Philanthropy Impact

Professional Development for Advisers

Changing Times: How to Meet Client Emerging Demand For Philanthropy and Social Investment Advice

Date	Thursday, 2 May 2019
Venue	MASECO Private Wealth, Burleigh House, 357 Strand, London WC2R 0HS
Timings	Registration, 8:30; training starts at 09:00, ending at 12:00
CPD	180 minutes (3 hours) self-certified CPD points
Trainers	Heiko Specking, Founder, specking+partners & John Pepin, CEO, Philanthropy Impact
Speakers	George King IV, Partner, MASECO Private Wealth

Changing Times

(U)HNWs' private clients' needs are changing. Research shows that they want more comprehensive and personalised support from their professional advisers to address their values-based economic and social goals. Driven by millennials and women with wealth, the growing demand for philanthropy and social impact investment advice and support provides increased opportunities for professional advisory firms.

Philanthropy Impact's evidence-based research (supported by Scorpio Partnership, CAF and other research) demonstrates:

- Philanthropy and social impact investment goals are a key driver for many (U)HNW clients' when managing their personal wealth
- Clients want more/better philanthropy advice, with guidance from their advisers
- Advisers can display their commitment to support clients on issues that they care about, bringing more depth to the client/adviser relationship.

Learning Areas

By attending this half-day intensive workshop, advisers will gain an understanding of the commercial proposition for providing this service to their clients, develop their philanthropy and social impact investment knowledge, plus learn practical skills to better support clients' expectations and needs. The session is highly interactive and gives advisers an opportunity to understand how philanthropy can incorporated in to their advisory practice.

A course designed specifically for professional advisers to (U)HNWI (Private Client, Wealth Management, IFA's, Tax, And Legal Advisers)

Register by 25 April (limited to 12 advisers)

Register by sending an email to registration@philanthropy-impact.org or cecilia.hersler@philanthropy-impact.org

Cost: £450 (includes access to the handbook "Getting Ready For Changing Times– Philanthropy Impact Handbook for Professional Advisers")

Discounts for Philanthropy Impact partners:

Corporate Standard 10%, Corporate Premium 20%; Individual members 10%

Cancellations received in writing 5 working days prior to the event will receive a full refund. It is regretted that cancellations made after this time will not receive a refund.

Philanthropy Impact

Our vision is a world where individuals and families engage in philanthropy and social investment, supported by advisers.

Our mission is to grow modern philanthropy by developing the skills and knowledge of professional advisers about philanthropy and social investment.

We deliver our mission by delivering activities to support our members and key stakeholders.

- Training and events
- Publications and Research
- Advocacy

Philanthropy Impact would like to thank MASECO Private Wealth for generously hosting this course.

We can also run bespoke group training workshops in your office. For more information, please contact us at info@philanthropy-impact.org or call at +44(0)2074077879

Making sense of and inspiring philanthropy