NETWORKING EVENT

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Maximising Social Impact through Tax-Efficient Giving and Investment Strategies

SPEAKERS' BIOS

Dr Paddy Walker, Managing Director, J Leon & Co Ltd

Dr Paddy Walker is Managing Director of the Leon group, a fifth-generation family office. A graduate of Durham University and the Royal Military Academy Sandhurst (5th Royal Inniskilling Dragoon Guards), he holds an MBA from the Johnson Graduate School of Management at Cornell University. He has a further master's from the University of Buckingham's School of Modern War Studies. Dr Walker has a PhD from Buckingham's School of Humanities in the field of autonomous weapons and challenges to their deployment.

He is a Senior Research Fellow at the Humanities Research Institute and an Associate at the Imperial War Museum's Institute for the Public Understanding of War and Conflict. He also sits on the Development Board of the Museum. His recent book, 'War's Changed Landscape? A Primer on Conflict's Forms and Norms' was co-authored with RUSI's Professor Peter Roberts. A companion book, 'War Without Oversight: Why We Need Humans on the Battlefield', also published by Howgate, follows in 2024.

Formally Co-chair of the London Committee of NGO Human Rights Watch, he is a director of Article 36, a charity focused on reducing collateral harm to civilians from weapon systems. A previous chair of the UK's Institute of Family Business Family Office Forum, Dr Walker is a member of Leon's philanthropy Council. He is also a member of the Royal Company of Archers, the King's official bodyguard in Scotland.

Rachel Steeden, Head of Legal, Stewardship

Rachel is a solicitor with 17 years' experience advising private clients and charities. She enjoys working closely with clients and their advisers to help donors make complex gifts effectively and tax-efficiently.

She is a member of the Charity Law Association, STEP Special Interest Group for Philanthropy, Lawyers in Charities and Lawyers' Christian Fellowship. She is also on CityWealth's prestigious Top 10 Philanthropy Advisors 2024 list.

Rachel and her husband Derek lead a Bible study group at their church in central London. They're passionate about Church Planting in the UK and overseas, Bible translation and The Local Church.

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Jo Bateson, Partner, Mercer & Hole

An experienced private client advisor, Jo specialises in providing tax advice to wealth creators, families and their family offices, family businesses, and onshore and offshore trustees.

Jo advises on all private client tax matters from estate planning through to exit planning including providing support in making decisions for after retirement. She advises multi-generational family businesses to plan for succession as well as both onshore and offshore trustees to help them to keep on top of the ever-changing UK tax landscape, as well as people leaving and arriving in the UK.

With a particular interest in tax policy and having been part of various tax technical committees and think-tanks during her career, Jo uses her insight to help clients to navigate the uncertain tax environment that we currently find ourselves in. This wealth of experience is also extremely valuable in Jo's passionate support for female-founded businesses. She provides pertinent advice to women throughout their wealth creation journey as getting the right tax advice at the right time is a key part of this journey.

Providing consistently robust and practical advice helps Jo to build long-standing relationships with her clients. She has a straightforward and transparent approach to dealing with her clients' affairs getting to know their aims and objectives whilst explaining often extremely complicated tax matters in a way that resonates with them. This bespoke and personal approach is at the crux of everything she does to help her clients in the best way possible.

Jo re-joined Mercer & Hole as a partner in November 2024. This was a very welcome return to the firm as she initially joined as a graduate trainee in 2000, gaining her ATT, CTA and STEP qualifications. Jo went on to gain valuable experience at KPMG in the Family Office & Private Client Team where she rose quickly through the ranks to become one of KPMG's youngest partners. Along the way she has won many top industry awards including EPrivateClient's 'Top 35 under 35', Management Today's 'Top 35 under 35' and Tax Journal's 'Top 40 under 40'.

Jo's insight and experience is valued highly in the accounting world. She has authored many articles, spoken at conferences, and provided tax commentary for the media. Her skills and knowledge have also led her to become a trustee of Philanthropy Impact whose aim is to increase philanthropy amongst the wealthy. In addition, she sits on the tax technical committee of the British Business Angels Association and is a judge of the PAM Awards.

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George King, Senior Wealth Manager, MASECO Private Wealth

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.