Advanced Green Finance Instruments and Transaction Structuring Training Course

10 – 14 May 2027
Montreux

AGILE LEADERS
Training Center

AGILE LEADERS
Training Center

Advanced Green Finance Instruments and Transaction Structuring Training Course

Ref: 1139_184133 **Date:** 10 – 14 May 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Advanced Green Finance Instruments and Transaction Structuring Training Course is a one-week course for finance professionals, bankers, risk specialists, treasury teams and project sponsors who leave with a green financing proposal. Participants screen green projects, apply green taxonomies, structure green bonds and loans, integrate climate risk, control use of proceeds and prepare allocation and impact reporting with an external-review evidence pack. Agile Leaders Training Center develops green finance transaction structuring capability.

Who Should Attend

- Teams responsible for sustainable finance products and transaction design
- Corporate finance and treasury staff responsible for funding environmentally aligned projects
- Credit and risk specialists responsible for climate and project-risk assessment
- Investment teams responsible for evaluating green debt instruments
- Project sponsors responsible for eligibility evidence and environmental outcomes

The course assumes participants can interpret financial statements and debt terms, and it leaves out introductory ESG awareness, general sustainability reporting and environmental science.

Departments and Industries

The course supports departments and industries that originate, assess, finance or monitor environmentally aligned projects.

- Corporate finance, treasury, banking and capital-markets teams
- Credit, enterprise risk and sustainability functions
- Energy, utilities and infrastructure organizations
- Real estate, manufacturing and transport organizations
- Investment, development finance and advisory institutions

Learning Objectives

By the end of this course, participants will be able to:

- Evaluate projects against taxonomy and eligibility criteria
- Compare green bonds, loans and sustainability-linked structures
- Build a use-of-proceeds financing framework
- Analyze credit, climate and greenwashing risks
- Apply allocation and impact reporting controls
- Build a review-ready green financing proposal

AGILE LEADERS
Training Center

Course Agenda

Day 1: Taxonomy and Project Eligibility

- Green Finance Instrument Classification Map
- Environmental Objective and Project Category Matrix
- Green Taxonomy Screening Checklist
- Eligibility and Exclusion Criteria Register
- Green Project Pipeline Prioritization Scorecard

Day 2: Green Bonds and Loans

- ICMA Green Bond Principles Component Map
- LMA Green Loan Principles Component Map
- Use-of-Proceeds Transaction Structure
- Sustainability-Linked Instrument Comparison Matrix
- Green Debt Term Sheet Builder

AGILE LEADERS
Training Center

Day 3: Risk, Modeling and Governance

- Physical and Transition Risk Register
- Green Project Credit Assessment Model
- Environmental Outcome Financial Model
- Greenwashing Claim-Control Checklist
- Green Finance Governance and Approval Matrix

Day 4: Proceeds, Reporting and External Review

- Proceeds Tracking and Reconciliation Ledger
- Allocation Reporting Schedule
- Environmental Impact Indicator Catalogue
- Impact Measurement Assumption Register
- External-Review Evidence Pack

Day 5: Green Transaction Structuring Practice

- Exercise: Screen a Renewable-Energy Project
- Exercise: Select a Green Financing Instrument
- Exercise: Structure Proceeds and Risk Controls
- Exercise: Build Allocation and Impact Reports
- Capstone Exercise: Green Financing Proposal

AGILE LEADERS
Training Center

Practical Exercises

The course uses suggested activities to turn project evidence into a financeable and review-ready transaction proposal.

- Suggested activity: screen an infrastructure project against eligibility and exclusion criteria
- Suggested activity: draft a green loan term sheet for an industrial efficiency project
- Suggested activity: build proceeds controls and impact indicators for a transport portfolio
- Suggested activity: assemble external-review evidence for a green bond proposal

FAQs

Who suits advanced green finance transaction structuring training?

Finance professionals, bankers, analysts, risk specialists, treasury teams and project sponsors suit the training. Participants should already interpret financial statements and common debt terms.

How does green finance training differ from general ESG training?

Green finance training centers on eligible projects, debt instruments, transaction terms, proceeds, risk and measurable outcomes. General ESG training addresses wider environmental, social and governance topics across organizational decisions.

What distinguishes green bonds from green loans?

Green bonds raise capital through debt securities, while green loans use lending facilities. Both can use proceeds for eligible green projects and require documented evaluation, proceeds management and reporting processes.

How are green projects screened for financing eligibility?

Green projects are screened against environmental objectives, eligible categories, technical criteria, exclusions, potential adverse effects and evidence requirements. The result is recorded in an eligibility memo with conditions and approval responsibilities.

AGILE LEADERS
Training Center

What belongs in a green financing proposal?

A green financing proposal contains the project pipeline, eligibility evidence, selected instrument, financing terms, risk assessment, governance, proceeds controls, impact indicators, reporting plan and external-review evidence.

Conclusion

Participants take back a green financing proposal containing eligibility evidence, transaction terms, risk controls, proceeds management and reporting plans. The proposal changes an environmental project idea into a structured financing case. It helps teams test integrity, coordinate approvals and maintain traceable allocation and impact evidence.