NAPA ESG(k)

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Help America's workers with sustainable investing!

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LEAFHOUSE FINANCIAL

Earn NAPA's ESG(k) Certificate

Retirement plan advisors face a difficult challenge: helping clients manage ERISA fiduciary obligations when evaluating environmental, social, and governance (ESG) investments.

Those investments create unique issues — for employer-sponsored retirement plans — that include:

- Investment policy statement updates.
- The fiduciary risk related to non-economic factors involved in selecting plan investments.
- ESG investments for QDIA.
- Participant education.

But advisors now have a solution: NAPA's Environmental, Social, & Governance 401(k) (ESG(k)) certificate — complimentary through Leafhouse Financial's partnership with NAPA! By earning the ESG(k) certificate, advisors will gain:

- Fluency in ESG principles, strategies, and screens.
- Tools to communicate benefits and risks of ESG investments for retirement plans.
- Insight into concerns and trends that support ESG investing.
- A process for educating plan sponsors and participants.