



**College for
Financial Planning®**
EDUCATING THE NATION'S TOP FINANCIAL ADVISORS

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**COLLEGE FOR FINANCIAL PLANNING TO LAUNCH
DESIGNATION DEVOTED TO SUSTAINABLE,
RESPONSIBLE AND IMPACT INVESTING**

***Leading financial educator partners with US SIF for program allowing planners to become
Chartered SRI Counselors***

CENTENNIAL, Colo. – May 31, 2018 – The College for Financial Planning (CFFP) will launch the groundbreaking new professional designation, the Chartered SRI Counselor™ (CSRIC™) this fall, in collaboration with the industry-group leader US SIF: The Forum for Sustainable and Responsible Investment.

Creation of the new coursework with a respected partner puts education innovator CFFP at the forefront of one of the most dynamic trends in personal investing. More than 20 percent of assets under professional management in the United States – over \$8.7 trillion – are now involved in sustainable, responsible and impact (SRI) strategies, according to US SIF.

“We’re pleased to launch the Chartered SRI Counselor™ designation as part of our mission to offer the most cutting-edge educational resources and the most respected investment-learning environment in the nation,” said CFFP President Dirk Pantone. “Investors of all kinds are clamoring for more information about sustainable investment and corporate responsibility, and this program will be a trusted resource for planners.”

CFFP leaders said there was only one logical partner in designing and implementing certification in such a fast-growing, complex area of investment planning. “US SIF is universally seen as the most trusted organization when it comes to sustainable and responsible investment,” Pantone said. “Their input and expertise has made them an invaluable partner.”

“US SIF is honored to be part of the creation and rollout of the CSRIC™ designation. As the U.S. organization dedicated to expanding sustainable and impact investing and enhancing the rigor of the field, we believe this designation will help accomplish both of these goals. It provides a blend of foundational knowledge and scenario learning to give advisors the tools to better serve clients interested in sustainable, responsible, and impact investments,” said Lisa Woll, chief executive officer of US SIF. “This program is ideal for financial professionals seeking to expand their knowledge and pertinent skills in environmental, social, and governance (ESG) investing. We have found that this expertise allows advisors to fill the needs of a broader network of clients and strengthen client relationships.”

Coursework for planners seeking the CSRIC™ designation will detail the history of sustainable and impact investing. It will present the range of responsible investing approaches

and share comprehensive information on the environmental, social, and governance factors considered by responsible investors. The course will also explore trends in shareholder engagement, fiduciary duty, and portfolio construction.

Additional information on the CSRIC™ designation launch and interviews with the program's creators are available upon request. More information about CFFP can be found at cffpinfo.com, or by calling 1-800-237-9990.

About the College for Financial Planning

Founded in 1972, the College for Financial Planning provides accessible and flexible degree, non-degree, and continuing professional education programs to students nationwide. Shortly after its founding, the College introduced the CERTIFIED FINANCIAL PLANNER™ certification, which has evolved into the world's most recognized and respected financial planning credential, with more than 65,000 professionals in the U.S. having earned the credential.

In addition to its CFP® Certification Professional Education Program, the College offers two graduate degree programs that provide more in-depth knowledge of the finance industry. Professional designation programs are also available, with specializations ranging from asset management to retirement planning. The College for Financial Planning is accredited by the Higher Learning Commission and is a member of the North Central Association. More than 155,000 students have graduated from the College's programs. For more information, visit cffpinfo.com.

About US SIF: The Forum for Sustainable and Responsible Investment

US SIF is the leading voice advancing sustainable, responsible and impact investing across all asset classes. Its mission is to rapidly shift investment practices toward sustainability, focusing on long-term investment and the generation of positive social and environmental impacts.

US SIF members include investment management and advisory firms, mutual fund companies, asset owners, research firms, financial planners and advisors, broker-dealers, community investing organizations and nonprofit organizations. The US SIF 8th Annual Conference will take place from May 30 - June 1, 2018, in Washington, DC. The biennial Report on US Sustainable, Responsible and Impact Investing Trends will be published later this year.