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Increase in-house nous with our ESG Advice, Knowledge, Support, Know-how & Workshops

We bring extensive, in-depth ESG and regulatory experience gained from 30 years of working in private practice and in-house, both on the legal and business sides of banks and asset managers. Introduction

If you're at this page, you are probably aware that it is not an option to ignore ESG or to greenwash financial products and that doing so can be **financially and reputationally disastrous**.

ESG resource or skill shortage? Problem solved: Get advice; pull in project support; fast-track and expand know-how and get immediate practical ESG knowledge.

Like many funds businesses we come across, perhaps you are finding it hard to find and recruit sufficiently experienced people in the field of ESG.

And you simply cannot place the burden of ESG regulatory compliance on your already hardworking in-house teams, without additional support.

...In response to these challenges, Merlys - headed by ESG regulatory expert Verena Charvet - have devised a series of support options for **under-resourced smaller businesses** as well as for larger firms with **over-stretched teams**.

Problems solved with an eye on your purse-strings

In essence, whatever the need to make your business and people ESG-savvy and supported, Merlys has devised a cost-effective solution.

With an **eye on your purse-strings**, we arm your business with the highest level of specialist expertise and capability required to deliver your products and services efficiently and effectively, **without the need to increase your headcount**.

The solutions we offer fall roughly into 3 categories:

1. Advice, Strategy, Research and Analysis - Consultancy and Legal
2. Hands-on support for projects or challenges - short or long term
3. Training, educating, informing your people via Workshops or 'On Call' advice.

This document addresses the third of these solutions:

Training Workshops

Whether it's a bespoke workshop for your company or you buy a seat at the table of a public event, **our Aim is simple:** to fast-track and expand know-how and provide immediate practical knowledge of the topic area.

Who is this training for?

We offer two *expertise*-focused workshops designed to increase knowledge

1. specifically geared to **in-house legal teams** and
2. for individual **compliance officers, product development teams, product managers** and **portfolio managers** *as well as legal teams*

The benefits and takeaways from this training?

This package of workshops provides a “**soup-to-nuts**” overview that will assist in identifying skill or knowledge gaps in your business.

All workshops are tailored to meet the needs of the participants and will provide general guidelines on how to approach some of the more complex issues.

In addition to invaluable knowledge, guidance and learnings from our experts, participants will be able to

- listen to real life challenges from other participants during Q&A
- share their own experiences and regulatory or ESG product issues
- ask specific questions of the Merlys team for up-to-date solutions.

How are these training workshops delivered?

All workshop sessions are delivered **online** and in a format that works for your firm and people... whether that's

- as a bespoke course for your whole in-house team
- as a public course where your team member/s join a collection of other individuals who represent different organisations.

The sessions are designed as short generic workshops to provide immediate practical knowledge of the topic area. That said, the training can be tailored...

- to the level of knowledge of the proposed attendees
- to provide greater or lesser focus on particular aspects relevant to your business
- to spread the session into several short bursts rather in one session.

View course content:

[Technical Workshop for Legal resources](#)

[Product Workshop for Product & Technical resources](#)

GET STARTED

CALL us about running a course for your firm on +44(0)20 7821 0191

EMAIL charles@merlys.uk to book; get dates for next course or if you have questions/queries.

About Workshop Tutor – Verena Charvet

Before ESG and ‘greenwashing’ were recognised terms, our MD, Verena Charvet, ensured that clients were not creating products that were inadvertently non-compliant. She is used to talking to product developers as well as fund boards and helping them with articulating their product intentions, both as a lawyer in private practice and as in-house legal counsel of large asset management companies.

*Most notably, over the last 7 years, Verena and her team have provided invaluable support leading up to **SFDR and EU Taxonomy regulations** coming into force:*

- ❖ *The Merlys team reviewed products in relation to the **SFDR legislation** and ensured that clients weren’t going to get caught out by the new regulations and find that their funds were identified as greenwashing.*
- ❖ *As a trusted partner, Merlys ensured clients applied the relevant rules to their product, shared best practices for drafting the fund documents and – throughout the product development process – assessed and reviewed to make sure the fund would be compliant.*



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This briefing note is intended to act as general guidance. Merlys is happy to assist with any aspect of the content in this article, as it relates to your business.