ROUNDTABLE

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Meeting Changing Client Expectations
Future Proofing Firms with a values-based approach across the Spectrum of Capital

9 January 2023 | 17:00 for 17:30

This event is generously hosted by

Brown ADVISORY
Thoughtful Investing.

FORMAT: Roundtable

CHAIR: ***Rennie Hoare****, Partner and Head of Philanthropy, C Hoare & Co*

PANEL: ***Jack Williams-Ellis****, Senior Business Development Manager, Vertical Future*
Ida Levine*, Director, Impact Investment Institute*
Rosanna Arikoglu, *Portfolio Manager, Brown Advisory*
Oliver Scutt*, Senior Associate, Bates Wells*

CPD: 90 minutes (1.5 self-certified CPD point)

BACKGROUND

There is a new generation of client base, rapidly growing through with the Great Wealth Transfer, driven by millennials, Gen Z and women of wealth (but not exclusive to), these clients are demanding a different kind of service from their wealth stewards. This new thinking is having an influence throughout the global economy, with financial regulatory bodies recognising the need for the financial services sector to change their approach to these clients (e.g., the new Consumer Duty regulations).

This is posing a complex problem for many Financial Institutions, particularly those with a large and long-standing traditional client base, often of a certain 'boomer' generation. How can they future proof their firms, whilst also meeting the needs and expectations of their traditional client base?

In this discussion we will explore the global trends we are seeing, the impact of the new regulations on customer relationships and how discussing values, ambitions, goals and motivations for wealth in the context of the spectrum of capital can bring solutions that many firms are seeking for their clients.
Followed by a chance to network with peers.

TOPICS TO BE COVERED INCLUDE:

- Global trends driven by the Great Wealth Transfer
- Impact of FCA Consumer Duty and MiFiD II
- Suitability on firms and what it means
- Sustainable and purpose centered wealth planning across the Spectrum of Capital
- The values, motivations and goals of
- Millennials, Women of Wealth and Gen Z
- (U)HNW clients

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SPEAKERS' BIOS

Rennie Hoare – CHAIR

Rennie joined C Hoare & Co in 2016 and was invited to join the partnership in 2018.

Rennie is Head of Philanthropy and chairs Messrs. Hoare Trustees (MHT); this includes the bank's donor-advised fund, the Master Charitable Trust. Previously, he worked at T. Rowe Price and was responsible for relationships with institutional investment consultants in the UK and Europe. Before joining T. Rowe Price in 2011, he spent time at both Threadneedle and Guinness Asset Management. He graduated from the University of York with a BA Hons in Politics and holds the Investment Management Certificate.

Rennie chairs Philanthropy Impact and is a trustee of the David Nott Foundation. He particularly enjoys mentoring the next generation of philanthropists.

Jack Williams – Ellis

Jack grew up in a rural part of Northern England on a mixed arable and livestock farm and enjoyed many of the rural pleasures that go with this environment. Through this experience, he became interested in the relationship between food, agriculture, and the climate. During university, he helped his family start the transition to regenerative agriculture with the ultimate goal of maximising the potential natural capital of the land.

Before joining Vertical Future, Jack spent the last four years heading up the expansion in North America of British-based agricultural tech company Hummingbird Technologies, which is at the cutting edge of precision agriculture in the specialty crop space. He was working with the conventional and organic open-field growers that supply 90% of the fresh produce to the U.S. and European markets. Jack studied Business and Finance at the London School of Economics and speaks Spanish having lived in Mexico City for the last two years.

Ida Levine

In addition to being a Director at the Impact Investment Institute, Ida is a principal with Two Rivers Associates Limited consulting on public policy, strategy and governance. She serves on the Financial Markets Law Committee, and the Advisory Board of the UCLA Institute of Carbon Management.

Previously Ida was a Board Director and Senior Vice-President and Senior Counsel of Capital Group (CG) and served as its Director of Public Affairs in Europe. Before CG, Ida was European Counsel with JP Morgan Investment Management and a Partner at the international law firm Jones Day (London and New York). Ida was a founding Director of the UK Investor Forum.

Ida has a keen interest in the Arts and is Vice-Chair of the Royal Academy of Dance Board of Trustees. She also is a Trustee of Dancer's Career Development (DCD) and the Maria Bjornson Memorial Fund.

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Rosanna Arikoglu

Rosanna is a portfolio manager within the firm's international private client and charity team. Prior to joining Brown Advisory in 2021, Rosanna was an associate director at Smith and Williamson where she spent 8 years looking after a broad range of private clients and charities. Rosanna also sat on the fund selection committee and was a member of the responsible investing team. Rosanna started her career at HSBC as an analyst in the Global Markets team.

Rosanna is a Chartered Wealth Manager (Level 7) and achieved her BA (Hons) in Ancient History from Durham University in 2011.

Oliver Scutt

Oliver is a Senior Associate in the Impact Economy team at Bates Wells and is passionate about purpose-driven business. He advises on a wide range of corporate and commercial issues across the impact investing, responsible business, social enterprise and charities space. He has a deep interest in the B Corporation movement and the interplay between business and human rights. In particular, the development, application and impact of the Modern Slavery Act.

Oliver trained and gained private practice experience with Pinsent Masons LLP and subsequently worked in financial services as legal counsel for 8 Miles LLP (a pan-African private equity fund) and Triple Point (an alternative investment management firm) focused primarily on project finance, venture capital and private equity transactions.