



Cooperation between AZEK and BRP Bizzozero & Partners in the area of ESG for compliance with SBA self-regulations

Media release

The AZEK [ESG-CA Investments](#) course and the BRP seminars on ESG ([Wealth Management](#) and [Asset Management](#)) teach

- the necessary knowledge to cover all the relevant topics set out in **Art. 15 of the SBA Self-Regulation**;
- both the **technical** and the **legal** aspects are covered.

Zurich/Geneva, 25 January 2023 - AZEK and BRP Bizzozero & Partners are launching a collaboration to cover the ESG education requirements of FinSA and the SBA self-regulations.

Acquire necessary ESG knowledge according to individual needs

The joint effort enables financial professionals and their employers to acquire the necessary ESG knowledge tailored to their individual needs: AZEK covers all requirements of the SBA autoregulation, including an overview of the relevant regulatory aspects mentioned. For a more thorough understanding of the legal and regulatory developments (art. 15 b, d, e, and f), BRP Bizzozero & Partners offers Wealth and Asset Management seminars on ESG.

The SBA Guidelines

On 28 June 2022, the Swiss Bankers Association (SBA) published a new guideline for the financial service providers on the integration of ESG-preferences and ESG-risks into investment advice and portfolio management. In its autoregulation, the SBA emphasizes, in accordance with FinSA, the need for appropriate training and knowledge about sustainability, ESG-investment solutions and applicable ESG approaches. The autoregulation came into effect as of 01.01.2023.

Financial service provider will have to provide training for their staff in all of the following areas:

- a) Basics of ESG, including different ESG-risks;
- b) Overview of international principles and regulations;
- c) Knowledge of the ESG-approaches followed by the financial service provider in investment advice and portfolio management;
- d) Specific knowledge and understanding of how the offered ESG-investment solutions satisfy the client's ESG-preferences;
- e) Knowledge of how existing investment solutions can be transitioned into ESG-investment solutions;
- f) Basic understanding of greenwashing and how to avoid it.

Given the importance of the topic and the challenges for Swiss-based financial institutions, AZEK and BRP Bizzozero & Partners have been providing ESG trainings to their respective clients for several years. AZEK integrated the ESG topic in its established training programs for analysts, wealth managers and financial market operators and developed two ESG certificate courses for client advisors. BRP

Bizzozero & Partners developed its ESG E-learning and its regulatory monitoring on sustainable finance in Switzerland with cross-border perspectives.

As a response to a growing demand among financial institutions to comply with FinSA and the SBA's autoregulation, AZEK and BRP Bizzozero & Partners joint their effort to contribute even better to the stronger anchoring of sustainability in the financial sector.

About AZEK's ESG offering

The AZEK training centre for financial professionals successfully launched the [ESG-CA Investments](#) course, qualifying client advisors to competently inform their clients about ESG and suggest the right sustainable investment solution for them. In May 2022, AZEK completed its offer with an additional course in the field of mortgages and financing: the [ESG-CA Lending](#).

- Format: four online seminars of two hours each, conducted live
- Language: French or German, (English on request)
- Certification / Recognition: The ESG-CA certificate is awarded on successful completion of the MCQ exam.
- SAQ: Accredited for SAQ re-certification
- Schedule: offered twice per year in German and French
- Cost: CHF 1'200 for the course (4 seminars)

Andreas Jacobs, CEO of AZEK, explains: "With this cooperation, we complement and deepen the offering in the regulatory area. We are pleased to be able to contribute to the stronger anchoring of sustainability in the financial sector".

About BRP & Bizzozero Partners' ESG offering

As of 2023, BRP Bizzozero & Partners launches two new seminars on the ESG issues in [Wealth Management](#) and in [Asset Management](#). The seminars focus on ESG legal and regulatory developments in Switzerland with reference to the situation in the UE. The seminars enable employees and managers of financial institutions to evaluate the challenges of the current self-regulations in the field of asset/wealth management as well as the regulatory implications of an ESG strategy at the level of services and products.

- Format: two seminars of two hours each, conducted live
- Language: French or German
- Certification: each seminar is concluded with an MCQ exam
- SAQ: Accredited for SAQ re-certification
- Schedule: January 30, 2023, for the French seminars (in presence); the rest of dates in French and German (webinar): tbd
- Cost: CHF 300 for each seminar

For Patrick Genazzi, CEO of BRP Bizzozero & Partners, "this cooperation aims to provide financial institutions with the necessary skills, knowledge and know-how when dealing with ESG issues, from daily routine questions to more complex regulatory analysis."

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