

Vontobel launches cooperation with AZEK in the field of ESG

Media release

- Vontobel is the first major Swiss financial services provider to launch a cooperation with AZEK in the ESG for Client Advisors training program
- Since the beginning of 2021, AZEK has been offering the online training program ESG-CA for Client Advisors
- Until February 2022, approximately 300 employees from the Wealth Management division of Vontobel will complete the training program.

Zürich, November 29, 2021 – Vontobel is the first major Swiss financial services provider to launch a cooperation with AZEK in the ESG for Client Advisors training program.

ESG-program specifically for client advisors

Since spring 2021, AZEK has been offering the online training program leading to the ESG-CA Certificate for Client Advisors. ESG-CA provides the necessary knowledge on ESG (Environmental, Social, Governance) in a well-structured form. Today, clients expect sustainable investment solutions that are also attractive from a financial point of view. The inclusion of ESG criteria in investment decisions requires financial professionals to have the necessary knowledge about sustainable investments and the interplay of ESG factors. The ESG-CA course qualifies advisors to competently inform their clients about ESG and to suggest the right sustainable investment solution for them.

Andreas Jacobs, CEO of AZEK, explains: "With CESGA® we are closing a gap in the educational landscape for financial professionals. We are pleased to be able to contribute to the stronger anchoring of sustainability in the financial sector".

Broad-based training initiative

Until February 2022, approximately 300 client advisors and investment consultants will acquire the ESG certificate. The bank's first candidates successfully passed the examination in October 2021.

Daniela Diethelm, Head of Wealth Management Germany, Austria, UK, Nordics & Overseas comments: "We want to set an example with the training initiative. We expect our advisors to be able to advise clients competently and sustainably on ESG issues as well. We want to respond to our clients' concerns in a constant dialogue and interesting exchange. It is our goal to take a pioneering role in this and to give sustainability the right priority." The participants emphasised the topicality and the comprehensive view of the subject.

As a global investment company, Vontobel has continuously developed its product offerings and its expertise in sustainable investments since the 1990s. This commitment was once again recognized in

2020: Vontobel was named the best Swiss asset management company at the Swiss Sustainable Funds Awards (SSFA). Vontobel has been a signatory to the PRI since 2010.

Contact AZEK

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About AZEK

The AZEK Training Centre for Financial Professionals was founded in 1990 by the Swiss Financial Analysts Association SFAA. AZEK is a leading provider of financial education in Switzerland. As of today, AZEK has developed over 5,000 financial professionals to highly qualified specialists in financial analysis & portfolio management, wealth management, financial market operations, financial data science and ESG. The training programs combine comprehensive theoretical knowledge with a strong practical focus and can also be completed in online format. Graduates with Federal and International Diplomas benefit from a broad range of further education opportunities.

About Vontobel Wealth Management

At Vontobel, we actively shape the future. We create and pursue opportunities with determination. We master what we do – and we only do what we master. This is how we get our clients ahead.

As a globally operating financial expert with Swiss roots, we specialize in wealth management, active asset management and investment solutions. We empower our colleagues to take ownership of their work and bring opportunities to life. Because we are convinced that successful investing starts with assuming personal responsibility. We relentlessly question the achieved, striving to exceed the goals and expectations of our clients.

The registered shares of the Vontobel Holding AG are listed on the SIX Swiss Exchange. The Vontobel families' close ties to the company guarantee our entrepreneurial independence. We consider the resulting freedom an obligation to assume social responsibility as well.