

Executive Summary

The UNEP FI Portal (the Portal) is a self-service platform that allows UNEP FI members to view and manage their institution's profile and engagement information, to manage contacts directly and sign up for activities and programs.

Access and Functionalities

The Portal is accessible through the [UNEP FI Members Area](#) or directly at this link [here](#), allowing members to:

- **View your institution's profile and engagement**
- **View and request to join activities**
- **Manage contacts' information**
- **Manage your communication preferences.**

By accessing these resources through one integrated location, you can streamline your experience, stay organized, and engage more effectively with the resources and opportunities available.

Staff from all UNEP FI members with a valid institutional address can register to use the Portal.

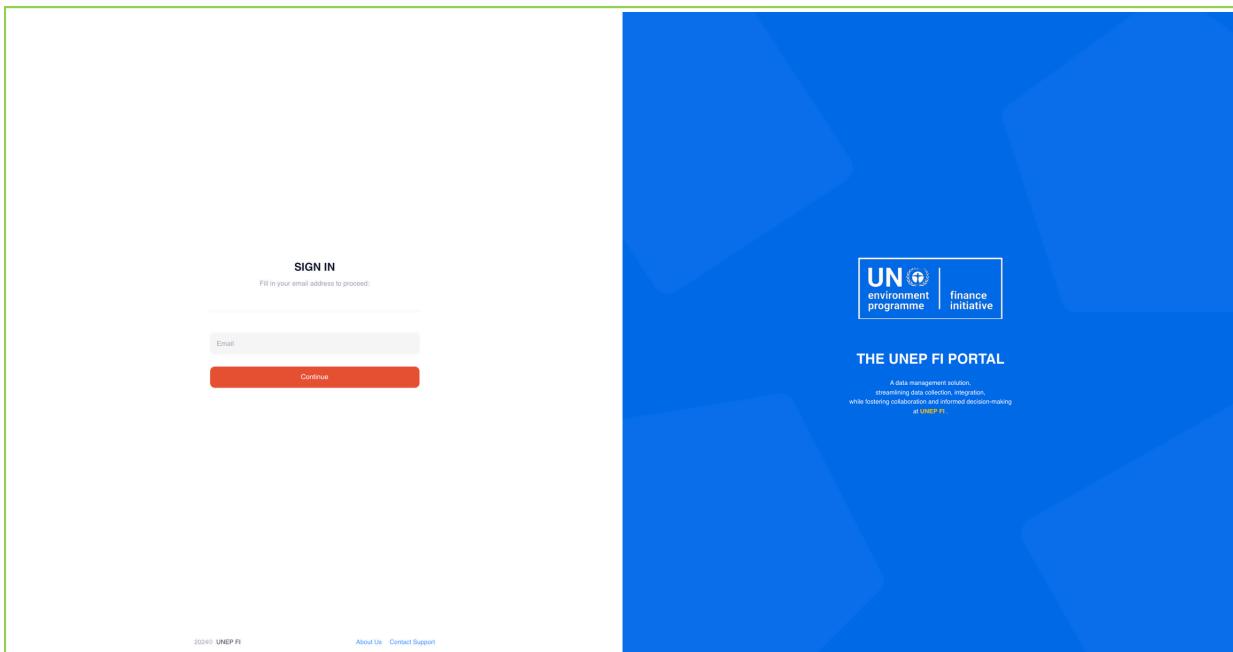
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Getting started: Registration, Activation and First Log in

You can access the UNEP FI Portal through the Members' area of UNEP FI website ([link](#)) or directly at the following link: <https://portal.unepfi.org/>



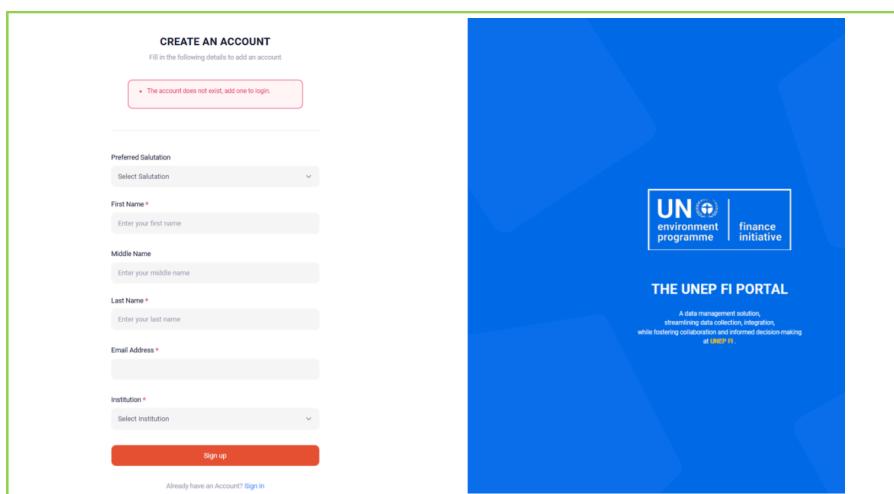
Fill in your institutional email address in the field provided.

If you are an existing user, you will be prompted to fill in your password. If you have not activated your account, you will be prompted to activate it (see under the section [Account Activation and Profile Setup](#)). If you do not have an account, you will be redirected to the registration page.

First registration to the Portal

Step 1

Fill in the required information in the Registration Page – ("*" denote mandatory fields) and Click 'Sign Up':



Step 2

A confirmation screen will appear indicating that your information has been saved successfully. An activation email will be sent to the address you provided to verify that it is valid and active.



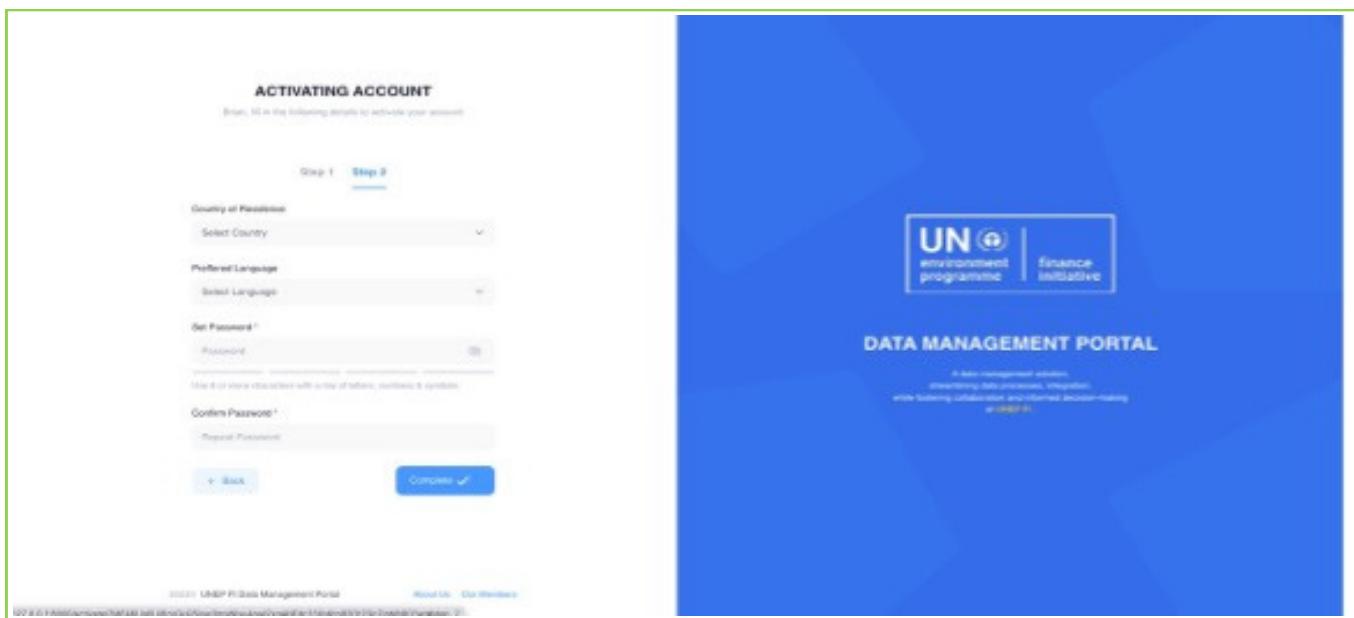
Account Activation and Profile Setup

1. Check your email

- Look for an activation email from “**UNEP FI Portal**” at the address you provided.
- If you don’t see it in your inbox, check your **Junk** or **Spam** folder.

2. Activate your account

- Click the “Activate Account” link in the email - alternatively, copy and paste the URL provided into your browser.
- You will be redirected to the Account Activation Page.



3. Fill in the required information ("*" denote a mandatory field)

4. Click "Continue" to proceed to the next step.

5. Set up and confirm a secure password

Set Password *

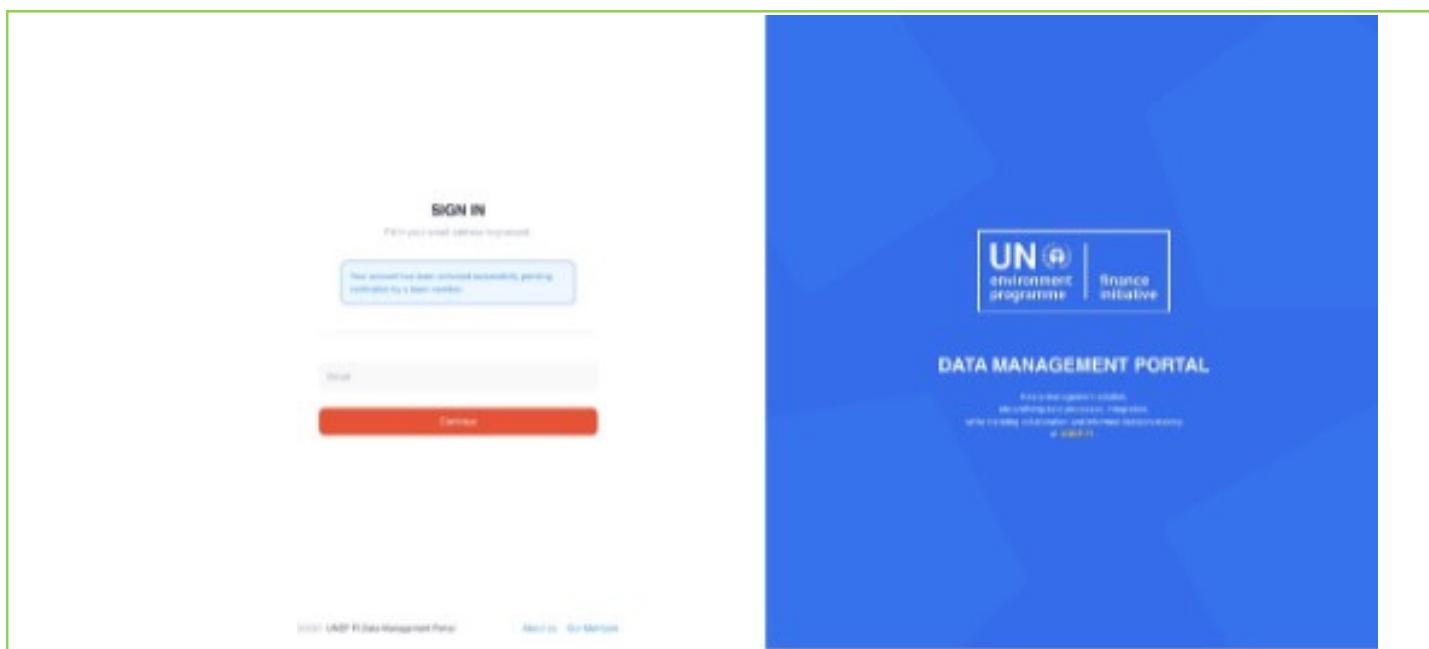
.....|



Use 8 or more characters with a mix of letters, numbers & symbols.

6. Click 'Complete'

You will be informed that your account has been activated successfully, pending verification by a team member - another person from your organization who already has access to the Portal. If you do not know of any - or are the first contact from your institution to use the Portal- contact UNEP FI (signatory@unepfi.org)

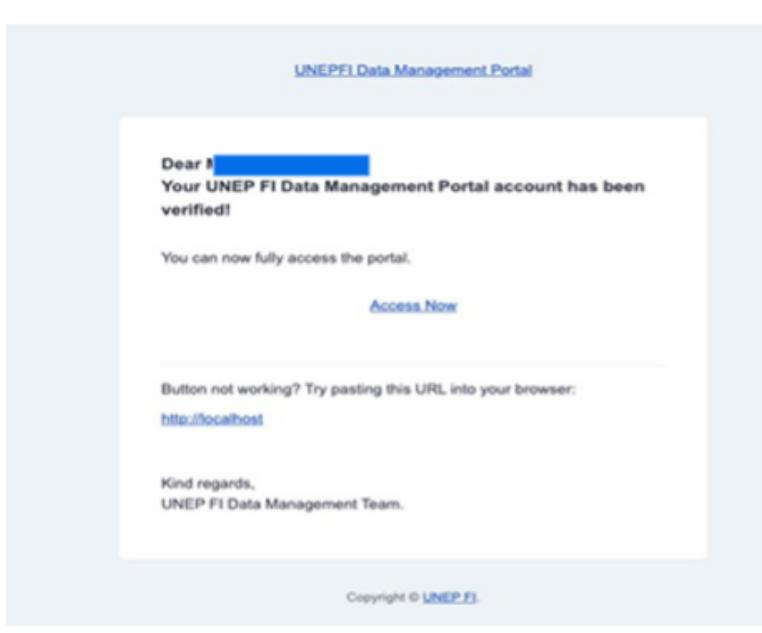


Account Verification

Verification ensures that only users from a specific institution have access to this institution's data.

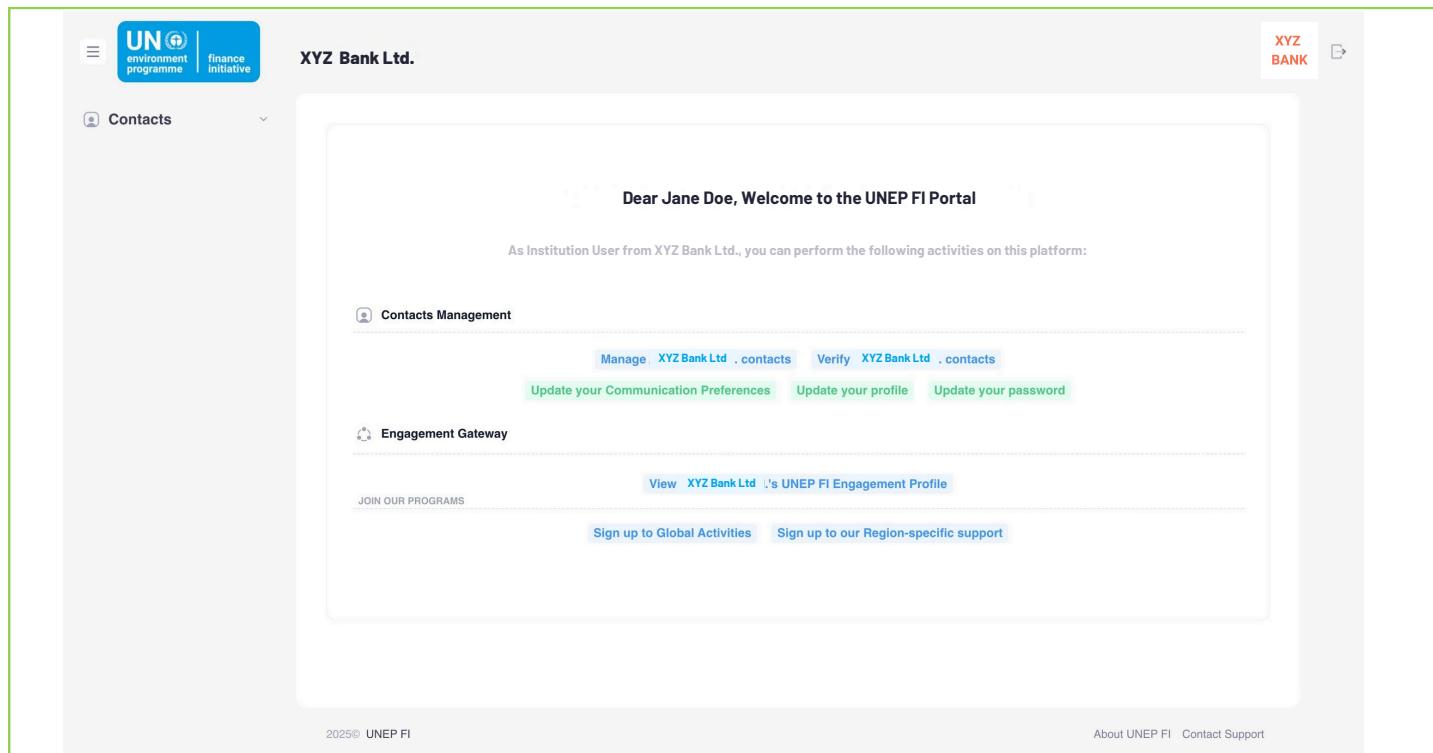
You need to reach out to a member of your institution who already has access to confirm your identity (verification). If you do not know of any, contact UNEP FI (signatory@unepfi.org)

Once verified, you will receive an email from the portal informing you that your account has been verified (Check your 'inbox' then 'Junk' or 'Spam' folders if absent):



You will now be able to login with your email and password and fully access the portal at <https://portal.unepfi.org/>.

Navigating the Home Page



The screenshot shows the UNEP FI Home Page for XYZ Bank Ltd. The top navigation bar includes the UNEP FI logo, the institution name 'XYZ Bank Ltd.', and a 'XYZ BANK' button. A 'Contacts' dropdown menu is open. The main content area is titled 'Dear Jane Doe, Welcome to the UNEP FI Portal' and provides a summary of available activities. It includes sections for 'Contacts Management' (with 'Manage XYZ Bank Ltd. contacts' and 'Verify XYZ Bank Ltd. contacts' buttons, and 'Update your Communication Preferences', 'Update your profile', and 'Update your password' links), 'Engagement Gateway' (with a 'View XYZ Bank Ltd.' link), and 'JOIN OUR PROGRAMS' (with 'Sign up to Global Activities' and 'Sign up to our Region-specific support' links). The bottom of the page features a copyright notice '2025 © UNEP FI' and links for 'About UNEP FI' and 'Contact Support'.

You can always navigate to the home page by clicking the 'UNEP FI' image on the top-left section:

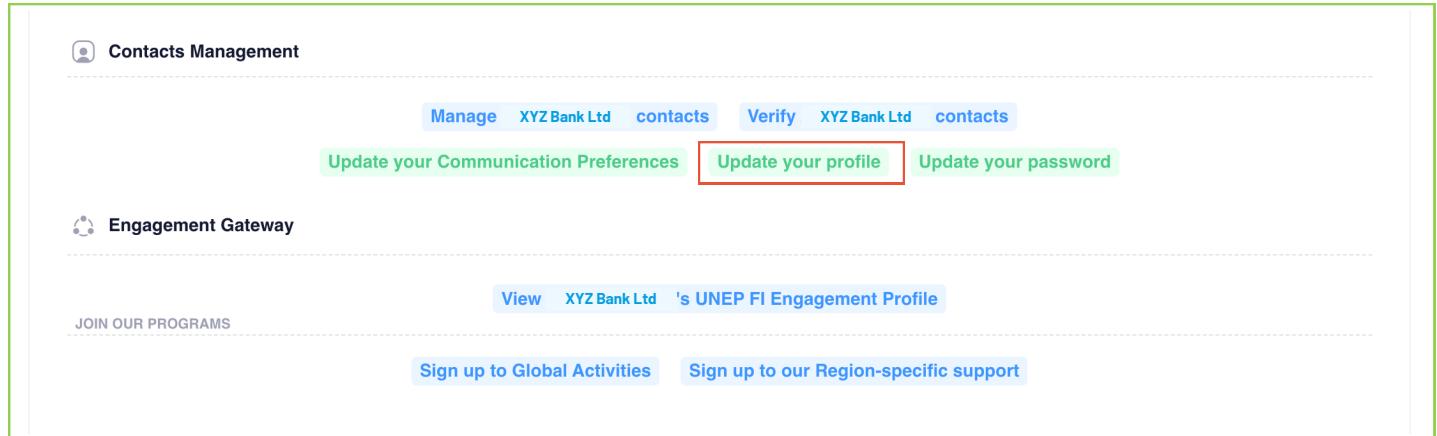


Manage Your Personal Profile

You can update your profile, password and communication preferences any time.

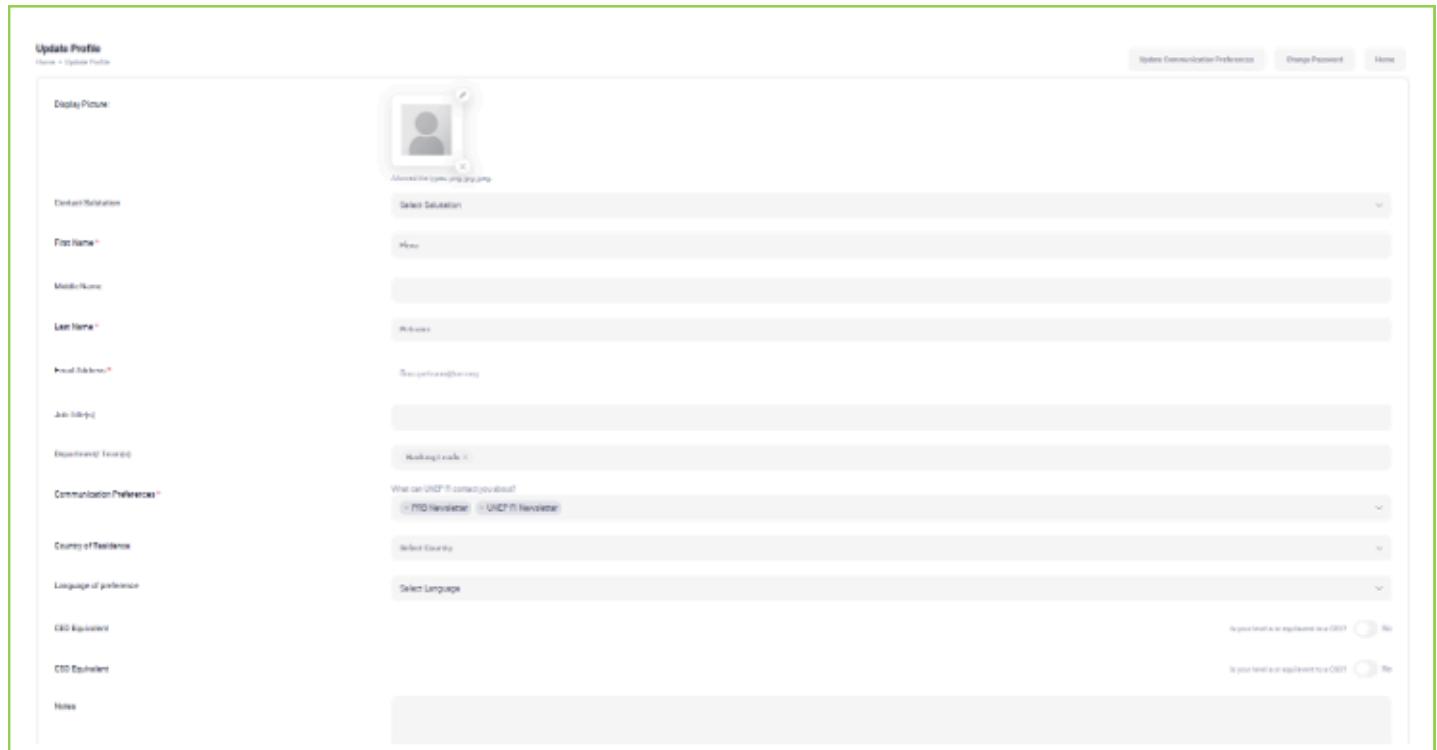
Update Your Profile

From the Home page, select the “Update your profile” Tab



The screenshot shows a user interface for managing personal profiles. At the top, there are tabs for 'Manage' and 'Verify', each followed by 'XYZ Bank Ltd' and 'contacts'. Below these are three buttons: 'Update your Communication Preferences' (green), 'Update your profile' (red box), and 'Update your password' (green). The 'Update your profile' button is highlighted with a red border. Below this, there are sections for 'Contacts Management' and 'Engagement Gateway'. In the 'Engagement Gateway' section, there is a button 'View XYZ Bank Ltd 's UNEP FI Engagement Profile'. At the bottom, there are buttons for 'Sign up to Global Activities' and 'Sign up to our Region-specific support'.

You will be directed to the profile page, where you can modify the desired fields. Information denoted by “*” is mandatory



The screenshot shows the 'Update Profile' page. It includes fields for 'Display Picture' (with a placeholder image and a file upload button), 'Current Institution' (with a 'Select Institution' dropdown), 'First Name*' (with a placeholder 'Hans'), 'Middle Name', 'Last Name*' (with a placeholder 'Wolff'), 'Email Address*' (with a placeholder 'Hans.wolff@unepfi.org'), 'Job Title', 'Department/Team', 'Communication Preferences' (with a dropdown showing 'What can UNEP FI contact you about?' and options for 'FIIO Newsletter' and 'UNEP FI Newsletter', with 'FIIO Newsletter' selected), 'Country of Residence' (with a 'Select Country' dropdown), 'Language of preference' (with a 'Select Language' dropdown), 'CEO Equivalent' (with a checkbox 'Is your firm an equivalent to a CEO?' set to 'No'), and 'COO Equivalent' (with a checkbox 'Is your firm an equivalent to a COO?' set to 'No'). At the bottom right is a 'Save' button.

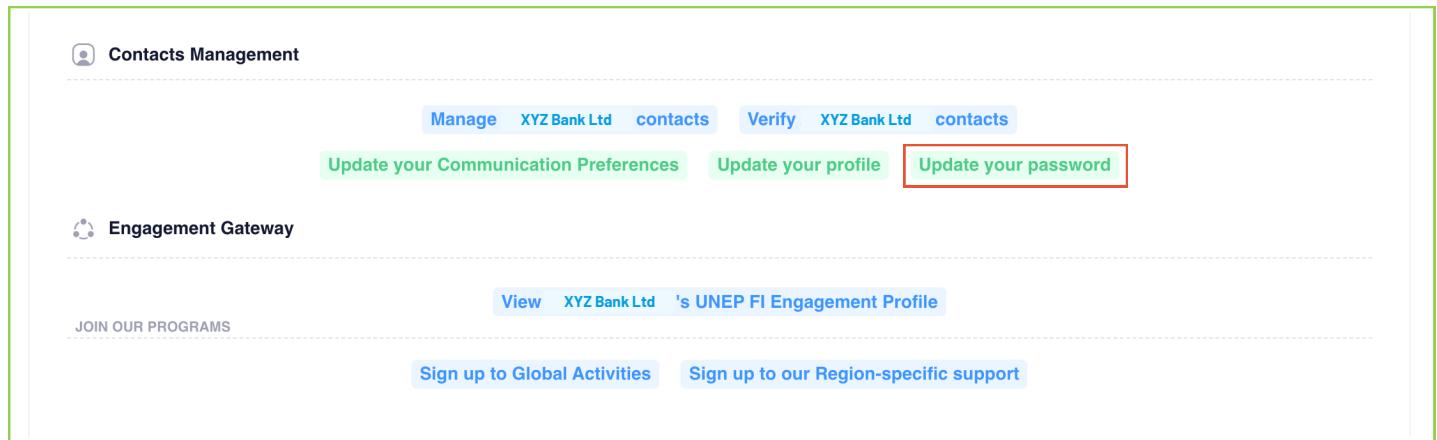
When finished, click 'Save' :

Save

Change Your Password

You can change your password any time, either by navigating from the home page or from the Profile page.

From the Homepage



The screenshot shows the homepage of a website for 'XYZ Bank Ltd'. At the top, there is a navigation bar with 'Manage' and 'Verify' sections. Below the navigation bar, there are three buttons: 'Update your Communication Preferences', 'Update your profile', and 'Update your password'. The 'Update your password' button is highlighted with a red box. The page also features sections for 'Contacts Management' (with a 'Manage' button), 'Engagement Gateway' (with a 'View' button), and 'JOIN OUR PROGRAMS' (with 'Sign up to Global Activities' and 'Sign up to our Region-specific support' buttons).

From the Profile Page

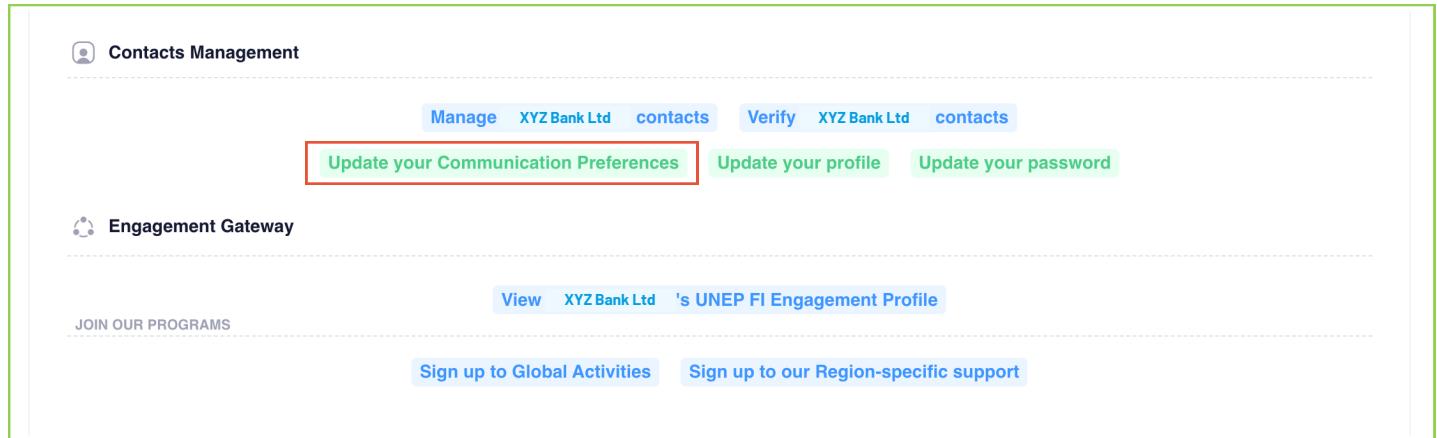


The screenshot shows the 'Update Profile' page. At the top, there is a navigation bar with 'Update Communication Preferences', 'Change Password', and 'Home'. Below the navigation bar, there are several input fields for updating the profile: 'Display Picture' (with a placeholder image and a 'Select file' button), 'Contact Information' (with 'Salutation' dropdown), 'First Name' (with 'Alice'), 'Middle Name' (empty), 'Last Name' (with 'Wick'), 'Email Address' (with 'alice.wick@example.com'), and 'Job Title' (empty). The 'Change Password' button in the top right corner is highlighted with a red box.

Update Your Role and Communication Preferences

By default, all contacts will receive regular updates from UNEP FI, thus you would need to opt-out in case you do not want to receive a particular communication.

Click 'Update Communication Preferences' from the Homepage:



You can modify this field in order to get relevant updates.

Primary focal points should sign up for **all communications and updates**

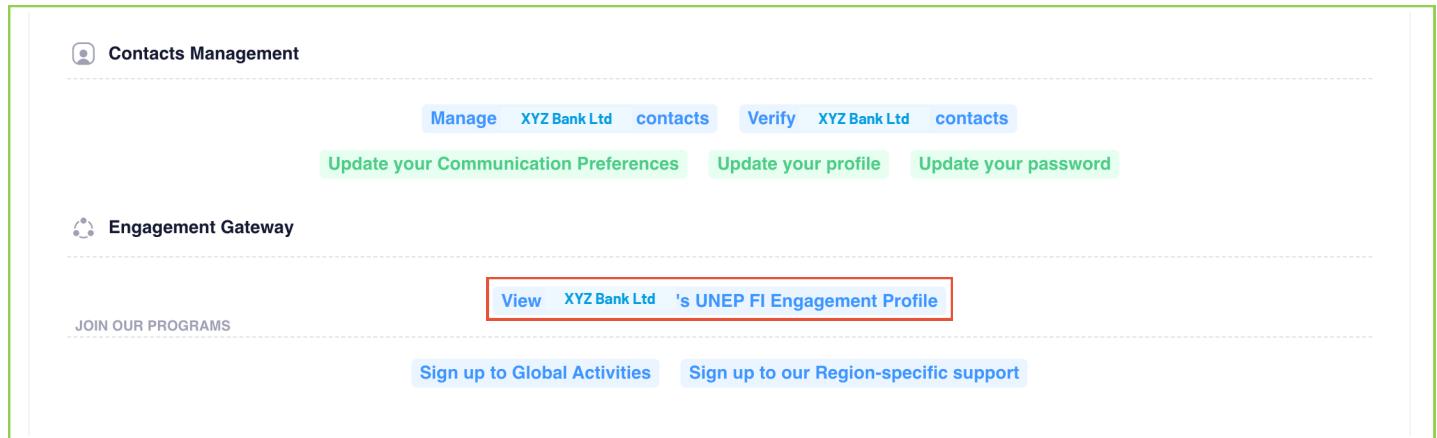


Examples of communication items include:

- Main newsletter and updates
 - UNEP FI Regional Newsletter
 - In English & Spanish
 - Updates covering activities across UNEP FI industries and theatics
- Monthly PRB Update
 - Industry update – banking news for PRB signatories
 - PRB implementation focused
- Other ad hoc communication, linked to your role, covering items like invoicing, reporting, etc..

View your institution's engagement profile

The Portal provides you with real-time access to information about your institution's UNEP FI membership and the activities it has engaged in. From the home page, click "[View Membership Profile](#)" under the Engagement Gateway section



Contacts Management

Engagement Gateway

JOIN OUR PROGRAMS

Manage XYZ Bank Ltd contacts Verify XYZ Bank Ltd contacts

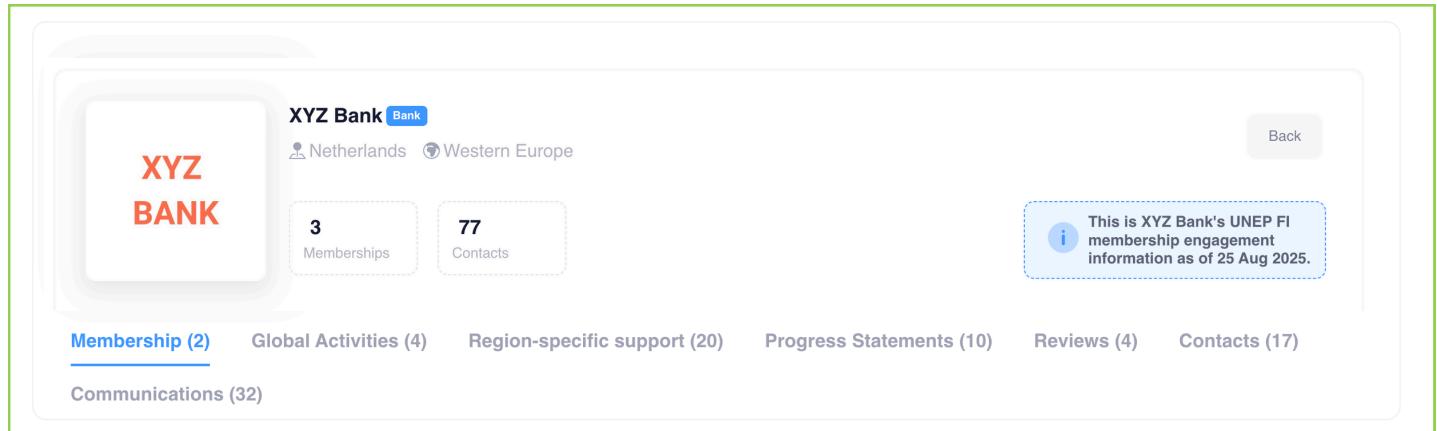
Update your Communication Preferences Update your profile Update your password

View XYZ Bank Ltd's UNEP FI Engagement Profile

Sign up to Global Activities Sign up to our Region-specific support

Your Membership Profile is organized into seven main sections, accessible through the navigation header: Membership, Global Activities, Region-specific support, Progress Statements, Review and feedback process, Contacts and Communications.

General details for your institution are displayed on every page of your profile, including the trading name, institution type, country, region, number of membership affiliations and number of contacts.



XYZ BANK

XYZ Bank Bank

📍 Netherlands 🌎 Western Europe

Back

3 Memberships 77 Contacts

i This is XYZ Bank's UNEP FI membership engagement information as of 25 Aug 2025.

[Membership \(2\)](#) [Global Activities \(4\)](#) [Region-specific support \(20\)](#) [Progress Statements \(10\)](#) [Reviews \(4\)](#) [Contacts \(17\)](#)

[Communications \(32\)](#)

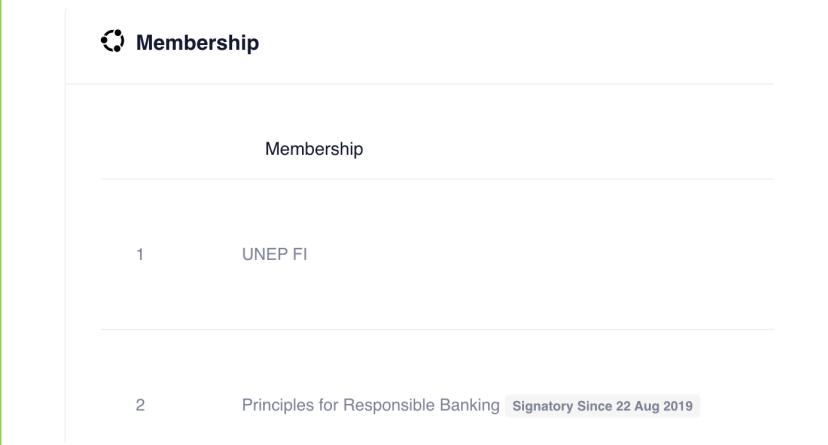
Here are the contents of the different sections:

Membership

Here you will see your Membership status and frameworks your organization is signed up to.

Direct link:

<https://portal.unepfi.org/fi-profile/membership>

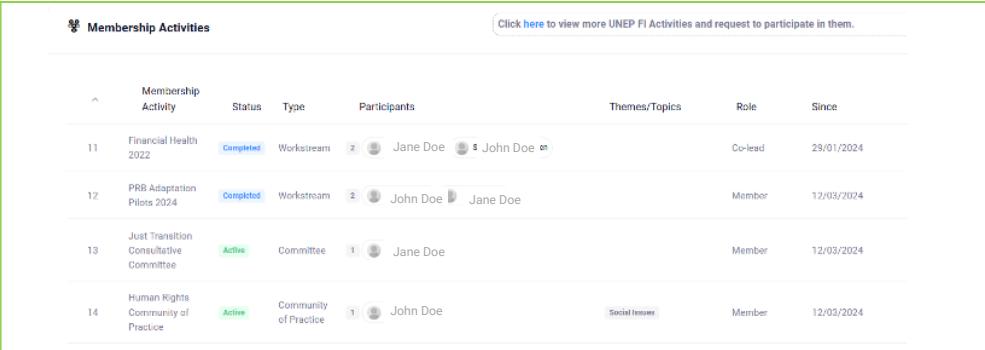


The screenshot shows a list of memberships. Item 1 is '1 UNEP FI'. Item 2 is '2 Principles for Responsible Banking' with a note 'Signatory Since 22 Aug 2019'.

Global Activities

This section includes current and past participation of your institution in UNEP FI workstreams, communities of practice, and pilots, organized at global level. Details include name of the activity, type, participants from your institution, themes and topics covered, each participant's role in the activity, and the date of joining. A link will be available from this page through which you can request to participate in other activities.

Direct link: <https://portal.unepfi.org/fi-profile/activities>



Activity	Status	Type	Participants	Themes/Topics	Role	Since
Financial Health 2022	Completed	Workstream	2 John Doe		Co-lead	29/01/2024
PRB Adaptation Pilots 2024	Completed	Workstream	2 John Doe		Member	12/03/2024
Just Transition Consultative Committee	Active	Committee	1 Jane Doe		Member	12/03/2024
Human Rights Community of Practice	Active	Community of Practice	1 John Doe	Social issues	Member	12/03/2024

Region specific support

This includes information on participation in regional workshops and members' only webinars. You can see the name of colleagues who attended sessions, the dates, and the type of topics covered. A link to the UNEP FI Members area where you can consult forthcoming workshops and register (password protected), is also provided.

Direct link: <https://portal.unepfi.org/fi-profile/events>

Implementation Support					
	Name	Date	Type	Participants	Themes/Topics
1	PRB Implementation Support for APAC: Transition Finance Sectoral Series: How to Decarbonise Steel Industry	14/10/2025	Regional Implementation/CB Workshop	5 Total, 0 on Portal	
2	Clients & Customers Worktrack - Info session	02/10/2025	Members (private) webinars - global	2 Total, 1 on Portal	
3	PRB Implementation support for Europe on Energy Efficiency: Deep-Dive on Client Engagement	29/09/2025	Regional Implementation/CB Workshop	2 Total, 2 on Portal	Pollution and Circular Economy
4	Financial Inclusion: Capturing Realities: Data collection for impact	25/09/2025	Members (private) webinars - global	2 Total, 2 on Portal	Financial Health and Inclusion
5	ESRS Simplification: Considerations for Financial Institutions	04/09/2025	Members (private) webinars - global	1 Total, 0 on Portal	Financial Health and Inclusion
6	Integrating Climate-Related Risks into Financial Regulation in APAC	08/07/2025	Regional Implementation/CB Workshop	2 Total, 0 on Portal	Climate

Progress statements

In this section you will be able to see when your organization has submitted its previous annual progress statements and when the next ones are expected.

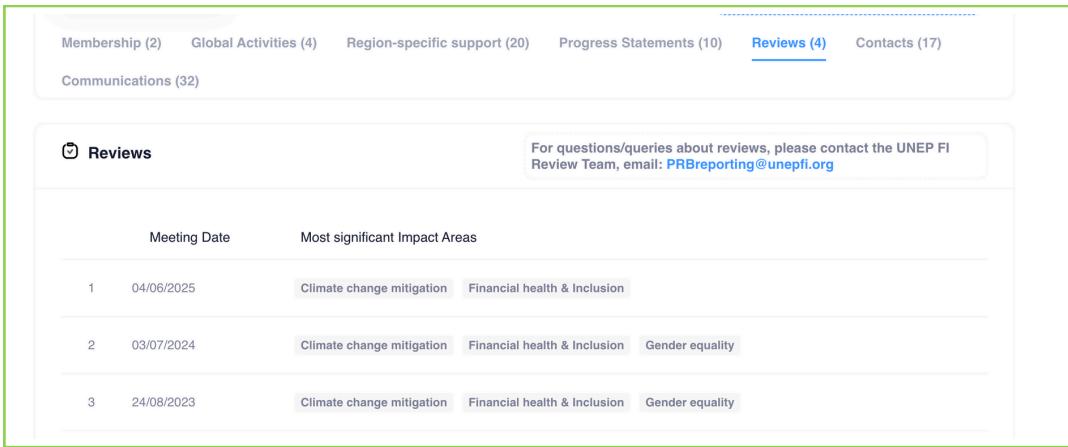
Direct link: <https://portal.unepfi.org/fi-profile/events>

XYZ Bank						
XYZ BANK		Netherlands Western Europe		Back		
3	Memberships	77	Contacts	This is XYZ Bank's UNEP FI membership engagement information as of 25 Aug 2025.		
Membership (2)	Global Activities (4)	Region-specific support (20)	Progress Statements (10)	Reviews (4)	Contacts (17)	
Communications (32)						
Progress Statements						
#	Report	Extensions	Expected Date	Submission Date	Publication Date	Status
1	PRB Report 1	0	02/03/2021	N/A	12/03/2021	submitted
2	PRB Report 2	0	12/03/2022	N/A	01/06/2022	submitted
3	PRB Report 3	0	30/04/2023	N/A	10/05/2023	submitted
4	PRB Report 4	0	11/03/2024	17/05/2024	28/03/2024	submitted
5	PRB Report 5	0	11/03/2025	02/05/2025	28/03/2025	submitted

Reviews

This section includes information on the number of Review and Feedback meetings that your institutions had, the participants from your institution, the relevant impact areas your institution has identified, and information on the forthcoming meetings. You will also find the contact for the UNEP FI Review Team (PRBreporting@unepfi.org)

Direct link: <https://portal.unepfi.org/fi-profile/reviews>

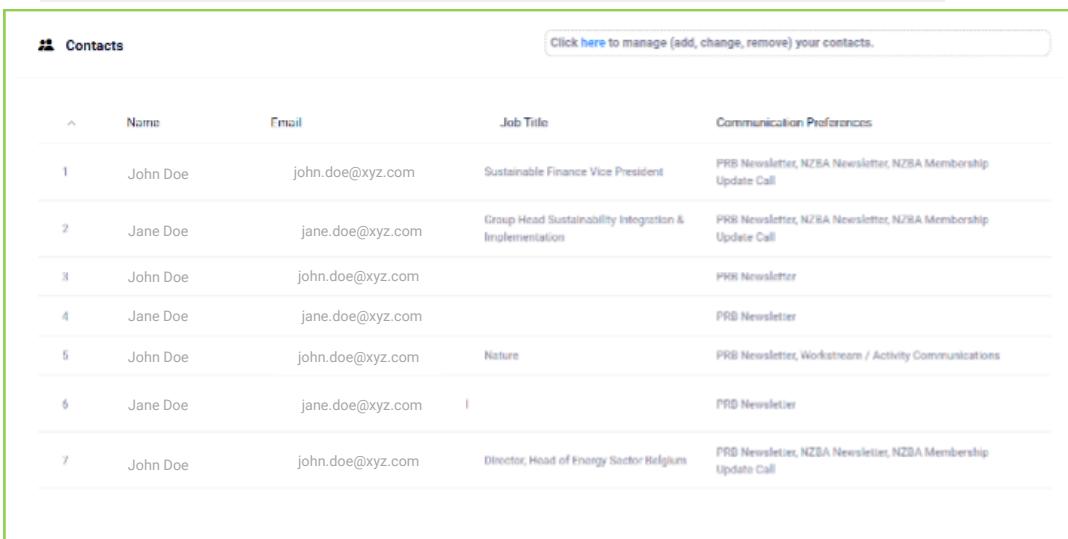


	Meeting Date	Most significant Impact Areas	
1	04/06/2025	Climate change mitigation	Financial health & Inclusion
2	03/07/2024	Climate change mitigation	Financial health & Inclusion
3	24/08/2023	Climate change mitigation	Financial health & Inclusion

Contacts

View your institution contacts, including names, job titles, communication preferences and a link to directly access the contact management page (more information on the 'Manage Contacts' section).

Direct link: <https://portal.unepfi.org/fi-profile/contacts>



	Name	Email	Job Title	Communication Preferences
1	John Doe	john.doe@xyz.com	Sustainable Finance Vice President	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call
2	Jane Doe	jane.doe@xyz.com	Group Head Sustainability Integration & Implementation	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call
3	John Doe	john.doe@xyz.com		PRB Newsletter
4	Jane Doe	jane.doe@xyz.com		PRB Newsletter
5	John Doe	john.doe@xyz.com	Nature	PRB Newsletter, Workstreams / Activity Communications
6	Jane Doe	jane.doe@xyz.com	I	PRB Newsletter
7	John Doe	john.doe@xyz.com	Director, Head of Energy Sector Belgium	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call

Communications

View official email communications that have been sent from UNEP FI to your institution, including title, date and contacts engaged.

Direct link: <https://portal.unepfi.org/fi-profile/campaigns>

	Name	Date	Contacts Engaged
1	PMB update October 2025	21/10/2025	 Jane Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe
2	Member Newsletter September	30/09/2025	 Jane Doe  Jane Doe  Jane Doe  Jane Doe
3	PRB update September 2025	22/09/2025	 Jane Doe  Jane Doe  Jane Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe  John Doe John Doe <img alt="Profile icon" data-bbox="160

Sign up to our Global and Regional Activities

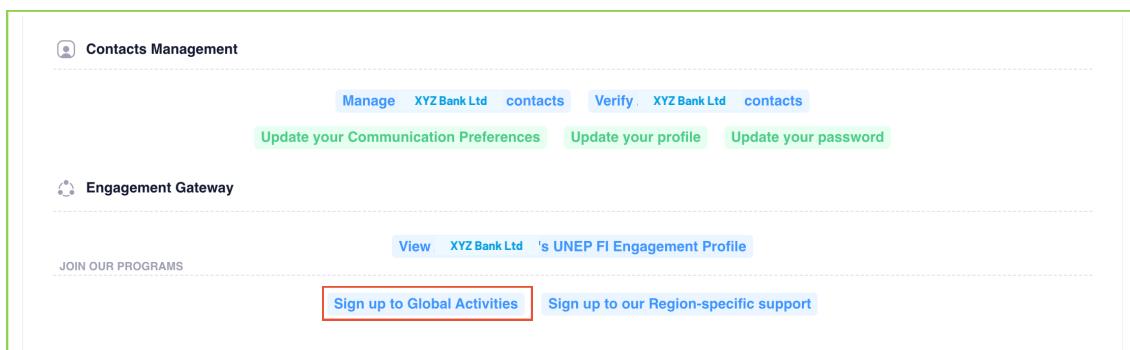
UNEP FI offers a comprehensive range of activities throughout the year, to support your institution's responsible banking journey. You can register for region-specific workshops to access technical capacity building and implementation support, or actively participate in global activities such as workstreams, pilots and communities of practice for peer learning and sharing opportunities, and to co-create with peers and experts.

Sign up to Global Activities

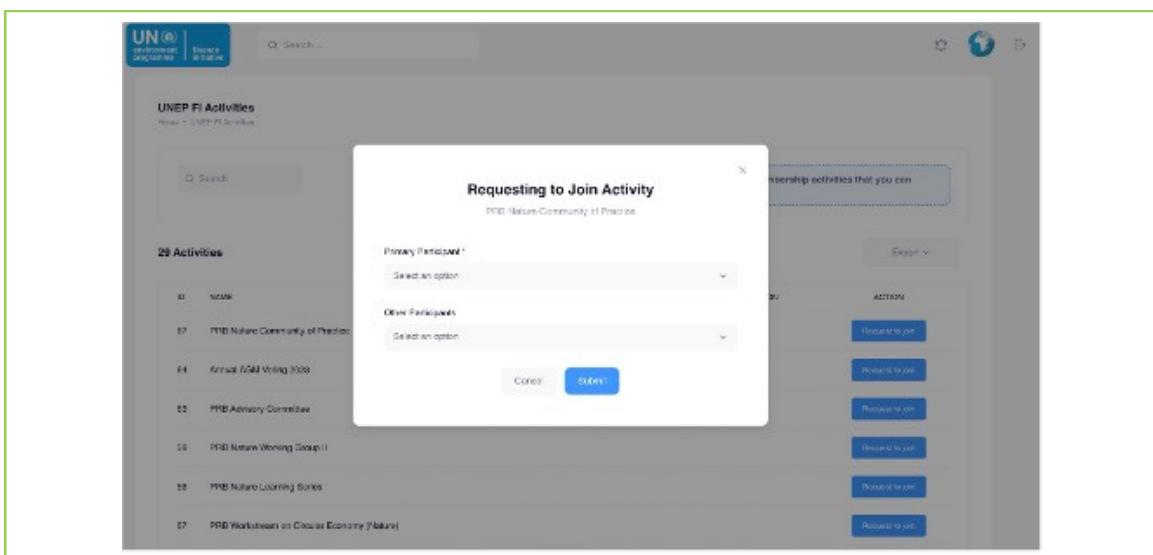
UNEP FI facilitates several activities at global level, including workstreams, communities of practice, and pilots. These activities are presented through the annual Workplan, published on the [UNEP FI Members' Area](#).

Member institutions can indicate their interest in joining activities through the Portal, as follows:

1. Once logged in, from the Home Page click on "Sign up to Global Activities". This page enables you to request to join activities of interest.



2. Select contacts from your institution who want to participate in the activity, starting with the Primary Participant. Click the "Submit" button to complete the request



Your action will generate a request. You will receive an email once your request is approved.

You will be contacted by the relevant UNEP FI colleague with information about your enrollment.

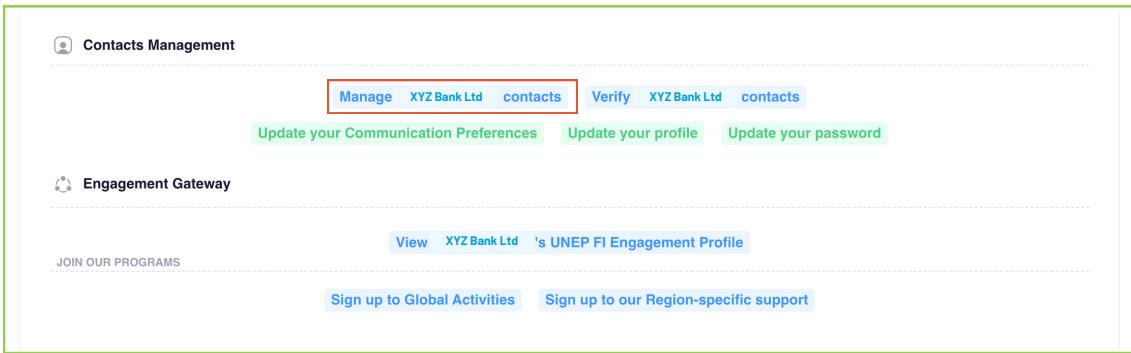
Sign up to our Region-specific support

These Region-specific opportunities cover a range of topics including impact analysis, climate mitigation and adaptation, nature, healthy and inclusive economies, human rights and regulation. Explore upcoming workshops and resources by topic and register directly from the [Members' area](#) (password protected, reach out to your regional contacts or the Secretariat at signatory@unepfi.org if you do not have it).

Impact Analysis Understand and implement the impact analysis process →	Climate Change Climate mitigation & adaptation and just transition activities →	Nature & Biodiversity Integrate nature into business strategy and set targets →
Healthy & Inclusive Economies Financial health & inclusion, gender equality and decent work →	Human Rights →	Pollution & Circular Economy Energy efficiency, resource efficiency, and circular economy →
Client Engagement →	Regulatory Implementation Support programme on CSRD implementation for signatories →	PRB Academy Find the latest courses of the training programme for banks →

Manage Contacts

Through the Portal, you can manage all your institutions' contacts. From the 'Home' page click the 'Manage Contacts' button



You will be redirected to the 'Contacts' page.

From this page you will be able to 1.Add, 2.Edit, 3.Delete 4. Verify Contacts

The screenshot shows the 'All Contacts' page. At the top right, there is a '1' inside a circle and a 'Add New Contact' button. Below the header, there is a search bar and a message box stating: 'These are all the contacts that UNEP FI has from your organization. Please keep them up to date for efficient communication.' The main table has 176 contacts. The columns are: ACTION, NAME, EMAIL, JOB TITLE, DEPARTMENTS, COMMUNICATION PREFERENCES, CONTACT STATUS, and USED FI PORTAL. A contact row is highlighted with a large black rectangle. Numbered callouts point to specific actions: '1' points to the 'Add New Contact' button, '2' points to the 'Edit' and 'Delete' buttons in the ACTION column, '3' points to the 'Verify Contact' button in the ACTION column, and '4' points to the contact name in the NAME column.

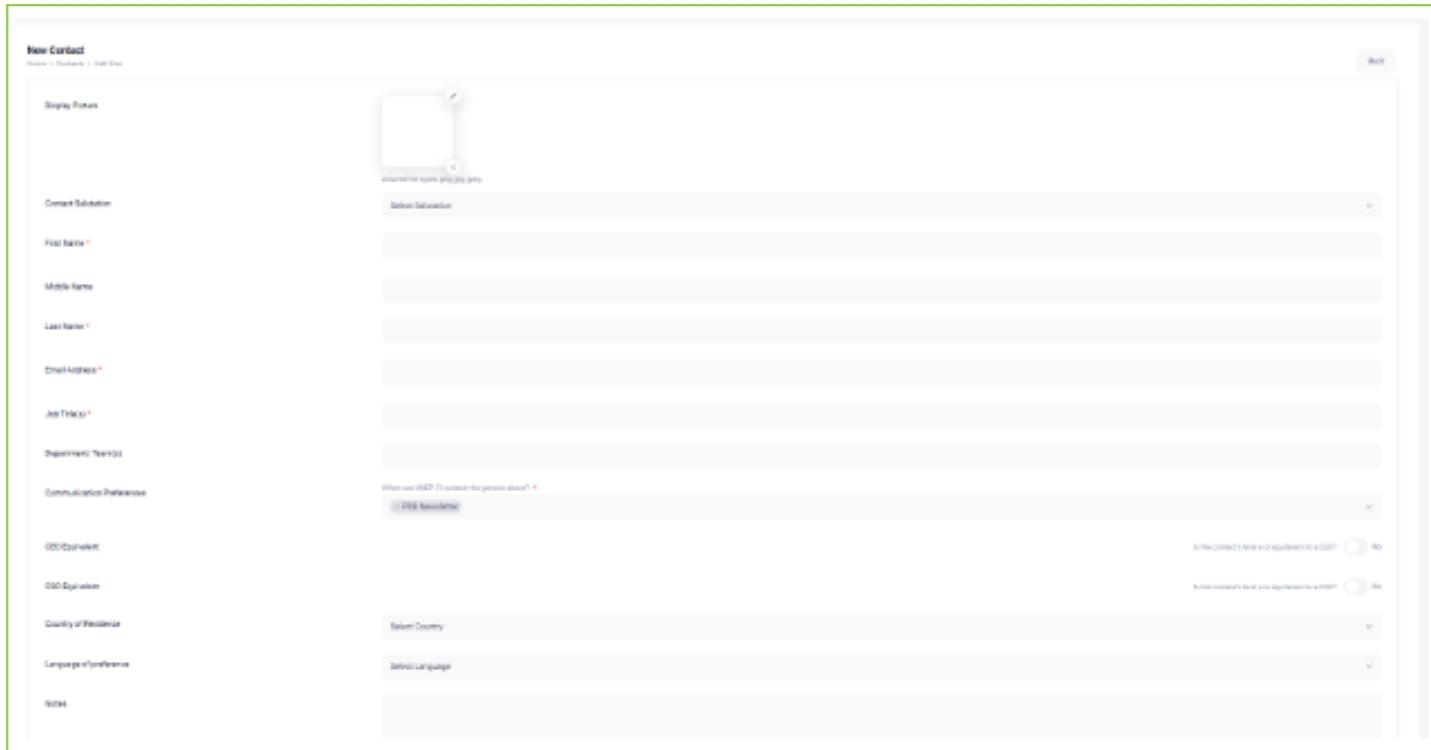
ACTION	NAME	EMAIL	JOB TITLE	DEPARTMENTS	COMMUNICATION PREFERENCES	CONTACT STATUS	USED FI PORTAL
<button>2 Edit</button> <button>2 Delete</button> <button>3 Verify Contact</button> <button>3 Edit</button> <button>3 Delete</button>	4 Sustainability Coordinator				UNEP FI Newsletter		Yes
							No

Add a New Contact

From the All-contacts page:

1. Click the 'Add new contact' button

2. Fill in the required information ("*" denote a mandatory field)



The screenshot shows the 'New Contact' form. It includes fields for displaying a picture, contact information (First Name, Middle Name, Last Name), communication preferences (Job Title, Department, PRB Newsletter, PRB Email, PRB Copy), and contact details (Country, Language). There are also 'Notes' and 'PRB' checkboxes at the bottom.

In the **Communication Preferences** field, you can identify the contacts in charge of different responsibilities within your institution vis-à-vis UNEP FI, to ensure that relevant communication and contact points happen with the relevant individual(s) from member institutions. Institutions must make sure they identify:

- **"All(Main Contact)":** their main central point of contact for PRB related matters, copied in most PRB communications, including important governance related issues (voting etc.), reporting, review meetings, etc., This contact is also responsible for keeping the member institution's contact list updated in the Portal (e.g., by adding or removing relevant colleagues). **Members can indicate more than one main contact.**
- **PRB Individual Review and Feedback process:** the focal point to be contacted regarding PRB annual reports and review meetings.
- **PRB Communications Focal Point:** will receive information about PRB communication campaigns etc. and the UNEP FI communications lead **will** liaise with them for specific purposes related to communication.
- **Invoicing and Finance:** the main focal point that would be contacted for membership fee payment and other invoicing enquiries.

Communication Preferences

CEO Equivalent

CSO Equivalent

Country of Residence

Language of preference

Notes

What can UNEP FI contact the person about? *

PRB Newsletter

Learning and Development

Invoicing and Finance

All(Main Contact)

All(Secondary Contact)

Workstream / Activity Communications

PSI Newsletter

Please note that you must select all communications preferences you wish to receive, e.g., the Main contact wishing to receive the PRB Update must also select the “PRB Update” in the Communication Preferences list.

In addition to selecting the appropriate Communication Preferences, indicate if the contact is:

- The 'CEO' or equivalent
- A 'CSO' or equivalent

3. Give/ modify permissions:

During contact registration, you will also be able to customize your contacts' permissions, e.g., who can modify your institution's details or contacts, who can view or submit your institution's PRB reports.

Modify Permissions

Main Focal Point

Can view institution details?

Can edit institution details?

Can view institution contacts?

Can edit and verify institution contacts?

Can delete institution contacts?

Can view institution reports ?

Can submit institution reports ?

Can delete institution reports ?

Has full control on the institution's contacts and details? No Yes

Discard Save

4. Click the 'Save' button.

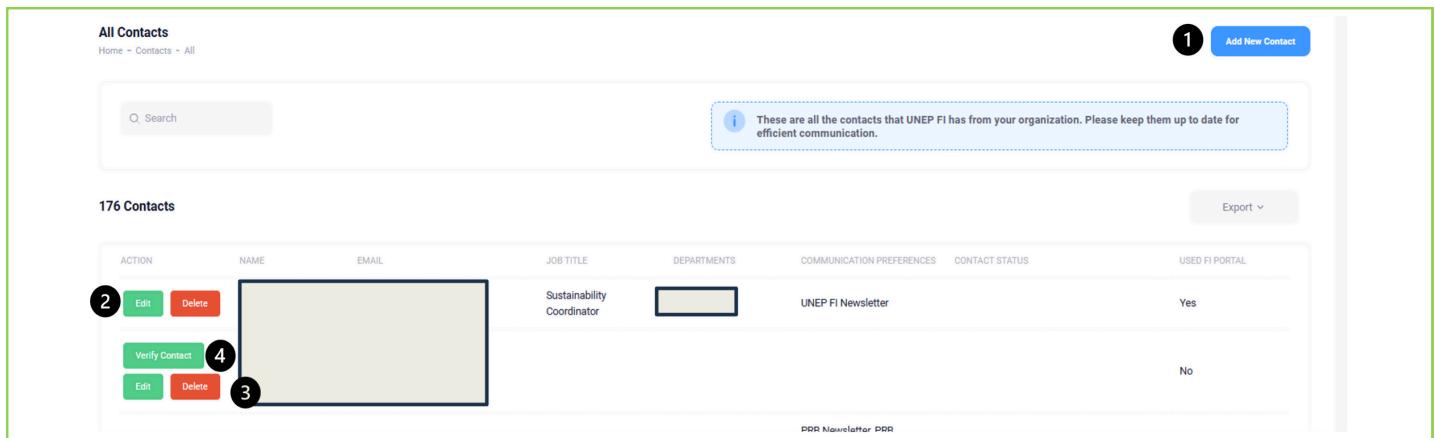
The contact will be saved, and a message will be displayed:



An email will also be sent to the specified address informing them that an account has been created for them, with instructions to activate their account:

Edit/Delete Contacts

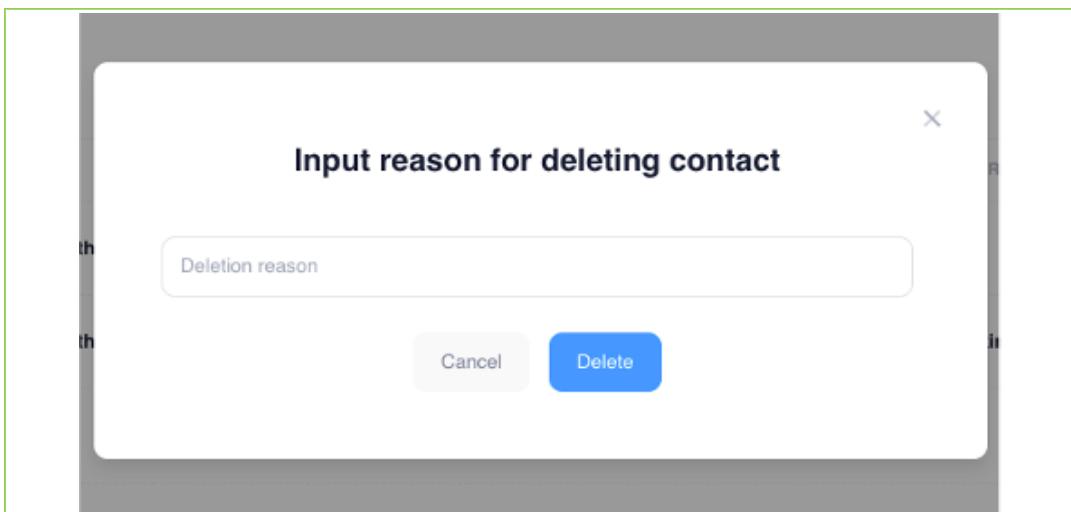
From the All-contacts page, for each contact, you have the option to Edit, Delete and sometimes to verify (when verification is still required for that contact)



1. Go to the contact you wish to Edit or Delete and press the button ,

2. Click the 'Save' button.

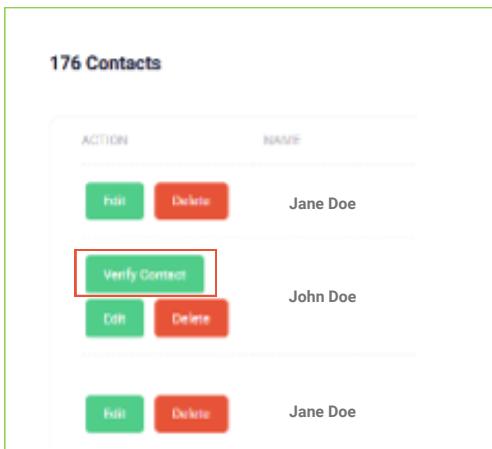
The contact details will be updated / deleted accordingly. When you delete a Contact, you will be prompted to fill in a short reason for deleting the contact:



Verify a Contact

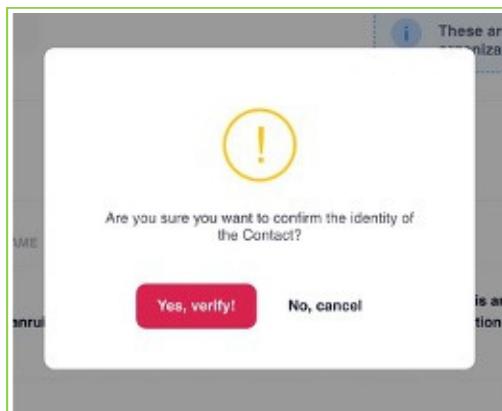
Follow this process to confirm the identity of a contact on the portal (See also the section "Account verification"). This grants contacts access to your institution's information, therefore, **only verify contacts that you know**

1. On the contacts table, Click the 'Verify Contact' button on the contact you would like to verify. You will be prompted to confirm verification of the contact's identity:

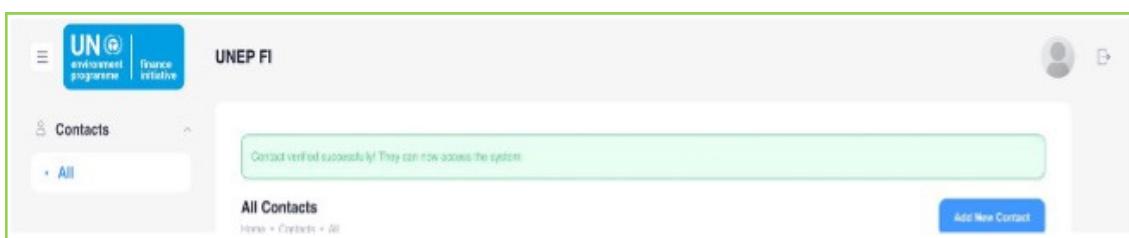


ACTION	NAME
Edit Delete	Jane Doe
Verify Contact Edit Delete	John Doe
Edit Delete	Jane Doe

2. Click the 'Yes, verify!' button to confirm the contact's identity.



The contact's identity will be confirmed, an email will be sent to them to inform them of their verification, and a message will be displayed on the screen:



Support

For further information on the Responsible Banking Journey, click here : [Responsible Banking Journey – United Nations Environment – Finance Initiative](#)

If you encounter any issues or have questions:

- Email UNEP FI Secretariat signatory@unepfi.org
- Contact your [regional UNEP FI focal point](#)