

2026

Sustainable Investing Capacity-Building Solutions

FOR FINANCIAL ADVISORS



ED4S.org

Turning Sustainability Knowledge into Business Advantage

CLIENT NEEDS AND INVESTMENT PRODUCTS ARE EVOLVING



Investors in Canada are increasingly prioritizing responsible investment: **two-thirds express interest in sustainable investing** and nearly half plan to add sustainable investments to their portfolios in the next two years, yet most advisors are not ready to have meaningful discussions with their clients about it.

This gap between **investor demand** and advisor engagement, compounded by concerns about **greenwashing** and **transparency** underscores why sustainability competency has become a **core financial literacy** for advisors to protect credibility, strengthen client relationships, and seize growth opportunities.

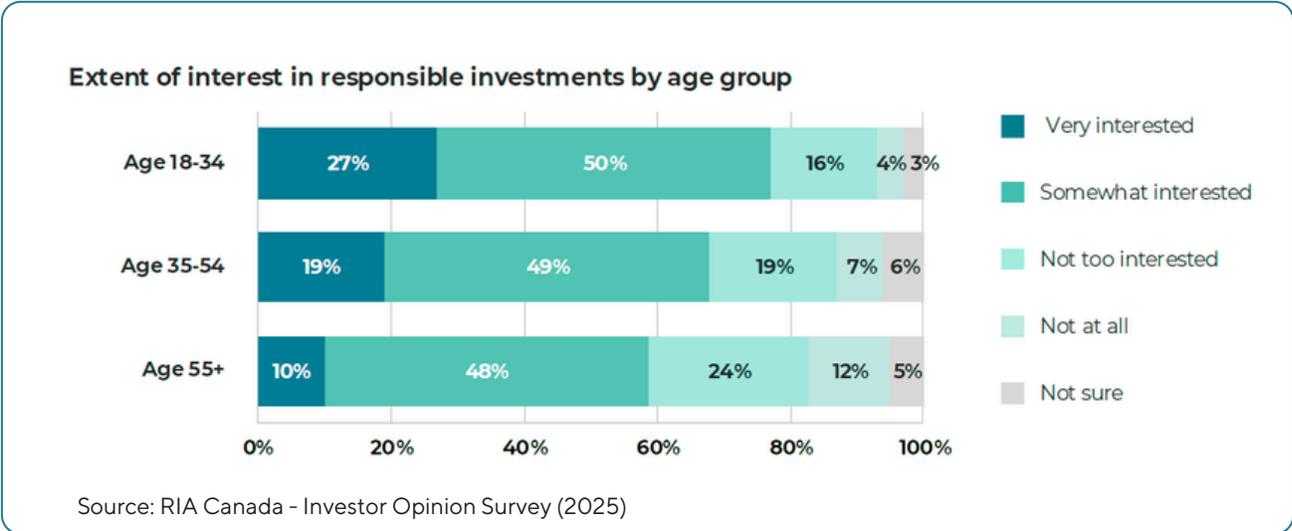
ARE YOUR ADVISORS PREPARED?

Clients are shifting priorities:

- From “performance at all costs” → to “performance with purpose”.
- ESG concerns (climate, diversity, governance) remain a priority regardless of political shifts.
- Younger generations, women, and values-driven clients are seeking advisors who get sustainability.
- Advisors must evolve to retain trust and attract new clients.

Investors expect it, and firms can't afford greenwashing missteps. Sustainability training helps advisors build credibility, protect their reputation, and confidently guide clients on ESG and responsible investments.

RETAIL INVESTORS ARE INTERESTED IN SUSTAINABLE INVESTING



SUSTAINABILITY TRAINING GOAL

Goal 1 Establish ESG Readiness Baseline

Clients are increasingly asking about ESG, yet many advisors avoid the topic due to lack of confidence, risking misinformation, regulatory breaches, and lost client relationships. Training ensures a **consistent baseline**: advisors can confidently handle ESG questions, understand that sustainable investing extends beyond exclusionary screening, and comply with regulatory requirements such as **MiFID II** suitability rules and **SFDR** disclosure obligations, meeting client expectations before they turn to competitors.

Goal 2 Create a Competitive Differentiator

For advisors aiming to be **holistic wealth professionals**; offering insurance, estate planning, and full financial solutions. ESG capabilities are a powerful **value-add**. Sustainability training equips advisors to integrate ESG into their offerings, helping them stand out and stay competitive in a rapidly evolving market.

Challenges of Sustainability Training

- **Rapidly Outdated Content:** ESG regulations, data, and investment practices evolve quickly, making traditional programs stale and resource-intensive to maintain.
- **Theoretical Focus:** Advisors often understand the theory but lack practical tools to apply ESG insights in real client conversations.
- **High Internal Resource Demand:** Keeping programs current typically requires significant time from internal ESG teams.

ED4S SOLUTIONS

Scalable, customizable, white-label training that keeps advisors current, confident, and ready to apply ESG in practice while minimizing internal resource demands.



SI Readiness
assessment



E-learning



Practice





SI Readiness assessment

Purpose: Measure advisors' current knowledge and identify skills gaps in sustainable investing.

What it covers: 40-question quiz assessing KYC, KYP, suitability, and fund due diligence.

How it works: Employers purchase seats by cohort; we manage enrollments, communications and provide detailed reporting on advisor performance, gaps, and insights to inform targeted support.

Pricing:

Cohort of 30 participants: \$2,500 CAD

Additional participants: \$50 each (volume discounts available)

Outcome: Actionable analytics to strategically upskill advisors.

Optional Internal Assessment Add-on

ED4S conducts up to 5 stakeholder meetings with key teams: advisors, product, sales, L&D, and solution providers to identify ESG tools /training suitable for your organization, challenges, and support needs.

We deliver a concise, **actionable report with recommendations** to strengthen ESG readiness across your organization, providing a holistic view beyond training content.

Pricing: \$14,000 CAD

Outcome: Provides a clear view of ESG readiness, identifies gaps, and delivers actionable recommendations to strengthen advisor capabilities and internal alignment.



E-Learning: Self-Paced 30-min course

Purpose: Provide scalable training on sustainable investing fundamentals.

What it covers:

- Rising demand for sustainable investing
- Fiduciary duty considerations
- Investment strategies and fund performance
- Latest regulations and ESG data developments

Delivery options:

- Deploy on ED4S LMS or client's LMS
- White-label options available
- Bilingual: English & French

Pricing:

- On client LMS: \$15,000 CAD/year
- On ED4S LMS: \$50 CAD/advisor (volume discounts up to 30%)

Outcome: Foundational ESG Literacy; advisors understand key sustainable investing concepts, strategies, and terminology.

Optional: Advisor Enablement Workshop

Purpose: Hands-on virtual session for practical application of sustainable investing.

What it covers:

- Client discovery, suitability, and fund due diligence
- Developing ESG-focused client questions
- Using tools like Morningstar Advisor Station to filter ESG funds
- Applying CIFSC classifications in practice

Format: Live, expert-facilitated, interactive session

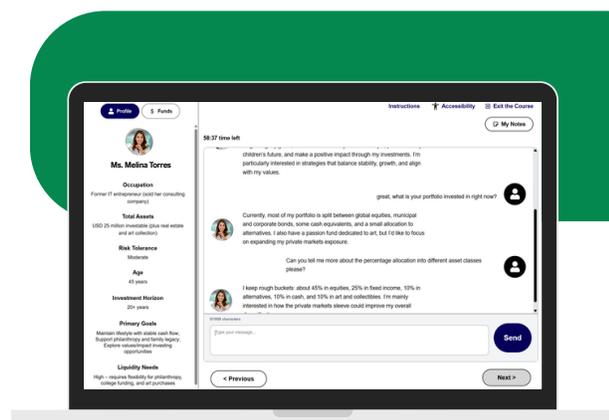
Pricing: \$3,000 CAD / virtual session (up to 30 participants)

Outcome: Advisors leave with practical tools and confidence to integrate ESG into client conversations.

ED4S CAPACITY BUILDING SOLUTIONS



Practice ADVISORSIM



An AI-powered, scenario-based training platform that elevates client conversations and delivers real-time skills gap analytics. Designed for wealth managers, financial advisors, lenders, and insurance brokers; anyone in a client-facing financial role.

Purpose: Equip advisors to translate knowledge into results by practicing client conversations in a risk-free environment, with personalized feedback that drives measurable improvements in confidence, accuracy, and client engagement.

What it covers:

- Realistic scenarios with three client personas
- Personalized performance assessments
- Hands-on practice beyond sustainable investing (broad advisory skills)

Admin capabilities: Track advisor readiness, skills gaps, and strategic upskilling opportunities.

- **Integration:** SSO support, client-specific funds inclusion
- **Proven trust:** Used by CFA Institute for wealth advisor training
- **Pricing:** Starting at \$30,000 CAD/year

Outcome: Strengthens client conversation skills through realistic practice and personalized feedback, delivering measurable improvements in advisor confidence, suitability analysis, and ESG communication.

ED4S APPROACH

At ED4S, we are **financial professionals** who understand the challenges of sustainability training. We've designed solutions to overcome each one, helping organizations make training effective, engaging, and manageable.

Business-relevant sustainability | We define sustainability in direct relation to the financial sector, focusing on investor expectations, regulation, risks and opportunities, and value creation. This helps employees clearly connect sustainability to their roles and decisions.

Targeted and role-specific | Training can be scoped to specific roles or teams, ensuring high relevance and immediate applicability.

Short, high-impact formats | Sessions are concise and focused (30–90 minutes), designed for professionals who need to understand, contribute, and identify opportunities—without becoming subject-matter experts.

Grounded in financial materiality | All content is anchored in financial materiality, keeping the focus on what matters most to the business, such as cost savings, risk management, and performance.

Always up to date | We monitor regulatory and market developments, updating content within one month of major changes and refreshing it at least every 18 months.

Practical, tailored, and engaging | We combine off-the-shelf efficiency with tailored impact, and work closely with clients to leverage internal communication channels and key stakeholders to drive strong engagement and uptake.



ABOUT ED4S ●

OUR MISSION

To help financial sector build practical sustainability skills, close ESG knowledge gaps, and create measurable impact through engaging, role-specific learning.

OUR CLIENTS

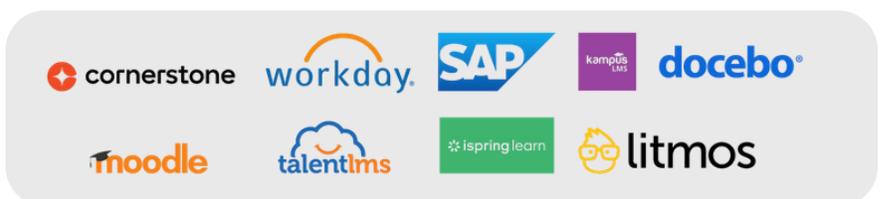
- Desjardins
- Sun Life Canada
- National Bank of Canada
- Beneva
- Laurentian Bank
- Swift
- Optimum Asset Management
- Principal Asset Management
- Finance Montreal
- Promutuel

CPD CERTIFIED

Best Practice in Adult Education



SEAMLESS INTEGRATION WITH LMS



Contact: hi@ed4s.org