NETWORKING EVENT

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Family Office: Strengthening Connections & Collaboration

SPEAKERS' BIOS

Jonathan Brinsden – Chair

Jonathan advises on a wide variety of commercial and constitutional issues affecting charities and is the first point of contact for many charity chief executives. He has assisted a number of charities with Charity Commission schemes and other regulatory issues relating to their activities. He has considerable expertise in a number of specialised areas including NHS charity regulation, impact investment and has worked with charities of all shapes and sizes in improving their governance systems and developing their legal frameworks. Jonathan has also built up a significant practice advising on fundraising.

Jonathan has a particular expertise in advising charities which operate internationally, in particular in helping overseas charities develop their franchise within the UK or UK charities with their cross border activities, often by a subsidiary or dual qualified charity. Jonathan is individually ranked as a Band 1 charities lawyer in Chambers and Partners UK 2020.

Kate Boswell

Kate is a Partner in the Family Office division of Stonehage Fleming. She brings over 10 years' experience as a trusted adviser to a wide client base, specialising principally in providing strategic and integrated investment, financial and tax planning to entrepreneurs and private equity professionals.

Kate joined the team in 2019 following over 7 years at Handelsbanken Wealth Management, where she headed up the Private Office – North team. Prior to this, she trained as a Chartered Tax Adviser, spending the majority of her time at Deloitte LLP, London. She holds a Law & Business degree from the University of Warwick and is a Member of the Chartered Institute of Securities & Investment. Kate is also a trustee of Envision, a youth social action charity based in London, Birmingham and Bristol.

Lauren Gupta

Lauren's professional experience started in secondary school Spanish classrooms, moved through Programme Management roles in the youth employability sector, and into the Data & Impact department of a social mobility charity. She has studied an MBA in Barcelona, where she learnt about strategy, marketing, and ethics, and she is increasingly active in the trust-based philanthropy space. On a personal level, she simply loves the beauty and calm of the natural world and believes it deserves to be protected and valued now and for the future.

Sarah Teacher

Sarah leads relationships with our external funders, and key projects for the organisation on sizing the UK impact investing market, place-based impact investing and encouraging charitable endowments to allocate for impact.

Sarah joined the Institute from Lendlease Europe where she was Social Impact Investment Manager. Prior to her work at Lendlease Sarah worked in roles at the intersection of social impact, sustainability and private capital – be that corporate investment or philanthropic. She was a Consultant at Sancroft International (2013-2017), an international sustainability consultancy focused on the social, environmental and ethical risks faced by major businesses; an Associate at On Purpose, a one-year programme for early-career professionals identified as future leaders in social enterprise (2012-13); and Director for Next Generation Philanthropy at the Institute for Philanthropy (2006-2010), leading workshops for philanthropists interested in increasing the impact of their giving.

Sarah graduated from Lady Margaret Hall College, Oxford, in 2005 with a first-class degree in Modern History, and obtained an MPhil in Development Studies from Clare College, Cambridge in 2011. She serves as the European Chair of Rockefeller Philanthropy Advisors Europe.

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Tom Piercey

With 15 years of experience guiding high-net-worth families through complex financial decisions, Tom is a senior relationship manager at C. Hoare & Co. and heads the family office and family business group. He began his career as a relationship manager at the Bank of Scotland before joining C. Hoare & Co. in 2010.

He looks after a diverse portfolio of high-net-worth families and their associated businesses, specialising in supporting them with complex banking and lending requirements. Tom's passion lies in helping families achieve their financial goals across generations.

He holds the Certificate in Mortgage Advice and Practice and the Certificate in Financial Advice. He holds a degree in Mechanical Engineering from the University of Leeds.