

● Business Management

Context of change and impact on job tasks

As private banking clients become more interested in investing or sustainability initiatives, Private Banks are expected to take into account clients' sustainability preferences when developing sustainable finance solutions (e.g. sustainable investing and impact investing).

This job role will need to identify potential business opportunities and lead the strategic development of business plans relating to sustainable finance products. The job role holder is also expected to set and track sustainability-related Key Performance Indicators and recommend improvement initiatives to improve the performance of sustainable finance products.

As such, the job role holder would need to have a good understanding of key sustainability concepts and frameworks (e.g. climate change, natural capital and non-financial industry sustainability developments, taxonomy) and their relevance to business and product development. This understanding of sustainable finance solutions ensures that they are able to develop business strategies for the sales and delivery of sustainable finance products.

Overall, this job role holder will see significant changes in tasks, specifically the need to expand their knowledge of key sustainability concepts and be aware of new/updated sustainable finance products that are offered.

Time horizon of impact: Within the next three years

Impact on key job tasks

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Oversee front office performance	<ul style="list-style-type: none"> Formulate, execute and evaluate business plans and sustainability Key Performance Indicators for front office teams in alignment with the organisation's sustainability agenda Identify business opportunities and develop business strategies for the sales of sustainable finance products Gather relevant feedback from front office, lead change, develop and implement new sales initiatives and programs related to sustainability to capture key demographics 	●
Connect business units to support delivery to clients	<ul style="list-style-type: none"> Assist and liaise with key partners on resource management and allocation to deliver timely rollout of sustainability initiatives and projects across the business Work and collaborate with business unit heads to identify improvement opportunities, lead change initiatives and drive the implementation of strategic plans related to sustainability across the organisation 	●
Manage operational issues	<ul style="list-style-type: none"> As an independent party from the business, ensure that compliance issues and client complaints related to sustainability are resolved Drive and implement the development work processes, procedures and controls to ensure compliance with sustainability regulations and standards both internally and externally Track adherence to compliance with sustainability regulations and standards across products, processes and services Assist relevant parties with client sustainability due diligence and onboarding procedures 	●

SF TSCs needed

• Climate Change Management	L3	L4	L5
• Natural Capital Management	L3	L4	L5
• Non-Financial Industry Sustainability Developments	L3	L4	L5
• Sustainable Investment Management	L3	L4	L5
• Taxonomy Application	L3	L4	L5

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Investment Banks are expected to integrate sustainability into their product offerings (e.g. green bonds) to cater to clients' sustainability needs and agenda. As a result, the job role holder will need to include the management of sustainable finance products.

The job role holder would be expected to identify potential business opportunities and lead the strategic development of business plans relating to the sales of sustainable finance products. Additionally, this job role holder is expected to set and track sustainability Key Performance Indicators and recommend improvement initiatives for sustainable finance. As such, the job role holder would need to have a good understanding of key sustainability concepts and frameworks (e.g. climate change, natural capital and non-financial industry sustainability developments, taxonomy) and their relevance to business and product development. This understanding of sustainability solutions ensures that they are able to develop business strategies for the sales and delivery of sustainable finance products.

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• Climate Change Management	L3	L4	L5
• Natural Capital Management	L3	L4	L5
• Non-Financial Industry Sustainability Developments	L3	L4	L5
• Sustainable Lending Instruments Structuring	L3	L4	L5
• Taxonomy Application	L3	L4	L5

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Context of change and impact on job tasks

Asset Management firms will be required to take into account sustainability considerations in their business practices as investors grow more conscious of their sustainability preferences.

The job role holder would need to identify potential business opportunities and lead the strategic development of business plans relating to the sales of sustainable finance products (e.g. sustainability-screened investment funds). The job role holder is also expected to set and track sustainability Key Performance Indicators and recommend improvement initiatives to improve the performance of sustainable finance products. As such, the job role holder would be expected to have a good understanding of key sustainability concepts and frameworks (e.g. climate change, natural capital and non-financial industry sustainability developments, taxonomy) and their relevance to business and product development. This understanding of sustainability solutions ensures that they are able to develop business strategies for the sales and delivery of sustainable finance products.

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