NETWORKING EVENT

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

NAVIGATING WEALTH TRANSFER: STRATEGIES FOR SUCCESS

SPEAKERS' BIOS

George King IV- CHAIR

George is a Partner at MASECO Private Wealth and a senior investment professional with 25 years of financial markets experience who advises high net worth families on their cross border financial needs. For the first decade of his career, George was doing primary investment research as a Financial Analyst (CFA), spending most of that time as an Institutional Investor-ranked analyst at Credit Suisse First Boston in New York. Though responsible for a range of consumer industries, his notable coverage was the dynamic TMT (telecom, media, and technology) sector. The second half of his career has been focused on working with high-net-worth investor clients, principally with Alliance Bernstein (AB) and Royal Bank of Canada (RBC).

Working in New York, Miami and London, George has experience advising a very broad range of investors around the world on investment strategy and portfolio construction, across all major asset classes and multiple currency regimes. George has played a key role in helping to build wealth management businesses for both AB and RBC, across Florida and in London. He is a frequent speaker at industry conferences, writes for and is quoted in a range of publications, and makes regular appearances on TV and radio programs. Passionate about the critical importance of the intersection of wealth planning and investment management, he has earned a Certificate in Financial Services – Trusts and Estate Planning from the Society of Trust & Estate Practitioners (STEP). George has also joined the B Lab as a Trustee in 2023. As an American expat in the UK, George has lived through the issues on which he now advises US clients residing in the UK and elsewhere outside the US.

James Maloney

James advises a broad spectrum of charities, and those who fund, work with and regulate them, on the full range of charity law issues. He has a particular focus on advising philanthropists on the legal aspects of structuring their giving and sits on the STEP Philanthropy Advisors Global SIG Steering Committee.

James is a charity law specialist, helping clients with constitutional and governance matters, incorporations, mergers and restructuring projects. James has the knowledge and experience to ensure charities navigate the law on fundraising (including trading and commercial partnerships), investment, grant-making and charity property transactions. Philanthropy has become a key area of focus for James. He advises individuals and families, including through the formation of charities and alternatives. He advises on donor tax reliefs and on regulatory requirements. Recent work includes advice on complex cross-border issues.

James has particular experience of working with philanthropists, grant-making charities, sports organisations, livery companies, faith-based organisations and businesses establishing corporate foundations. His work is often international in nature.

James takes a collaborative approach with clients and their other advisers. He is pragmatic and ensures that advice is tailored for the client's specific circumstances. Helping clients to use legal advice to achieve their goals is the most satisfying part of his working life.
James qualified as a solicitor in 2005.

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Anna Josse

Anna co-founded Prism in 2004 to increase charitable funds into the sector. Previously, she worked in the high-tech industry and set up the Yazam EU office as Director of Investor Relations. Anna set up and ran the British arm of a USA based charity, the New Israel Fund.

Anna also acts as a trustee and advisor for several charities. She is the director and shareholder of the financial services company Regent Capital that specialises in investment products/services to UK-based HNW investors.