



## How to obtain IASE certifications:

### ISF® and ISB® Level 1 (Advisory) & Level 2 (Specialist)

IASE awards professional designations in the field of ESG and Sustainability. To learn more about IASE's ESG-specific-qualification, please click [here](#).

#### IASE's Professional Designation Types and Levels

IASE's prestigious professional designations - INTERNATIONAL SUSTAINABLE FINANCE® (ISF®) and/or INTERNATIONAL SUSTAINABLE BUSINESS® (ISB®) - are universally recognised as evidence of the highest standards of knowledge, technical expertise, and professionalism the world over.

Whilst the ISF® designation is suited to ESG and Sustainability practitioners who work in the field of finance (e.g. banking, insurance, micro finance, wealth management, accounting, treasury management), the ISB® designation is specifically suited to ESG and Sustainability practitioners who work in all other non-finance related fields of business.



Each IASE designation recognizes 3 levels of proficiency, thus the levels represent a career progression path for ESG and Sustainability practitioners. Advisory/LEVEL 1 represents the Foundational Level, Specialist/LEVEL 2 represents the Intermediate Level, and Expert/LEVEL 3 represents the most Advanced Level.

This brochure focuses on the Level 1 & 2 certification requirements to obtain IASE's ISF® and ISB® professional designations.





## **IASE's Designations: ISF® and ISB® Advisory Level 1 & Specialist Level 2**

To be awarded either of our coveted professional designations, aspirants must meet a range of Initial plus Ongoing certification requirements.

### **Initial Certification Requirements for ISF® and ISB® Advisory Level 1 & Specialist Level 2**

For Advisory Level 1 certification, aspirants need to be at least 16 years of age.

For Specialist Level 2 certification, aspirant need to be at least 18 years of age.

In addition to the above, aspirants must achieve the IASE's 4E's of initial Certification Requirements, a standard which is benchmarked against international best practice by most professional bodies for the awarding of professional designations.

An aspirant who meets all the 4E-requirements as explained below is deemed to have qualified to be awarded IASE's coveted ISF® and/or ISB® professional designations.

The 4E's stand for Education, Examination, Experience and Ethics.

### **Education**

#### **Advisory Level 1**

To be awarded either of IASE's INTERNATIONAL SUSTAINABLE FINANCE® (ISF®) and INTERNATIONAL SUSTAINABLE BUSINESS® (ISB®) Level 1 designations, the aspirant must have at least a high school/matric/Grade 12/Standard 10 diploma/qualification.

#### **Advisory Level 2**

To be awarded either of IASE's INTERNATIONAL SUSTAINABLE FINANCE® (ISF®) and INTERNATIONAL SUSTAINABLE BUSINESS® (ISB®) Level 1 designations, the aspirant must have at least a 3-year post high school qualification through a tertiary institution, such as university degree.

#### ***Study Material and Training***

Whilst not a requirement, the IASE encourage learners who do not already have an ESG specific qualification to consider taking up an ESG Qualifications Course as this would help ensure a solid grounding before attempting the IASE Professional Competency Examination (PCE/Board Exam).

Aspirants should enquire about the IASE endorsed ESG Qualifications Course/s with their local [IASE Member or affiliate](#).





## Examination

To be awarded either of IASE's coveted ISF® and ISB® professional designations, the aspirant must write and pass IASE's Professional Competency Examination (commonly called PCE or "Board Exam").

General information on the **Advisory Level 1 & Specialist Level 2** ISF® & ISB® Board Exams:

- All IASE Board Examinations are delivered 100% online only.
- Aspirants have the flexibility to take the Board Exam from anywhere in the world.
- Languages available: English, French, German, Italian, Korean, Portuguese, Spanish
- Calls to register and sit the Advisory Level 1 IASE Board Exams typically take place 4 times per year. Advisory Level 1 exam sessions typically take place over a two-day period each quarter, with two exam sessions each day at 09h00CET and 16h00CET respectively.
- Calls to register and sit the Specialist Level 2 IASE Board Exams typically take place 2 times per year. Specialist Level 2 exam sessions typically take place over a two-day period every 6 months, with two exam sessions each day at 09h00CET and 16h00CET respectively.
- Registration dates for each round of IASE Board Exams open approximately 3 weeks prior to each exam sitting, and Registrations can be done through the [IASE website](#).
- Examination fees may be obtained from the [IASE Member](#) licensed to represent IASE in the aspirant's specific geographical area.
- Verifications of identity, qualification criteria, payments etc. will be done through a blend of facial recognition technology and the local IASE Member/affiliate in the aspirant's geographical area prior to being allowed entrance to the Board Exams.
- It is the aspirant's responsibility to ensure that he/she is aware of the date, time and place of his/her examination.
- An aspirant may withdraw from an IASE exam at any stage before starting the exam, by notifying via email their regional [IASE Member](#) or by sending an email to [support@iase-certifications.com](mailto:support@iase-certifications.com)

In such cases the examination fee will be carried forward to a future date, however, the aspirant may be required to submit proof that a withdrawal notification was sent prior to his/her exam start time, otherwise it will be regarded as a no-show thus no exam fee transferable or refundable.

- Arrangements relating to special needs or illness during an exam can be made through contacting the regional [IASE Member](#) body or by sending an email to [support@iase-certifications.com](mailto:support@iase-certifications.com)

See the IASE Examination Terms & Conditions section below for more information.

- Advisory Level 1 Exam format: Closed book; 40 multiple-choice questions (MCQ); 4 options per question, with only one correct answer; 60 minutes allowed to complete all Level 1 Board Exams; Pass mark 60% (24 correct answers, or more).
- Specialist Level 2 Exam format: Closed book; 50 multiple-choice questions (MCQ); 4 options per question, with only one correct answer; 90 minutes allowed to complete all Level 2 Board Exams; Pass mark 60% (30 correct answers, or more).
- Marking of examinations is done electronically prior to being moderated by a Board of Examiners for final approval.





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- Results of the IASE Board Exams are typically released via an online medium within 4 weeks after the examination date.
- Exam results are communicated directly to individual aspirants only. Results will only be communicated to third parties if proof of consent from individual aspirants can be produced by the third parties.
- Within a period of 10 working days after results were issued, aspirants will have the opportunity to request a Remark/Review, or Appeal question/s.  
See the IASE Examination Terms & Conditions section below for more information.

Please continue checking [IASE website](#) and social media platforms ([LinkedIn](#) & [Twitter](#)) closer to the time for specific information regarding exams.

## **Experience**

### **Advisory Level 1**

Aspirants do not need to have any previous professional work experience in the field of ESG and/or Sustainability to qualify to be awarded either of IASE's coveted ISF® and ISB® Advisory Level 1 designations.

### **Specialist Level 2**

Aspirants need to have 2 years previous professional work experience in the field of ESG and/or Sustainability in order to qualify to be awarded either of IASE's coveted ISF® and ISB® Specialist Level 2 designations.

## **Ethics (applicable to all levels of proficiency in ESG & Sustainability)**

Ethics is a cornerstone of being a professional.

IASE's ethics requirements are enshrined in IASE's by-laws, [Code of Ethics](#) and Professional Responsibility and Disciplinary Regulations, as amended from time to time.

To be awarded either of IASE's coveted ISF® and/or ISB® designations, the aspirant must:

- Agree to always abide by all IASE Ethics requirements;
- Never have been convicted of a criminal offence;
- Never have had a final sanction imposed on him/her by a court, regulator, or any other lawful authority for a serious offence;
- Never have been disqualified under any law or expelled by any professional association from practicing a specific profession;
- Never have faced or other similar remedial action/s related to professional conduct or unethical practice/s.

[www.iase-certifications.com](http://www.iase-certifications.com)

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## Ongoing Certification Requirements for ISF® and ISB® Advisory Level 1 & Specialist Level 2

Unlike academic qualifications which only attest to the holder's level of knowledge as at the date when they obtained the qualification, professional designations (such as ISF® and ISB®) are designed to confer assurance that the holder of the designation not only met certain knowledge, competency and ethical standards on a certain date, but it also attests to the fact that they stay current with the evolution of the ESG and the Sustainability profession.

This is quite crucial in ensuring that IASE, as an independent 3rd party, can continue to give assurance to the public and employers that our designation holders are, and continue to be, the most competent, ethical and professional ESG and Sustainability practitioners in the world.

Therefore, to retain the right to continue using any of the ISF® and ISB® designations, holders must commit to the following additional Ongoing Certification Requirements:

### Commitment to Continuous Professional Development (CPD)

ISF® and ISB® Advisory Level 1 designation holders are required to undertake a minimum of 10 hours of additional and ongoing learning per annum.

ISF® and ISB® Specialist Level 2 designation holders are required to undertake a minimum of 15 hours of additional and ongoing learning per annum.

CPD is a lifelong learning process where an ESG and Sustainability practitioner systematically engages in activities that maintain abilities, skills and knowledge required for professional practice.

Designation holders are required to record and be able to submit evidence of their CPD activities for the yearly cycles to their local IASE member certification body for inspection.

IASE continually develops online courses that can help our designation holders to obtain the required training and thus meet their CPD requirement for retaining the designation. However, it is worth noting that there are many other ways of achieving your CPD requirements.

Please contact your local [IASE Member certification body](#) for more information in this regard.







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### **Adherence to Ethical Standards (applicable to all levels of ESG & Sustainability proficiency)**

Our designation holders must declare in writing on an annual basis that they continue to adhere to IASE's by-laws and ethics standards as enshrined in IASE's by-laws, Code of Ethics and Professional Responsibility.

They are also required to report to IASE any ethical transgressions that they may have been implicated in during the year under review.

### **Pay the annual recertification fee (applicable to all levels of ESG & Sustainability proficiency)**

For more information about how any of the above is relevant to your geographical territory, please visit the website of your [local IASE member certification body](#).

[www.iase-certifications.com](http://www.iase-certifications.com)

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## Terms and Conditions: IASE Examinations

### 1. DEFINITIONS

In these Terms and Conditions: IASE Examination, unless the context indicates otherwise:

“**Appeal**” means an appeal lodged by an aspirant against the contents of a question as being technically incorrect, ambiguous or unfair;

“**Complaint**” means a complaint lodged by an aspirant directed at the examination process or procedures;

“**Examination**” means the IASE’s Board Exam which an aspirant strives to successfully complete;

“**IASE**” means the International Association for Sustainable Economy, and its licensed regional Members;

“**Remark/Review**”, means an examination script will be reviewed to ensure the submitted answers have all been correctly recorded, have all been accurately marked, and that the examination result is correctly recorded;

“**Rules**” means the rules (Terms and Conditions: IASE Examination) which regulate the examination, which are set out below.

### 2. EXAMINATION RULES

2.1 IASE retains the right to refuse entry to the IASE examinations without needing to provide reasons for such refusal.

2.2 An aspirant may withdraw from an IASE exam at any stage before starting the exam, by notifying via email their regional [IASE Member](#) or by sending an email to [support@iase-certifications.com](mailto:support@iase-certifications.com)

In such cases the examination fee will be carried forward to a future date, however, the aspirant may be required to submit proof that a withdrawal notification was sent prior to his/her exam start time, otherwise it will be regarded as a no-show, thus no exam fee transferable or refundable.

2.3 Aspirants are obliged to allow themselves to be identified prior to and continuously during the process of writing an examination by means of facial recognition technology through their computer/tablet webcams.

2.4 Examination room setup: IASE uses online Artificial Intelligence technology to remotely oversee examinations regardless where the exam is taken from. Section 6 below outlines the full IT specifications required for aspirants to be able to sit for an IASE examination. Amongst the IT requirements is that the aspirant’s device **must have a webcam enabled**, and that the webcam may not be covered or obscured by any objects.

2.5 In terms of examination room setup, IASE also requires aspirants to position themselves so that there is a mirror behind them reflecting forward. At all times during the examination, the aspirant must ensure that there are no other people present in the examination room.

2.6 It is the aspirant’s responsibility to ensure that s/he is aware of the date, time and place of his/her examination.

2.7 Aspirants are allowed a 10-minute grace period to log in and start each examination. Access to the





exam will be blocked should the aspirant attempt to log in more than 10 minutes after the official start time of the examination.

2.8 If an aspirant starts the examination late, s/he forfeits the time s/he was late and will not be allowed any additional time to complete the examination.

2.9 Should aspirants have any books, paper, cell phones, smart watches or any other electronic means of communication in their possession, such articles should, where relevant, be switched off and placed in a handbag, book bag etc. underneath their chairs. Such items should not be handled by the aspirants during the examination.

2.10 The use of calculators is prohibited for the Advisory Level 1 examinations since they do not contain any questions requiring calculations to be made. The use of calculators is also prohibited for the Specialist Level 2 examinations since they do not contain any questions requiring calculations to be made.

2.11 It remains the aspirant's responsibility to ensure, prior to the commencement of an examination, that none of the aforementioned items are in his/her possession.

2.12 Clothing & headgear: Aspirants are reminded that in order to provide the flexibility to take the exams from anywhere, facial recognition technology is used prior to and during the examinations, thus aspirants should consider this when wearing glasses, head wear that might overhanging faces, and/or other items covering faces.

2.13 During the course of the examination no communication of any nature whatsoever may take place between aspirants and anybody else.

2.14 Aspirants may not act in a dishonest way with regard to any examination assessment. No aspirant may assist or attempt to assist other aspirants or obtain help or attempt to obtain help from another person during an examination.

2.15 Rough work: As per 2.9 above, no pieces of paper is allowed, which includes paper used for rough work.

2.16 Aspirants are not allowed to temporarily leave the examination room for breaks, such as going to the bathroom or taking smoking breaks, during examinations.

2.17 Only in exceptional/emergency circumstances may an aspirant leave the examination venue temporarily and return later to complete the examination. In such instances, prior to releasing the aspirant's exam result, IASE may request a written explanation or declaration from the aspirant as to the reason/s for leaving during the examination.

**2.18 Interruptions in internet connection during the examination:**

2.18.1 Should an aspirant's internet connection be interrupted during an examination, a connection needs to re-establish within 3 minutes (IASE exam system will monitor this);

2.18.2 If an aspirant is unable to log back into the exam session within 3 minutes, the system will automatically close the candidate's exam;

2.18.3 The aspirant will then be allowed to sit a future exam at no charge, but this carryover option can be exercised once only;

2.18.4 An aspirant who experiences an interruption in internet connection, and who manages to reconnect within 3 minutes will not be allowed any additional time to complete the exam;

2.18.5 The IASE Exam system will automatically close the exams of aspirants experiencing multiple (more than once) interruptions in internet connection upon the second connection failure;

2.18.6 Such aspirants with multiple connection failures will be allowed to sit a future exam at no charge, but this carryover option can be exercised once only.

2.19 Aspirants are not allowed to copy, duplicate or record the examination questions.







2.20 In the event that it is impossible to mark an examination, the IASE may contact an aspirant and arrange for the aspirant to re-write such an examination with no examination fee being charged.

2.21 Under no circumstances will aspirants have further access to their question papers and/or answer sheets once they have submitted such.

2.22 All answers must be answered online and submitted.

2.23 Once the aspirant has completed all questions to his/her satisfaction, s/he may Submit the answers for assessment. Alternatively, if the allotted time expires, the examination system automatically closes the examination and submits answers as recorded at that point.

2.24 No extra time will be allowed.

### 3. BREACHING THE RULES

Any breaches of the rules or misconduct during the examination is viewed in a very serious light by the IASE. Where an aspirant is guilty of any misconduct during the examination or any non-compliance with the rules, the Board of Examiners will then decide on disciplinary proceedings. Its decisions shall be final. The decisions may include:

- o Reducing an aspirant's marks.
- o Failing the aspirant.
- o Prohibiting an aspirant from sitting any IASE examination for a stated period.
- o Requiring an aspirant to attend additional or other lectures or courses or undertake additional study and assessment.

### 4. RIGHT OF COMPLAINT/APPEAL/REMARK

4.1 Aspirants have the rights to:

4.1.1 Lodge a Complaint directed at the examination process or procedures.

4.1.2 Lodge Appeals against the contents of an examination question as being technically incorrect, ambiguous or unfair.

4.1.3 Request a Remark/Review of the examination results.

#### 4.2 Appeals

4.2.1 When an aspirant encounters a question/s against which s/he intends to lodge an Appeal, s/he must within two working days after the examination, lodge the Appeal through making contact with the local/regional IASE Member organisation or Candidate Support ([support@iase-certifications.com](mailto:support@iase-certifications.com)), then following the prescribed process.

4.2.2 The aspirant intending to lodge an Appeal will, however, not have access to the examination questions once the examination is over.

4.2.3 The local IASE Member organisation or Candidate Support team will escalate the Appeal to the IASE Academic Committee to consider the merits of the Appeal.

4.2.4 Upon receiving an outcome from the IASE Academic Committee, the outcome of the Appeal will be communicated to the aspirant.

4.2.4.1 If the outcome of the Appeal results in a fundamental change to any examination question/s, then the marks of all affected aspirants will be adjusted accordingly prior to the release of final results.

4.2.4.2 If the outcome of the Appeal does not result in a fundamental change to any examination question/s, then all results will stand as is.





### 4.3 Remark/Review

4.3.1 An aspirant intending to have his/her examination script Remarked must formally lodge a request for the Remark within 10 working days of receipt of their examination result.

4.3.2 The Remark request can be made through making contact with the local/regional IASE Member organisation or Candidate Support ([support@iase-certifications.com](mailto:support@iase-certifications.com)), then following the prescribed process.

4.3.3 The submission must identify elements of the examination on which the Remark is sought, specify the grounds on which the Remark is sought and must contain all information which the aspirant wishes to have considered in the Remark.

## 5. DATA INTEGRITY

5.1 It is the responsibility of each aspirant to ensure all required information is provided accurately during the examination registration process. Information provided during the registration process will be used when uploading information to the IASE database.

5.2 Personal information (names, surnames etc) provided during the registration process will be used to record results to the IASE database, and to issue diplomas where applicable. It is the responsibility of the aspirant that his/her name is spelled correctly and reflects the same information as on their identification documents.

5.3 Changes made to the information originally provided can only be made on the IASE's registration system prior to exam. Once the exam has been taken, no further changes may be made to personal details.

5.4 IASE will keep a repository of the original versions of diplomas issued. Aspirants subsequently requiring a diploma to be re-issued will receive a copy of the original diploma issued. The original copies of certificates can't be amended once issued, so if an aspirant's personal details, such as surname, change then the onus rests on the aspirant to keep supporting documents in relation to certificates showing outdated information.

5.5 IASE will use the information provided during registration as the official e-mail address to communicate any information relating to the examinations the aspirant has registered for. The e-mail address provided on the registration system will also be used to communicate results of examinations to the aspirant.

5.6 It is the responsibility of the aspirant to keep the IASE informed of any changes to his/her contact details.

## 6. IT REQUIREMENTS

### System requirements

An internet connection – broadband wired or wireless (3G or 4G/LTE)

Speakers and a microphone – built-in, USB plug-in, or wireless Bluetooth

A webcam or HD webcam - built-in, USB plug-in, or:

An HD cam or HD camcorder with a video-capture card

### Supported operating systems

macOS X with macOS 10.9 or later





Windows 10\*, Windows 8 or 8.1, Windows 7  
Main Linux Distributions  
iOS and Android devices

**Supported browsers**

Windows: Internet Explorer 11+, Edge 12+, Firefox 27+, Chrome 30+  
macOS: Safari 7+, Firefox 27+, Chrome 30+  
Linux: Firefox 27+, Chrome 30+

**Processor and RAM requirements**

*Processor* Minimum Single-core 1Ghz or higher ; Recommended: Dual-core 2Ghz or higher (Intel i3/i5/i7 or AMD equivalent)  
*RAM* 2 Gb Minimum 4 Gb Recommended

**TERMS & CONDITIONS / INDEMNITY**

1. I, (full names)..... hereby confirm that I have read and understand the aforementioned Terms and Conditions: IASE Examinations and that I am bound by them.
2. I agree and acknowledge that, in writing this examination, the IASE will not be liable for death, injury, loss or damage suffered by me or my dependents through or contributed to by any cause whatsoever including, but not limited to, any negligent act, omission or breach of contract on the part of the IASE, its employees, contractors or independent consultants.
3. I agree and acknowledge that I enter upon and exit the examination premises (inclusive of the parking areas) and use the equipment and facilities entirely at my own risk.
4. I and my estate hereby indemnify the IASE and/or its representatives against any claim by any person arising directly or indirectly from my death, injury, loss or damage allegedly caused or contributed to by an act or omission by the IASE and/or its representatives, its employees, contractors or independent consultants in the course of writing this examination.
5. I authorize the IASE and/or its representatives to send any correspondence intended for me, including the outcome of Examination, Appeal, Complaint, Remark of my Examination script and any other correspondence intended for me to the designated e-mail address provided to the IASE and/or its representatives.
6. I indemnify the IASE and/or its representatives against any claim arising from my personal information being sent to the registered e-mail address provided to the IASE and/or its representatives during the registration process. This indemnity shall apply in favour of the IASE and/or its representatives should that e-mail address be wrong or not updated with my latest details.

.....  
Signature Date

