TRAINING COURSE

This course has been developed specifically for Professional Advisors

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

CHANGING TIMES: Meet the Client Demand For Philanthropy and Social Investment Advice

6th September 2022 | 9:00am BST

TRAINERS: **John Pepin,** *CEO, Philanthropy Impact*
Heiko Specking, *Founder, specking+partners*

SPEAKER: **TBC**

CPD: 3 certified CPD points

In partnership with

PIMFA
Personal Investment Management & Financial Advice Association

The shifting values of next generation investors are driving a greater need for a new kind of wealth management. They want more and better philanthropy advice and guidance from their advisors – but the professional advice community receives low ratings for this aspect of their service (average 5.9 out of 10). This training course focuses on what a 10 out of 10 rating should look like and prepares you to deliver this new and important part of your service.

WHY ATTEND:

- Bring greater depth to your relationships by displaying your *commitment* to support clients on the causes they care about
- Become a *confident practitioner* in the field of philanthropy
- *Understand* how philanthropy can be incorporated into your advisory practice
- Help your clients live their *values* and achieve their *goals*
- Acquire the knowledge, skills, and tools to leverage best practice and become a *pioneer* in this emerging field
- Receive *CPD points* and a free copy of the Philanthropy Impact *online handbook*–your go-to resource for delivering an effective philanthropy advice service and a follow up 1-hour consultation with Philanthropy Impact.

KEY LEARNING OUTCOMES

By attending this innovative online workshop, you will:

- Gain an understanding of the *commercial opportunity* that lies ahead
- Develop your philanthropy and social impact investment *knowledge*
- Learn practical skills to *better support* your clients' expectations and needs

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register for this online certified CPD training course please send an email to

brighton.mazwi@philanthropy-impact.org

COST: £450

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT AND PIMFA MEMBERS

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.

CPD CERTIFIED
The CPD Certification Service

Philanthropy Impact focuses on inspiring philanthropy and impact investing. Our mission is to grow modern philanthropy and social investment and to encourage impact investing by developing the relevant skills and knowledge of professional advisors to ultra high net worth individuals.

This course is intended for wealth advisors as well as lawyers and other professional advisors with an interest in suitability issues and ESG investing

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