Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

TRAINING

CPD CERTIFIED The CPD Certification Service

CISI Chartered Institute for Securities & Investment ENDORSED CPD

# Purpose-Driven Advising: Mastering Impact and Values-Based Wealth Module

## This course has been developed specifically for private client professionals advisors

## TRAINING OVERVIEW

Philanthropy Impact's highly interactive training course is designed to equip professional advisors with the knowledge and confidence to engage clients in values-based discussions.

The first step of the learning journey for Professional Advisors comprises of 4 eLearning modules, equipping you with the groundwork for purpose driven advising (complete minimum 80 minutes, 6 CPD).

The next step is to attend the in-person 2-hour session (2 CPD), to apply your knowledge in a practical setting supported by our expert trainers.

Our client-centric training prepares advisors to lead with empathy and expertise, making them the essential first call for clients pursuing meaningful, values-aligned financial journeys.

## WHY ATTEND THIS COURSE

**In this live, interactive, tutor led training course, we take you through how you can:**

**Understand-** how to meet changing client demand for support on their impact investing and philanthropy journey
**Identify-** the commercial opportunities and the benefits to your firm from supporting your clients' philanthropy and impact goals
**Strengthen-** your ability to engage in values-based discussions with current and future clients about their sustainability, impact and philanthropic goals
**Learn-** why impact investing and philanthropy are essential tools in your sustainability toolkit and managing risks related to regulatory issues
**Recognise-** where this sits within your work and your organisations activities and how to get internal buy-in

Rating by (U)HNW clients of professional advisors for their philanthropy advice:

**5.9/10**

This course could help advisors achieve a rating of:

**10/10**

## BOOK NOW TO OPEN THE DOOR TO FINDING WAYS TO MEET CLIENT NEEDS AND EXPECTATIONS

**TO LEARN ABOUT OUR CPD CERTIFIED AND CISI ENDORSED TRAINING PLEASE CONTACT**

**PRICING: £450**

training@philanthropy-impact.org

**Discounts available for Members of Philanthropy Impact & LIBF**

## LEARN WITH PHILANTHROPY IMPACT

As an organisation at the intersection between ESG and impact investment, social investment and philanthropy our mission is to increase the flow of capital for good by enabling private clients and their families to match their purpose driven wealth strategies with their values, capturing their sustainable, social and ESG/Impact investment and philanthropy preferences across the spectrum of capital.

**This course is intended for professional advisors such as: private client advisors, wealth management, private banking, financial advisors, tax and legal sectors with an interest in values based client centric solutions for HNW clients**