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 Values-Based Wealth Management and Meeting Changing Client Needs.

This course has been developed specifically for private client professional 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: 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: 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.

THE NEED FOR THIS TRAINING IS DRIVEN BY

Changing Client Expectations: Wealth holders are increasingly seeking to align their financial decisions with personal values and purpose, and are looking to their advisors for guidance on this journey.

Benefits to advisors and firms: Firms that are customer-centric and support clients in their values based wealth management advice activity consistently achieve stronger commercial performance, improved trust levels, and increased client engagement.

To Deliver Customer-Centric Advice: Advisors need to understand how to explore clients' motivations, ambitions, and long-term goals as part of developing impact strategies.

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:
training@philanthropy-impact.org
Or visit:
www.philanthropy-impact.org/training

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

WHY ATTEND THIS COURSE

In this interactive programme, you will learn how to:

Unlock commercial opportunities

- **Boost Your Business:** Advisors who integrate philanthropy and impact-aligned services see significantly stronger commercial outcomes, including higher assets, stronger organic growth, and increased new money compared to peers.
- **Expand Your Expertise:** Stay ahead of emerging expectations from next-generation wealth holders - including Millennials, Gen Z, and women of wealth - by broadening your advisory capabilities.

Master the regulatory landscape – managing risk

- Strengthen your confidence in managing risk associated with regulatory requirements related to risks by providing training about a values-based approach addressing customer centricity.

Transform your client relationships

- **Deepen Engagement:** Build the skills to connect your clients' financial strategies with the values and priorities that drive their decision-making.
- **Position Yourself as a Trusted Lynch-pin Advisor:** Enhance your ability to support clients more holistically, reinforcing loyalty and long-term advisory relationships.