Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

eLearning
FOR PROFESSIONAL ADVISORS

Purpose-Driven Advising: Mastering Impact and Values-Based Wealth Management

EMPOWER YOUR CLIENT RELATIONSHIPS

- **Engage Meaningfully:** Learn to align your clients' financial strategies with their values, motivations, and aspirations.
- **Become the First Call:** Position yourself as a trusted advisor, deepening relationships and fostering unparalleled loyalty.

UNLOCK COMMERCIAL OPPORTUNITIES

- **Boost Your Business:** Advisors offering philanthropy and impact investing services achieve up to 6x higher assets, 3x organic growth, and 1.3x new money compared to peers.
- **Expand Your Expertise:** Stay ahead of market trends and meet the needs of next-gen wealth holders, including Millennials, Gen Z, and women of wealth.

MASTER THE REGULATORY LANDSCAPE - MANAGING RISK

- Gain confidence in addressing **Consumer Duty compliance**, managing **Sustainability Development Disclosures**, and tackling complex **suitability discussions** with clients.

FLEXIBLE, ACCESSIBLE LEARNING

- Access the modules online at your convenience, balancing professional growth with your schedule. Engage at your pace to ensure mastery of the material.
- 6 CPD Points: Complete 4 modules over minimum 80 minutes.

CPD CERTIFIED The CPD Certification Service

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT ENDORSED CPD

THIS PROGRAMME IS NOT JUST ABOUT KNOWLEDGE – IT IS ABOUT ACTION.

By embracing this training, you will inspire transformative change, both for your clients and your practice.

Act Now and Shape the Future of Wealth Management.

Visit:

www.philanthropy-impact.org/training/#list-elearning

to get started

DON'T MISS THIS OPPORTUNITY TO REDEFINE YOUR APPROACH AND LEAD THE WAY IN PURPOSE-DRIVEN ADVISING.