In collaboration with

VU Amsterdam

TIAS School for Business and Society

The RBA program is powered by

CFA Society VBA Netherlands

RBA Program

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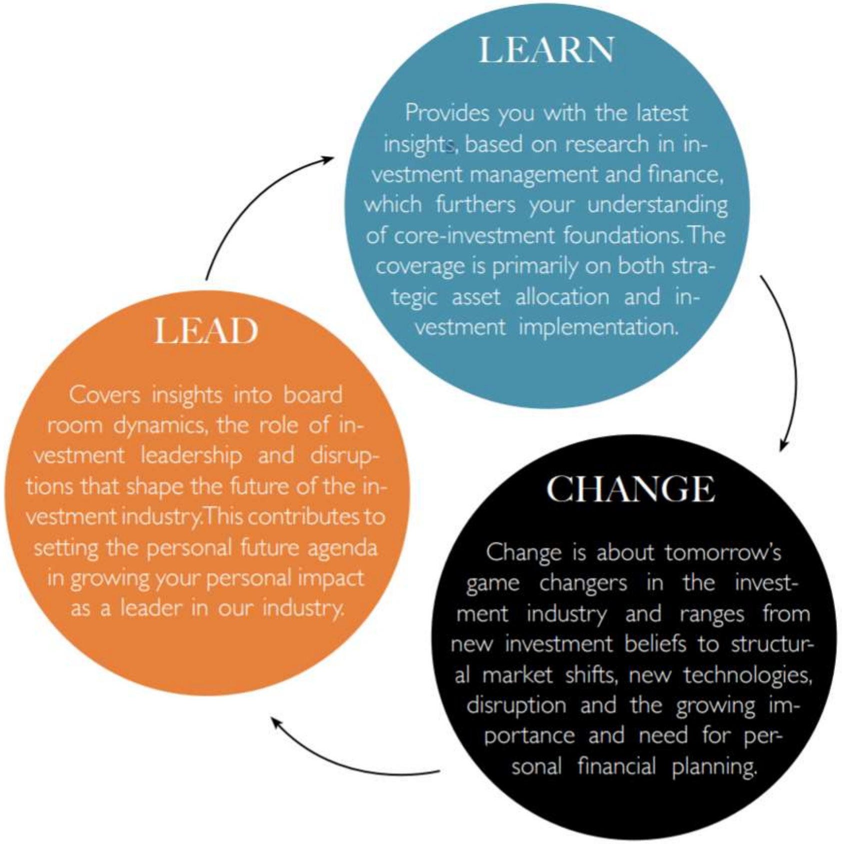
RBA Program

The RBA Program is a modular program, tailored to the experienced investment professional. The intensive world-class curriculum combines case studies, experiential projects and a variety of activities that make the RBA program a unique experience.

The program adapts to your needs. Interactive modules are combined in a 2.5-year track, where you can adjust the planning that fits best with your working schedule.

Our beliefs

The modules of the RBA program form a consistent portfolio and will boost personal development and professional growth. The RBA program constitutes different sets of modules around the pillars Learn, Change and Lead.



Design of the RBA program

The RBA program is designed as an integral, complementary program with modular certification. The RBA program consists of 12 modules. Completion of an individual module, after successfully passing the exam or rounding off the final assignment, qualifies for the relevant certificate.

Completion of all 12 modules qualifies for RBA designation. The RBA accreditation is reserved for CFA Society VBA Netherlands.

LEARN modules

in collaboration with VU Amsterdam

1. Understanding clients and behaviors
2. Regulatory dynamics and practical implications
3. Advanced asset allocation
4. Balance sheet management
5. The future of manager selection, monitoring and evaluation

CHANGE modules

in collaboration with TIAS School for Business and Society

6 Enhanced sustainable investment in practice

7 Impact and long-term investing

8 New investment technologies

9 Lifecycle investing and DC management

LEAD modules

10 Understanding boardroom dynamics and interaction

11 Investment innovation and change management

12 Growing your investment leadership

Module 7

Impact and long-term investing

- Relevancy
- Topics
- Module Set-up
- About TIAS

Relevancy

1. Rethink underway – how to embed long-term investing choices within their portfolios and create impact?
2. Challenge: implementing integral long-term, sustainable perspective requires simultaneous work on different (investment) levels.
3. Need for practical frameworks for pension board members, asset managers, private offices, to bolster long-term investing.
4. Long-term: extends beyond illiquid. Emergence of core “strategic portfolios”, with public equity holdings as long-term, illiquid holdings.
5. Opportunity: impact investments moving to the center stage. How to successfully select, manage, and grow to generate positive, measurable social and environmental impact alongside a financial return.

Approach

Investment Strategy Perspectives

Learn “bottom-up” from innovations in main asset classes

Portfolio Management Perspectives

Topics developing the knowledge and skills from an asset owner, advisor perspective

Learning goals

1. Core concepts of long-term investing: interaction between ESG and Role of Long-Term Value Creation, how it is applied within strategies.

2. How to position impact investing, compared to other assets. Selection, (co-) creation, monitoring of impact, how to “grow the pie” for impact, identifying hurdles and how to mitigate them.

3. Learning from other investment organizations what makes them stand out / successful in long-term investing and translating these insights to own organization.

4. Understanding board room dynamics: how to to develop, nurture and maintain a long-term perspective. How to do this? What are experiences, tools, behavioral pitfalls to avoid?

5. In-depth discussions on selected assets: strategic equities, real estate, impact.

Vba Academy

In-depth cases

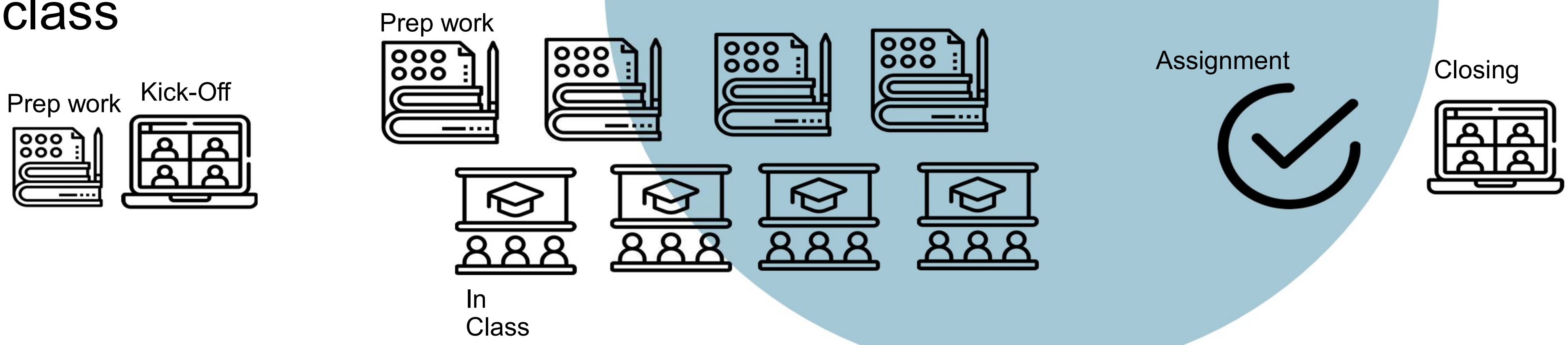
Working with case studies and experienced investors, we explore the transition to, and integration of, sustainability for the following asset classes.

What are the opportunities / challenges with this asset class when integrating long-term investing?

What does literature / research tell us? What insights can disseminate to other assets?

Module Set up

Active online preparation to enhance discussions and learning in-class



Online Kick-Off and
Prep Work

4 In-class sessions. Each session has preparatory work: online articles, smaller assignments to prepare cases in groups with other participants.

Hand In Assignment

Online Closing
Session

4 ECTS, 112 hours in
total,

Vba Academy

Module Set-up

The module has an estimated study load of 112 hours (4.0 ECTS) in total (10 subsequent weeks of 10-12 hours).

- Online session
  - Kick-Off, 1.5-hour, January 12 from 16:30 to 18:00
  - Closing session, 1 hour, to be planned
- 4 in-class lectures, in-class days at TIAS Utrecht from15:00 to 21:00
  - January 20
  - February 2
  - February 16
  - March 9
- Study, preparatory work
  - pre-readings in preparation of in-class lectures
  - assignments in preparation of in-class lectures
  - working on the take-home assignment case

Faculty

WOUTER SCHEEPENS

LT Board Room Dynamics

- Expert on sustainability, impact, governance and boardroom advice
- Founding partner of Steward Redqueen.
- Adjunct professor at TIAS, School for Business & Society.
- Author of ‘Sustainability in the Boardroom’

DIRK BROUNEN

Real Estate as LT Investment

- Professor of Real Estate Economics Tilburg University, TIAS Business School
- Research on risk and return of real estate investments, economics of energy efficiency.
- Supervisor, advisor institutional organizations

MARCEL JEUCKEN

Developing, implementing LT strategies with Impact

- Expert in finance and sustainability,, assists organizations on their sustainability strategies.
- Advisor, supervisor, executive roles in international organizations like PRI, Eumedion, IIGCC, ICGN.
- Author on books on sustainability and finance

STANLEY ANYETEI

Impact investments: selecting, monitoring, realizing impact

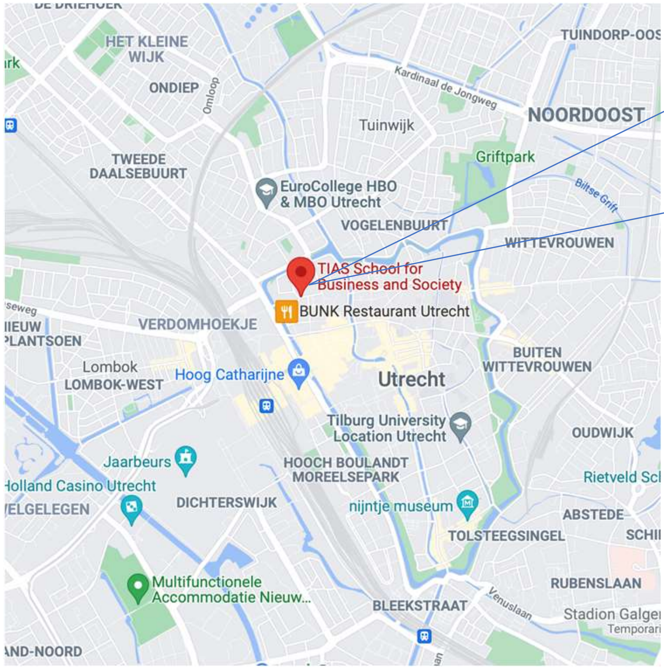
- Triodos Investment Management, Investment Officer
- TIAS School for Business and Society, Senior Lecturer on CSR
- Signify Foundation; Non Executive Board Member
- Working with investors, entrepreneurs to create sustainable models and social impact

About TIAS

- Embedded in strong university
- Top 3 in Economics in Europe
- Top 3 in Business in Europe
- Excellent faculty
- Facilities: lecture theatre/ breakout rooms/ library access/ virtual class
- Network

Location TIAS

- In the centre of Utrecht
- 10-minute walk from Central Station
- Nearby parking garages



Practical information

RBA program

Designed for you?

The RBA program is developed for the investment professional who is motivated to learn and willing to invest in knowledge and skills that are required to change and lead the investment profession.

Ideally you are a mid to senior career professional. Typically, you work as an investment manager, portfolio manager, risk manager, investment administrator, investment advisor, fiduciary manager or client manager in a similar position. Participants could also work in a capacity of trustee, work for a regulatory authority or hold a supervisory position.

Study load & time allocation

Each module will require 10 weeks of 10 to 12 hours of study load including classes*. Class is scheduled once every two weeks in the late afternoon and evening.

This will vary according to your pre-education and work experience. Module 1 will be offered again in September 2022; however, you can start the program with any module when it suits you.

*) If the corona measures don't allow in-class teaching, the entire or part of the program will be offered with live online classes.

Cost of module(s)

Full RBA Program (12 modules)	1.950 euro per module
1 module	2.295 euro
1 module for members*	2.050 euro
2 modules	2.195 euro per module
2 modules for members*	1.950 euro per module

*) Members of CFA Society VBA Netherlands

Registration & admission

When applying for one of the modules or the complete RBA program, a short motivation and resume are required.

Admission will be based upon your pre-education and the level of relevant work experience.

Interested or questions?

A fully detailed brochure is available for the program and per module. If you are interested or if you have any questions, please do not hestitate to contact CFA Society VBA Netherlands

Anne-Marie Munnik (Executive Director)

annemarie.munnik@cfavba.nl

About VBA Academy

The RBA program is part of the VBA Academy and is composed of different modules of executive nature.

The VBA Academy offers different modules and courses to the investment professional. Not only to keep their professional competence up-to-date, but also to help them grow in their careers to the next level of being a trusted partner with effective leadership and a good sense of integrity.

About CFA Society VBA Netherlands

The VBA Academy is powered by CFA Society VBA Netherlands, which is the association for investment professionals in the Netherlands.

It is our mission to contribute to the advancement and stability of the investment community by setting standards, raising ethics, improving competence and sharing knowledge.

All without a profit motive.