Philanthropy Impact

Professional Development for Advisers

Changing Times: How to Meet Client Emerging Demand For Philanthropy and Social Investment Advice

Date	Friday 29 June 2018
Venue	Maurice Turnor Gardner, Milton House, 1 Milton St, London EC2Y 9BH
Timings	Registration, 8:30; training starts at 09:00, ending at 12:00
CPD	180 minutes (3 hours) self-certified CPD points
Trainers	Heiko Specking, Founder, specking+partners & John Pepin, CEO, Philanthropy Impact
Speakers	Ceris Gardner, Partner, Maurice Turnor Gardner LLP George King IV, Partner, MASECO Private Wealth

Changing Times

(U)HNWs' private clients' needs are changing. Research shows that they want more comprehensive and personalised support from their professional advisers to address their values-based economic and social goals. Driven by millennials and women with wealth, the growing demand for philanthropy and social impact investment advice and support provides increased opportunities for professional advisory firms.

Philanthropy Impact's evidence-based research (supported by Scorpio Partnership, CAF and other research) demonstrates:

- Philanthropy and social impact investment goals are a key driver for many (U)HNW clients' when managing their personal wealth
- Clients want more/better philanthropy advice, with guidance from their advisers
- Advisers can display their commitment to support clients on issues that they care about, bringing more depth to the client/adviser relationship.

Learning Areas

The awareness of philanthropy and social impact investment is ever-increasing. Providing the appropriate professional advice and tools require a focused and knowledgeable approach.

By attending this half-day intensive workshop, advisers will gain an understanding of the commercial proposition for providing this service to their clients, develop their philanthropy and social impact investment knowledge, plus learn practical skills to better support clients' expectations and needs.

A course designed specifically for professional advisers to (U)HNWI (Private Client, Wealth Management, IFA's, Tax, And Legal Advisers)

Register by 25 June (limited to 12 advisers)

Register by sending an email to registration@philanthropy-impact.org

Cost: £450 (includes access to the handbook "Getting Ready For Changing Times– Philanthropy Impact Handbook for Professional Advisers")

Discounts for Philanthropy Impact partners:

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

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.

Philanthropy Impact

Our vision is a world where individuals and families engage in philanthropy and social investment, supported by advisers.

Our mission is to grow modern philanthropy by developing the skills and knowledge of professional advisers about philanthropy and social investment.

We deliver our mission by delivering activities to support our members and key stakeholders.

- Training and events
- Publications and Research
- Advocacy

Philanthropy Impact would like to thank Maurice Turnor Gardner LLP for generously hosting this course

We can also run bespoke group training workshops in your office. For more information, please contact us at info@philanthropy-impact.org or call at +44(0)2074077879