



Inspiring Philanthropy and Investing for Impact

Working with professional advisers to (U)HNWI, philanthropists and social impact investors, trusts and foundations, and charities.



JOIN OUR NETWORK OF PROFESSIONAL ADVISORS,
PHILANTHROPISTS, SOCIAL ENTREPRENEURS, IMPACT INVESTORS,
FUNDERS AND CHARITIES

WE ARE:



- a leading **Centre of Excellence** for philanthropy and social impact investment across Europe.
- a not-for-profit membership organisation with over **20 years experience** in philanthropy, social investment and ESG/impact investment.
- the 'go to' organisation for professional advisors to private clients and other organisations that support (U)HNWI, for all their philanthropy, social investment and ESG/impact investment questions and to **learn how to understand impact**.
- a service provider of **technical knowledge and effective learning journeys** for professional advisors and charities that want to learn how to meet (U)HNWI's rapidly emerging need for good and clear philanthropy and social impact investment advice within their wealth strategies.
- a global **network of over 11,000** Private Client Advisors from leading Private Banks, Wealth Management Firms, Tax Firms, Legal Firms and other Financial Advisory firms, as well as, Philanthropist, Social Investors, Social Entrepreneurs, thought leaders from the third sector and other high-profile members of the philanthropy and social impact investment space.
- a community of members that are all committed to improving the standard of advice given to clients on how to **use their capital for good right** across the investment spectrum.
- a route to market.

JUST A FEW OF OUR MEMBERS



EDMOND
DE ROTHSCHILD



BST IMPACT



Hawksford



TILNEY
SMITH &
WILLIAMSON



CHARLES
STANLEY

J Leon Group

J.P.Morgan

FARRER & Co



MACFARLANES



Buzzacott
CHARTERED ACCOUNTANTS

Cazenove
Capital



MILLS & REEVE



Rathbone
Greenbank
Investments



withersworldwide



National
Philanthropic
Trust

Mishcon de Reya

Social
Investment
Business



Philia
International



Schroders



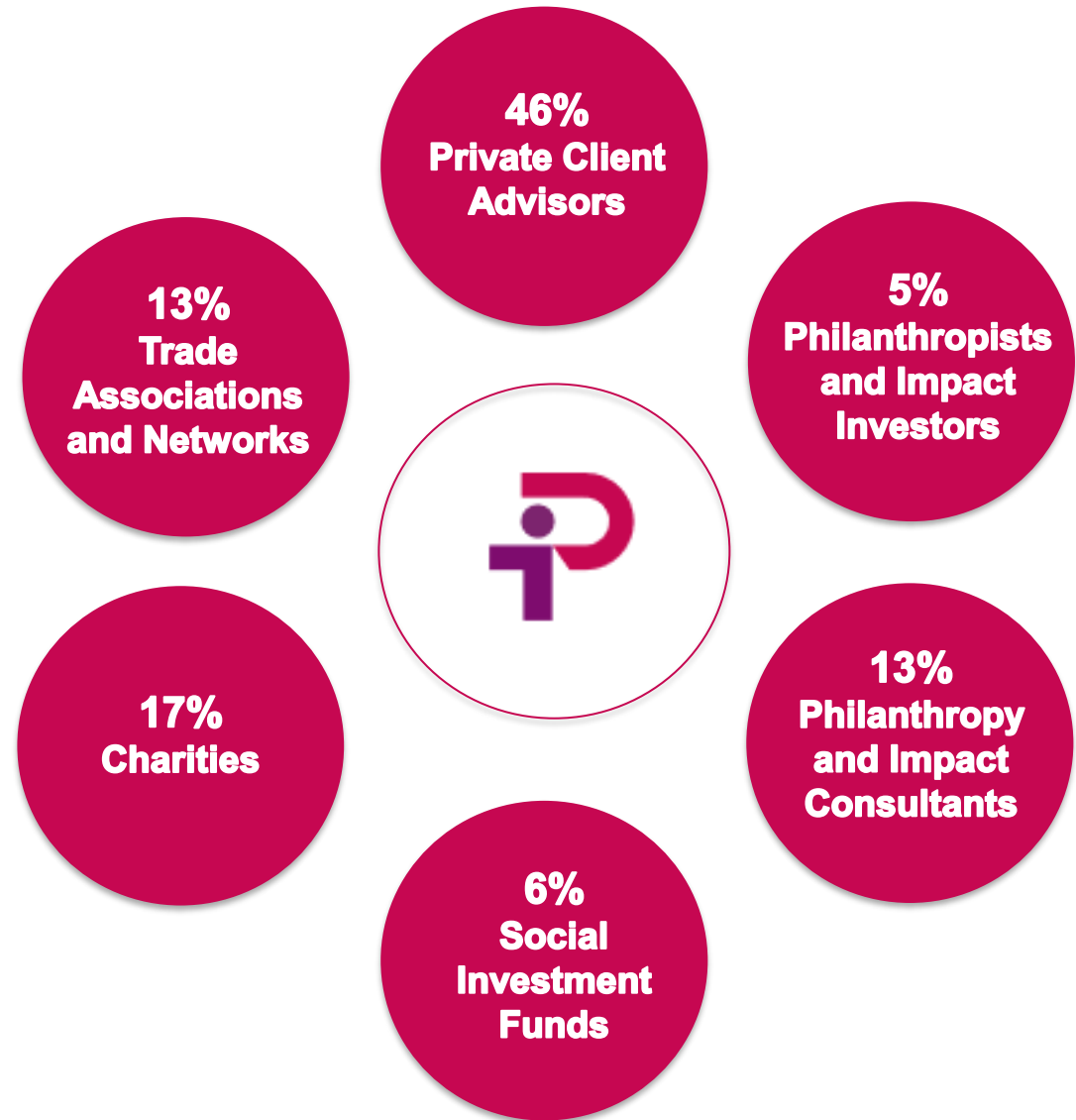
MAURICE | TURNOR | GARDNER

OUR COMMUNITY

We are a unique organisation at the intersection between philanthropy, social and ESG/impact investment.

Our membership community, and our wider network of speakers, magazine recipients and strategic partners, is made up of Private Client Advisors from leading Private Banks, Wealth Management Firms, Tax Firms, Legal Firms and other Financial Advisory firms, as well as, Philanthropist, Social Investors, Social Entrepreneurs, thought leaders from the third sector and other high-profile members of the philanthropy and social impact investment space.

We are a space for true collaboration, discussion and learning.



PHILANTHROPY IMPACT RESEARCH

NEXT GEN AND WOMEN OF WEALTH

THE SHIFTING VALUE OF NEXT GEN AND WOMEN OF WEALTH IS CREATING THE NEED FOR A NEW KIND OF WEALTH MANAGEMENT: GREATER ENGAGEMENT WE ARE ON HAND TO SUPPORT YOUR ADVISORS WITH THIS SHIFT.

Rated philanthropy services given by advisors across all sectors as poor: **(aver) 5.9 out of 10**

Clients want more or better philanthropy advice and guidance from their advisors

Clients no longer want just a financial return, more values based with purpose

Good for professional advisory business long term (client retention and reaching new clients)

MILLENNIAL AND A WOMAN OF WEALTH

“

As a next gen woman of wealth seeking to engage in values aligned impact investing and philanthropy, the role of my advisors is absolutely essential to enable me to achieve my economic and social goals. As I inherited at a very young age and took on a lot of family responsibility when I was relatively inexperienced, my advisors were particularly important in helping me find my way; in managing the intergenerational transfer of wealth, and in aligning my values with my investing and philanthropic activities.

My aim now is to use my personal wealth as a force for good and to have systemic change in the key areas / sectors that are of utmost importance to me. To achieve my objectives, the advice and guidance from my advisors is crucial in creating a holistic strategy that places impact and philanthropy at its very core and in transforming my goals into reality.

”

WHY JOIN OUR MEMBERSHIP COMMUNITY?

RETAIN CLIENTS

Stay ahead of the curve and meet the emerging client's need for holistic values-aligned advice for their wealth.

Philanthropy Impact offers certified CPD training and a programme of educational events to enhance the professional development of the whole of your team in this rapidly evolving space.

We support your team to ensure you are offering your clients a 10/10 service for philanthropy and social impact investment advice to support your clients to achieve their wide range of goals and ambitions.

REACH NEW CLIENTS

Be seen as global leaders with our brand association, Philanthropy Impact is a leading and globally recognised centre of excellence in this space.

Our publications, bi-weekly newsletter, webinars and events reach a network of over 11,000 active individuals across the globe, mainly in Europe but including Asia, Middle East, North and South America.

As members you get to host events, sponsor and contribute to publications, shape panel discussions and contribute and newsletters to reach new clients.

REPUTATION

The world is changing rapidly. As we 'build back better' after COVID-19, a firm's reputation is everything.

Our corporate members are carefully curated to ensure that we have only those that demonstrate best practice and continued learning in purpose and values.

Our membership directory is a way for clients to see whether your firm is dedicated to ensuring the best advice in philanthropy and social impact investing to support your clients to achieve their wide range of goals and ambitions.

WE SEE OUR MEMBERS AS PARTNERS IN OUR MISSION

“ *Philanthropy Impact is a catalyst for collaboration, knowledge sharing and innovation. We work with many strategic partners to shape the philanthropy, social investment and impact space, and to ensure that together we can be as impactful as possible.* ”
John Pepin – CEO, *Philanthropy Impact*

Join us to Innovate

We are the official secretariat for the All Party Parliamentary Group for Philanthropy and Social Investment.

Members are welcome to join our Board committees that include Public Affairs.

Be with us as we develop and implement the professional accreditation in philanthropy and social investment advice.

Join us to Collaborate

We give you a platform to share your best practice experience, innovations and learnings with others in the network.

Position yourselves at the forefront of social, political and economic thinking.

Members are invited to collaborate and share.

Join us for Support

Philanthropy Impact offers expert and confidential guidance in the area of philanthropy and social investment advice.

We are here to help you support your client through challenges faced when considering their philanthropy and social impact investment journey.

Members get our support and expertise.

MEMBERSHIP BENEFITS - ANNUAL SUBSCRIPTION



		NON-MEMBER	INDIVIDUAL	CORPORATE	PREMIUM
		FREE	£250	£995	£1,650
INSIGHT Publications	Member area on PI Website		✓	All Employees	All Employees
	Bi-weekly newsletter	✓	✓	All Employees	All Employees
	PI quarterly online magazine	✓	✓	All Employees	All Employees
	Members only mailing list		✓	All Employees	All Employees
INSIGHT Events	Host a networking event with one panelist			✓	✓
	Free access to networking events online and face to face		✓	All Employees	All Employees
	Walk in my Shoes Series live participation		✓	All Employees	All Employees
	Invite up to three guests to events				✓
INSIGHT Training	Priority to speak at events			Senior Level	Senior Level
	Invitation to be a guest speaker at a training workshop			Senior Level	Senior Level
	Cost of training workshop per delegate	£450	£405	£382	£360
INSIGHT Changemaker	Invitation to join one of our Board Committees				✓
	Inhouse-expertise support			✓	✓
BRANDING Website	Highlighted listing in online directory (with logo and link)				✓
	Website Listing in online directory (without logo or link)		✓	✓	✓
	Priority on 'Expert Opinion' articles		✓	✓	✓
	Article online submission	✓	✓	✓	✓
	Discounted advertising banners			10%	20%
BRANDING Bi-weekly Newsletter	Featured in member profile with image and logo				✓
	Discounted advertising banners			✓	✓
	Priority for submitted articles for sharing		✓	✓	✓
	Share articles	✓	✓	✓	✓
BRANDING Quarterly Magazine	Invitation to sponsor magazine				✓
	Priority for article submission		✓	✓	✓
	Submit articles	✓	✓	✓	✓
	Discounted advertising			10%	20%
BRANDING Events	Discount on sponsoring face to face events			10%	20%
	Invitation to sponsor a webinar				✓
BRANDING Training	Discount on sponsoring of training workshops			10%	20%
	Logo branding on literature in workshops				✓

OUR STRATEGIC PARTNERS



Collaboration is key...



CENTRE OF EXCELLENCE

EVENTS PROGRAMME

We curate an extensive programme of events to enhance your professional development.

We focus on market trends and practical solutions to ensure you stay ahead of the curve in advising clients on their impact journeys.

Our shared learning experience ensures you are offering the best philanthropy and social impact investment advice.

"The description of the impact continuum and how it relates to different clients was very helpful and I have used it with clients a lot since the training"

TRAINING WORKSHOPS

Interactive workshops that provide you with the skills and knowledge to develop your service offering. We cover evidence based commercial opportunities focused on:

- Market trends to position organisations at the forefront of social, political, and economic thinking.
- Solutions and skills to enhance conversations with clients on social impact investing and philanthropic giving for maximum client retention.
- Understanding market trends on sustainable investing and how to structure the suitability conversation.

COMING SOON...

Philanthropy Impact is working towards:

- creating an industry recognised accreditation in philanthropy and social investment advice.
- the Directory of Resources for philanthropy and social investment advice.
- a new website launch with Resource Hub and Guide to Giving.

"The course gave me and my colleagues confidence to have conversations about philanthropy and how to fit it in when talking about tax and structures"

We provide you with the tools to **stand out** in the advisory space through certified CPD workshops

TESTIMONIALS – WHAT OTHERS HAVE TO SAY

“ *Philanthropy Impact is a safe learning space for me as I navigate the ever-increasing demand for advice on Philanthropy and Social Investment. I have seen a step-change in the expectations from my clients in recent years particularly around transfer of wealth to next generation and I have found the insight Philanthropy Impact and their network bring invaluable.* ”
Private Client Advisor – KPMG

“ *I believe Philanthropy Impact has a key contribution to make as a forum to encourage more – and more effective – philanthropy and social investment through the exchange of ideas, spreading knowledge and improving the professional advice available. This is more important than ever.* ”
Lord Janvrin – Philanthropist

“ *Philanthropy Impact’s events are about the only industry events I attend, they have the right mix of interesting speaker, topic and diversity of audience to make it worthwhile. I know many of my team have attended over the years and really find them useful.* ”
Partner – Bates Wells LLP

TESTIMONIALS – WHAT OTHERS HAVE TO SAY

“Just wanted to send a quick thumbs up on the PI Webinars. They've been a great way to stay involved while I'm not in the office! I've really enjoyed the topics and speakers - AND 30-minute format!”

Michelle Fugiel Gartner – Chartered Philanthropy Advisor, MFG Change

“Since beginning our membership with Philanthropy Impact and attending your events and training, as a team, we feel inspired and empowered to have these vital conversations with our clients and we are already seeing the positive results.”

Darren Kelland – Global Head of Private Client Services, Hawksford

“I value membership of Philanthropy Impact because it convenes the principal stakeholders who can drive impact and change through philanthropy.”

Alexander Rhodes – Head of Mishcon Purpose,
Mishcon de Reya LLP

MEET OUR BOARD



CHAIR: RENNIE HOARE
Partner and Head of Philanthropy
C Hoare & Co



VICE CHAIR: GEORGE KING IV
Partner
MASECO Private Wealth



EDDIE FINCH
Partner
Buzzacott



DARSHITA GILLIES
CEO and Founder
Blu Dot and Maanch



CERIS GARDNER
Partner
Maurice Turnor Gardner LLP



KEITH MACDONALD
Senior Adviser Wealth Management
Ernst & Young



JO BATESON
Partner
KPMG



NANDU PATEL
Head of Charities and Asset
Consultant Relationships
Barclays Private Bank



CATH DOVEY
Co Founder
The Beacon Collaborative



JAMIE BRODERICK
Impact Investor
Impact Investing Institute



LYN TOMLINSON
Head of Philanthropy and Impact
Cazenove Capital



RICHARD CASSELL
Partner
Withersworldwide LLP



SARAH FARROW
Partner
Frank Hirth

TESTIMONIALS – WHAT OUR PEOPLE SAY

“ Giving is easy but giving well is hard. Across the charity landscape, there are glaring short- and medium-term requirements that need to be weighed up. As with any complex decision, trusted advisors can play an important role. Used correctly, they can help funders unlock the greatest impact from their own considerable acts of kindness. ”

Rennie Hoare – Partner and Head of Philanthropy,
C Hoare & Co

“ Following the pandemic even more wealthy individuals are becoming socially and environmentally conscious with their wealth. Now is a critical time for advisors to add philanthropy and social impact advice into their practice. ”

Cath Dovey – Co-Founder The Beacon Collective

TESTIMONIALS – WHAT OUR PEOPLE SAY

“ *Philanthropy should be an integral part of a good advisors core practice and is part of providing holistic values aligned wealth planning advice.* ”

Alana Petraske – Partner, Withersworldwide LLP,
New York

“ *Multiple advisors are involved in different parts of the advice chain, but to be the best advisor you need to understand where you can direct clients. PI provides you with this direction whilst also providing the professional learning journey for those that want to acquire the skills to add philanthropy and impact into their core practice.* ”

George King IV – MASECO Private Wealth

THANK YOU



JOHN PEPIN
Chief Executive Officer



ZOFIA SOCHANIK
Director, Membership
and Development



EVELINA DAMIAN
Communications and
Events Manager



BRIGHTON MAZWI
Training Executive



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