

## Current Trends in Philanthropic Giving

### WHY ATTEND?

In the first event of the 2016 *Philanthropy Programme* series, an expert panel will examine the status of philanthropic giving and the advisory market supporting it in the UK, as well as climate changes, trends, and the implications of opportunities and challenges in a changing market for the professional advisor. This session is not only suitable for all professional advisors, but also philanthropists interested in understanding the latest trends and changes affecting philanthropic giving.

## How To Register

For more information and to book, please visit:

[www.philanthropy-impact.org/the-philanthropy-programme](http://www.philanthropy-impact.org/the-philanthropy-programme)

[www.step.org/the-philanthropy-programme](http://www.step.org/the-philanthropy-programme)

### Delegate Rates

Members\* £65

Non-members £80

**\* Member rate includes: Philanthropy Impact Members, STEP Members, and STEP Philanthropy Advisors Special Interest Group (SIG) Members**

**Date** Monday 21 March 2016

**Time** 16:00 Registration; 16:30-18:00 Discussion;  
18:00 Networking Reception

**CPD** 1.5 hours, inc. SRA & STEP

**Venue** STEP, Artillery House (South), 11-19 Artillery Row,  
LONDON, SW1P 1RT, United Kingdom

**Nearest Tube** Victoria or St James's Park

**Panel:** Rhodri Davies, Charities Aid Foundation; Juliet Valdinger, Business Disability International; Bonny Landers, Sandaire Investment Office; Emma Turner, Barclays Wealth; Others TBC

### EVENT FOCUS

The past decade has seen a significant rise in the interest of philanthropy, with more donors looking to put money and effort into making the most of their giving. Yet the supply of philanthropy advice from professional wealth advisers remains modest at best, with few donors actually receiving professional advice about their giving.

Philanthropy and charitable planning are an important element of the work advisors can perform for their clients. The philanthropic conversation provides a unique opportunity for advisors to engage with clients on a more meaningful level and research confirms this with increased business through new referrals. Despite private client advisors being ideally positioned to proffer philanthropy advice, the significant opportunity remains relatively untapped with insufficient advisors proactively offering such client services.

## Terms & Conditions

All events qualify for 1.5 hours of structured training under Philanthropy Impact, STEP and other self-certified CPD schemes. Cancellations must be received in writing at least 7 working days prior to the event and will be subject to a £15 cancellation fee. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full event fee.

As joint owners of The Philanthropy Programme, Philanthropy Impact and STEP have joint ownership of all data, including delegate data. Data will not be shared with any third party organisations. By registering for events, you consent to receiving related emails from Philanthropy Impact and STEP.

Produced by:

