligible for continuing education credits.

Solution

dss+ created a web-based three-course curriculum, for Federated Hermes that covers ESG 101, ESG Data and Investment Implementation, and ESG Business Implementation for Investment Advisors. The purpose of this program is to educate investment advisors on how to identify key concepts of ESG, uncover the link to alpha, understand and navigate ESG integration practices, and talk with new clients and existing clients about ESG. This curriculum is available to the public via the link below.

Links to deliverables: <https://info.federatedinvestors.com/Responsible-Investing-Institute.html>



Assignment

Develop a course on the fundamentals of responsible investing for investment advisors.



Offering

ESG training, web-based learning solution, Responsible Investing advisory.



Impact

Delivered a web-based, comprehensive three-module ESG training curriculum for investment advisors that is eligible for continuing education credit.



dss+

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