ACT adviser competency training for social investment

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The best way to understand a great idea is to ACT

WHAT IS ACT?

The Adviser Competency Training (ACT) for social investment manual has been designed to prepare you for investors increasingly targeting a blend of positive financial and social outcomes. By completing this course, you will be equipped with the skills and knowledge to meet the rapidly growing client appetite for this advice, gaining a marketable advantage and securing increased market share.

WHO SHOULD STUDY ACT?

This manual is aimed at financial advisers who wish to engage in the area of social investment.

Currently, applicants should show:

- A minimum of two years' client service experience (not necessarily client-facing)
- Client service experience to include the preparation and delivery of a financial plan:
  - goal identification and prioritisation
  - recommendation of solutions
  - investment recommendations.
- A desire to understand social investment and its potential role within the financial planning process
- Achievement, or be in the process of achieving, a minimum Level 4 professional qualification.

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ENHANCING CREDITABILITY AND MARKETABILITY

As a result of this course you will be able to:

- Develop the effective and powerful questions to uncover your clients' social objectives
- Engage in insightful values-based investment discussions with clients helping develop deeper relationships and relevance
- Build a compartmentalised and complete social impact investment process; keeping it simple, robust and standardised
- Incorporate SITR as a tool within the financial plan from an understanding of the unique benefits and risks to be considered when utilising this investment type
- Evidence competence by identifying and communicating with clarity the different types of social investment products and associated risks.

SYLLABUS

- Understanding and identifying your client's social goals and motivations
- Comparing types of investment products to achieve social objectives
- Segmenting the client's investment pot and explaining risk
- Blending social impact investments within an investment portfolio
- A comprehensive technical guide to Social Investment Tax Relief (SITR)
- Measuring and reporting social impact for investors and advisers.

HOW IS ACT STRUCTURED?

30hrs to complete

The manual is currently available only in hard copy and we estimate that **it would take 30 hours to complete** self-guided study via this manual.

You will be entitled to receive a **Certificate in Social Investment and accompanying marque** providing you achieve a 90% pass mark via an open-book, 70-question, multiple choice assessment.

Q: A:

This assessment is carried out by completing the **Test Question Answer Sheet** provided at the end of the manual and scanning or posting a copy to the Worthstone offices.

Assessment can be **completed at any time** following purchase of the most recent edition of the manual and costs are included in the price of the manual.

FURTHER INFORMATION

We are currently in discussion with the professional bodies to accredit the manual as structured CPD.
For any further FAQs you may have, please visit our **FAQ page** on our website.

PRE-ORDER NOW! Visit:

www.worthstone.co.uk/adviser-competency-training

and order today!

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inspiring impact investment