



March 2022

## ESG Knowledge & Know-How Technical Workshops for legal resources

### Introduction

**These sessions are aimed at legal staff** and are delivered as a bespoke course for a whole in-house team and as public courses for a collection of individuals who represent different organisations.

*Fast-track and expand  
know-how to get  
immediate practical  
ESG knowledge.*

### Content & Format

All Technical workshops can be tailored to provide a series of helpful and bespoke knowledge-building sessions for the time-poor legal teams in your organisation.

We also offer the opportunity for participants to buy a seat at the table with other individuals from the industry, in order to gain knowledge, share ideas and ask questions of their peers and the Merlys consultants. *(see how to book or find out more at the end of this document)*

### About your Course Tutor:

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.

## Course Content

### Part 1 ESG Regulations – what elements are you required to meet?

#### Aim

We'll help you/your staff understand the basic requirements of

- **Taxonomy Regulations**
- **SFDR/SFD**
- **CBDF/AoV**
- **FCA Handbook Rules**

#### Key topics

- Merlys MD, Verena Charvet, takes a high-level walk-through of relevant current ESG regulations and proposes ways to address how to meet the requirements in the most efficient and effective way.

**Duration:** 40-60 minutes

**Delivered online**

### Part 2: ESG Reporting – what requirements for SFD/SFRD are relevant to you?

#### Aim

This session will assist you/your staff with understanding the reporting requirements of SFD/SFRD and whether they are all relevant to your business.

#### Key topics

- Verena and her team discuss a series of points that will support what actions need to be taken, by whom, and offer you possible solutions if you consider there are potential gaps in your coverage.

**Duration:** 40-60 minutes delivered online.

## Booking and Prices

**Bespoke Courses** for your Team: These are created and priced according to your specific objectives. **Call us to discuss** +44(0)20 7821 0191

**Generic Courses on our Public Workshop:** Book your seat for just £150+VAT per person | Booking a place is easy - email us to find out the next date and well book you in charles@merlys.uk

#### And did you know...

1. We also run **Product Workshops** for Product and Legal resources. Take a look at our Product Workshop [here](#)
2. There are a variety of ESG-focused solutions available in addition to our workshops: To read more: click [here](#) or visit our website [www.merlys.uk](http://www.merlys.uk)

**Act now:**

**Call us** to talk about running a course for your firm on +44(0)20 7821 0191

**Email us** at charles@merlys.uk if you have questions/queries; want to book or to know dates or to for our next public course



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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.*