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

NEDBANK  SKYLARK WORKS  prism  Edmond de Rothschild  UnLtd  BST Impact  SK Stone King  Big Society Capital  SDG Changemakers

Russell Cooke  BDO  Hawksford  Tilney Smith & Williamson  C Hoare & Co  Affinity

Charles Stanley  J Leon Group  J P Morgan  Farrer & Co  Bates Wells  KPMG  Macfarlanes

EY  Frank Hirth  Buzzacott  Cazenove Capital  Brown Advisory  MASECO  CRS

Charles Russell Speechlys  LCM Family

Mills & Reeve  Coutts  Rathbone Greenbank Investments  CAF  HSBC Resonance

Mishcon de Reya  Social Investment Business  Social Finance

Withers Worldwide  3DB Pitmans  aperio  National Philanthropic Trust  Wise

Philanthropy Impact

Inspiring transformative philanthropic and social impact investment for a better future
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)
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.
Inspiring transformative philanthropic and social impact investment for a better future

WHY JOIN OUR MEMBERSHIP COMMUNITY?

RETAI N 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.
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**
<table>
<thead>
<tr>
<th>Membership Benefits - Annual Subscription</th>
<th>Non-Member</th>
<th>Individual</th>
<th>Corporate</th>
<th>Premium</th>
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<td>Discounted advertising</td>
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<td>Discount on sponsoring of training workshops</td>
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<td>Logo branding on literature in workshops</td>
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Price details for: All Employees | Senior Level
OUR STRATEGIC PARTNERS

Collaboration is key...

The Beacon Collaborative
THE INVESTMENT ASSOCIATION
PIMFA
UKSIF
Next Philanthropy
Next Philanthropy
@lliance
WINGS
Cabinet Office
owenjames
LONDON FUNDERS
Jersey Finance
STEP
NEXUS
avpn
Managing Partners’ Forum
evpa
INVESTING FOR IMPACT
PCD Club
WEALTHiHER network
impact investing institute

Inspiring transformative philanthropic and social impact investment for a better future
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.

"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

**Inspiring transformative philanthropic and social impact investment for a better future**
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

Inspiring transformative philanthropic and social impact investment for a better future
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
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

FOR FURTHER INFORMATION EMAIL: ZOFIA.SOCHANIK@PHILANTHROPY-IMPACT.ORG