

FSA Credential Level I Exam Preparation Training Course

2 – 6 August 2027
Montreux

AGILE LEADERS
Training Center

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Ref: 2207_261490 **Date:** 2 – 6 August 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

FSA Credential Level I Exam Preparation Training Course is a one-week foundation course for finance, sustainability, investment, assurance, and consulting professionals, who leave with an FSA Level I Study and Practice Plan. The course connects sustainability accounting foundations, sustainability disclosure standards, financial materiality analysis, industry-based disclosure guidance, and exam-style question practice. It organizes official curriculum themes into traceable study decisions without promising an examination result. Agile Leaders Training Center delivers focused FSA Credential Level I exam preparation.

Who Should Attend

- Teams responsible for sustainability and financial reporting
- Functions responsible for investment research and portfolio analysis
- People responsible for external audit and assurance support
- Teams responsible for corporate strategy and sustainability governance
- Advisory functions connecting sustainability information with financial decisions

The course assumes participants can interpret business reports or financial information; it leaves out advanced valuation modeling and Level II case analysis.

Departments and Industries

The course supports sustainability-information decisions across corporate, financial-services, professional-services, industrial, and consumer sectors.

- Finance, accounting, and corporate-reporting functions
- Sustainability, governance, and enterprise-risk teams
- Investment research, asset-management, and banking functions
- Audit, assurance, consulting, and advisory practices
- Strategy, investor-relations, and business-planning teams

Learning Objectives

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

- Analyze demand for decision-useful sustainability information.
- Compare roles across the sustainability information ecosystem.
- Apply financial materiality to disclosure decisions.
- Use IFRS Sustainability Disclosure Standards concepts and SASB Standards guidance.
- Evaluate cross-industry and industry-specific information.
- Build an evidence-based Level I study and practice plan.

Course Agenda

Day 1: Establish the Disclosure Context

- Sustainability Information Demand and User Map
- Corporate and Investor Decision-Use Case Matrix
- Financial Reporting Boundary Comparison
- Standard-Setter, Regulator, and Data-Provider Ecosystem Map
- Level I Curriculum Domain Baseline Checklist

Day 2: Apply Materiality and Information Quality

- Investor-Focused Financial Materiality Method
- Decision-Useful Information Quality Criteria
- Material Sustainability Risk and Opportunity Register
- Disclosure Evidence and Source Evaluation Grid
- Changing Materiality Scenario Analysis

Day 3: Navigate Sustainability Disclosure Standards

- IFRS Sustainability Disclosure Standards Architecture
- Governance, Strategy, Risk Management, and Metrics Framework
- General Requirements Disclosure Mapping Tool
- Climate-Related Disclosure Concept Map
- Connected Financial and Sustainability Information Review

Day 4: Use Industry-Based Guidance

- SASB Standards Industry Classification Navigation
- Industry-Specific Disclosure Topic Selection Matrix
- Cross-Industry Information Comparison Method
- Metrics Relevance and Evidence Assessment
- Corporate Strategy and Investor Decision Linkage Map

Day 5: Practice Level I Application

- Exercise: Diagnose a Sustainability Information Ecosystem
- Exercise: Apply Financial Materiality to a Business Scenario
- Exercise: Map Disclosure Requirements and Industry Guidance
- Exercise: Analyze Exam-Style Questions and Distractors
- Capstone Exercise: Complete the FSA Level I Study and Practice Plan

Practical Exercises

The course uses suggested activities based on reporting, investment, assurance, and strategy decisions.

- Suggested activity: map information users, providers, standards, and decision needs.
- Suggested activity: classify material sustainability risks, opportunities, evidence, and disclosure implications.
- Suggested activity: compare cross-industry concepts with industry-specific SASB Standards guidance.
- Suggested activity: review question rationales and assemble a prioritized study and practice plan.

FAQs

Who suits FSA Credential Level I exam preparation and what does it assume?

FSA Credential Level I exam preparation suits reporting, investment, assurance, sustainability, and advisory professionals who can interpret business reports or financial information.

How does FSA Level I preparation differ from advanced sustainability analysis training?

FSA Level I preparation emphasizes principles, disclosure context, materiality, standards, and industry guidance, while advanced training typically applies disclosed information to valuation and case-based financial analysis.

What is financial materiality in sustainability accounting?

Financial materiality focuses attention on sustainability-related risks and opportunities that could affect an entity's prospects and inform investor decisions.

How do SASB Standards support FSA Level I study?

SASB Standards support industry-based analysis by organizing disclosure topics and metrics that help candidates examine decision-useful sustainability information in an industry context.

Does FSA Credential Level I exam preparation confer the credential?

No. Course completion does not confer the FSA Credential, and the training provider is not the credential-awarding body.

Conclusion

Participants take back an FSA Level I Study and Practice Plan linking curriculum domains, materiality decisions, disclosure concepts, industry guidance, and question review. It replaces fragmented revision with traceable priorities and evidence checks. The plan supports coordinated preparation across reporting, investment, assurance, sustainability, and advisory responsibilities.