Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

TRAINING

CPD CERTIFIED The CPD Certification Service

CISI Chartered Institute for Securities & Investment ENDORSED CPD

CHANGING TIMES
Implications of changing client needs and demand and an advisory firms' need to respond

This course has been developed specifically for private client professional advisors

In partnership with

Quartet Community Foundation

Helping your clients make the greatest impact, locally

THE NEED FOR THIS TRAINING IS DRIVEN BY

Benefits to Advisors and Firms – Professional advisory firms that are customer centric offering their clients support on their philanthropic journey had 6x the median assets of those who do not offer this support, 3x organic growth, 1.3x new money, and higher trust levels.

Client Demand – The world is changing and with it the needs and expectations of wealth holders. They are seeking to align their wealth with their values. They expect support from their advisors with their purpose driven investment activities including on their philanthropic journey.

To be Customer Centric – It is essential for professional advisors to be equipped to talk to their clients about their values, motivations, ambitions and goals as part of the development of a sustainable impact investment and philanthropic strategy.

WHY ATTEND THIS COURSE

In this live, interactive, tutor led training course, we take you through how you can:

- **Understand the commercial opportunity** for providing support to clients on their donor journey
- Learn **best practice approaches** to improve meeting clients' wishes to align their wealth with their values, resulting in becoming the first call for clients
- Learn about the **23 distinct services** a (U)HNW client needs on their philanthropic journey and develop ways to **incorporate client support** into your advisory practice
- **Reach new clients**, enhance retention rates, leveraging philanthropy support services reinforcing a values based purpose driven advisory business leading to commercial growth

INFORMS, INSPIRES, ENGAGES

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

05 June 2024 | 13:00 BST

TRAINERS: **John Pepin,** *CEO, Philanthropy Impact* **Sianne Haldane,** *Founder, Boon Consulting*

HOSTED BY: RWK Goodman

LOCATION: One Castlepark, Tower Hill, Bristol BS2 0JA

CPD: 180 minutes (3 hours) self-certified CPD points

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register please email:
training@philanthropy-impact.org

COST: £400

LEARN WITH PHILANTHROPY IMPACT

As an organisation working across the spectrum of capital, our mission is to increase the flow of capital for good by enabling private clients and their families to match their purpose driven wealth strategies with their values, capturing their sustainable Impact investment and philanthropy preferences across the spectrum of capital.

This course which informs, inspires and engages, 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