

Roundtable: Bristol

Increasing Philanthropic Giving: A Missed Business Opportunity for Professional Advisers

Date	Tuesday 18 October 2016
Time	16:00 registration for 16:30-18:00, followed by networking reception
Host	Bond Dickinson
Venue	3 Temple Quay, Temple Back East, Bristol, BS1 6DZ
CPD	90minutes (1.5 hours) self-certified CPD points
Chair	Robert Bourns, Chair of Trustees, Quartet Community Foundation
Panel	John Pepin, Chief Executive, Philanthropy Impact; Jermaine Smith, Legal Executive, Bond Dickinson; Richard Pendlebury, Philanthropist; others TBA

At this event Philanthropy Impact presents its research mapping the level of philanthropy advice amongst professional advisers (top 383 firms) in the UK and a survey of HNW and UHNW individual giving patterns. The result outlined three stages of philanthropy advice given by advisers to individuals and families of wealth. Results indicated that only one in five of the UK's advisory firms offer philanthropy advice even though clients are increasingly interested in receiving more of this.

The research also showed that philanthropists who take professional advice give 17 times more than those who do not. Only 12% of the UK's wealthy population received advice from professional advisers but their donations accounted for 58% of all giving. By increasing the number of professional advisers who give philanthropic advice we believe philanthropic giving could increase exponentially.

At the event the expert panel will explore

- how to start the conversation on philanthropy with clients
- the business opportunity for advisers
- risk and rewards on talking about philanthropy with clients
- how can we develop a culture of giving
- implications and opportunities of the results of the market research for advisers, philanthropists and charities.

This event is produced with support of Quartet Community Foundation

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Register by 16 October

Register online at www.philanthropy-impact.org

This event is free for Philanthropy Impact members. Not-for-profits £20, for-profits £30.

Philanthropy Impact

Our vision is to increase philanthropy and social investment across borders, sectors and causes. Our mission is to achieve greater sector knowledge and expertise. Through our links with key sector stakeholders we develop thought-leadership on philanthropy and social investment.

We do this by delivering activities that include:

- **Events:** a comprehensive programme of events that support professional training and development
- **Publications and Research:** our 'body of knowledge' guides, case studies and the acclaimed Philanthropy Impact Magazine
- **Advocacy:** we advocate for policies and regulations that encourage philanthropic giving and social investment

Philanthropy Impact would like to thank



for hosting and our Committee Members

Laura Chesham, Veale Wasbrough Vizards; Cecile Gillard, Burton Sweet; Greg Moss, Bond Dickinson; Huw Thomas, Triodos Bank; Sue Turner, Quartet Community Foundation

Making sense of and inspiring philanthropy