

## Fundraisers: transforming your approach to fundraising, achieving greater results by working with professional advisers to (U)HNWI

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<b>Date</b>	Friday, 29 November 2019
<b>Venue</b>	KPMG, 20 Grosvenor St, Mayfair, London W1K 4QJ
<b>Timings</b>	Registration, 8:30; training starts at 09:00, ending at 12:00
<b>CPD</b>	180 minutes (3 hours) self-certified CPD points
<b>Speaker</b>	Jo Bateson, Partner, KPMG LLP
<b>Trainers</b>	Sianne Haldane, Solicitor & Head of Planned Giving Philanthropy, Cancer Research UK; John Pepin, CEO, Philanthropy Impact.

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This is a course developed especially for charity Major Donor and corporate fundraisers. The purpose is to inform and educate fundraisers who work with (U)HNWI, to understand the role of their professional advisers (private client advisers, wealth management, private banking, independent financial advice, tax and legal sectors and family offices); and how to strengthen professional relationships that will transform your fundraising. It will emphasise the use of business case language to enhance communication and focus on how to identify and meet the needs of advisers' clients.

### Adviser impact on Giving

Philanthropy Impact's research demonstrates that 12% of UK wealthy population take some sort of philanthropy advice from their advisers and their giving accounts for 58% of the £2B given annually. Advisers play a key role e.g. UHNW individuals when supported by advisers on their philanthropic journey give 17 times more - £335k vs. £19K.

### Content of the training

This course will look at how professional advisers work, their values and goals – what motivates them. As a fundraiser, working with professional advisers can transform fundraising by changing the traditional view of donors and how you can collaborate to support them. We will also explore what philanthropists are looking for when working with advisers. The course will give an overview of informative statistics and trends in HNWI and UNHWI giving and giving patterns in the UK and internationally and how the oncoming wealth transfer is shifting the face of wealth with women and millennials stepping up as a majority of wealth holders. The structures used by HNWI such as different tax reliefs and DAFs will be explored. The course will be highly interactive making use of case studies on how fundraisers can address solutions to challenges in innovative and collaborative ways. The implications of CRUK and another charity's research will be discussed.

### Questions to be addressed at the course

- What can fundraisers learn from advisers to change the way they view wealthy donors and philanthropy?
- Who are professional advisers and what motivates them? How can you as a fundraiser work together with them to help meet their client needs?
- What is the spectrum of advisers and what are their roles?
- Managing expectations of fundraisers
- What internal and external challenges do fundraisers face in this process?

### Register by 24 November (limited to 12 fundraisers)

Register by sending an email to [registration@philanthropy-impact.org](mailto:registration@philanthropy-impact.org) or [rachele.menditto@philanthropy-impact.org](mailto:rachele.menditto@philanthropy-impact.org)

**Cost:** £450

### Discounts for Philanthropy Impact partners:

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

Members of the Institute of Fundraising fee will be discounted to £380.

*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.*

### About Philanthropy Impact

Our vision is a world where wealthy individuals and families engage in philanthropy and social investment, supported by their professional advisers. Our mission is to grow modern philanthropy by developing the skills and knowledge of professional advisers about philanthropy and social investment. We achieve our mission by delivering activities to support our members and key stakeholders: training and events, publications and research, and advocacy.

## Making sense of and inspiring philanthropy