



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, nonprofit organisations, thought leaders from the 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 CORPORATE MEMBER NON-PROFITS



JUST A FEW OF OUR CORPORATE MEMBER FIRMS



MILLENNIAL AND A WOMAN OF WEALTH

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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.

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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.

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.

Join us for Support

Philanthropy Impact offers expert and confidential guidance.

We are here to help you support your team through challenges faced when working with U(HNWI) donors and their advisors.

OUR STRATEGIC PARTNERS

Collaboration is key...

**FUTURE
PLANET**

Phile^{ea}


WEALTHIER
network



The Beacon Collaborative

Next Philanthropy →

@lliance



Cabinet Office


owenjames




Jersey Finance
Delivering Insight • Driving Innovation

STEP
SPECIAL INTEREST GROUPS

 **NEXUS**

avpn








evpa
INVESTING FOR IMPACT

 **PCD Club**

PIMFA
Pension Investment Management & Financial Assets Association



MEMBERSHIP BENEFITS - ANNUAL SUBSCRIPTION						NON-MEMBER	INDIVIDUAL	CORPORATE	PREMIUM
						FREE	£200	£795	£1,350
 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								✓
	Priority to speak at events							Senior Level	Senior Level
 INSIGHT Training	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								✓

SELF-CERTIFIED CPD TRAINING AND EVENTS - 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 donors 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 fundraising. We cover evidence based commercial opportunities focused on:

- Market trends to position organisations at the forefront of social, political, and economic thinking.
- Create business case for your donors that speak to their values and goals.
- Solutions and skills to enhance conversations with donors on social impact investing and philanthropic giving to become your donor's trusted advisor.

WALK IN MY SHOES

With a net promotor score of 9/10 our weekly web series is a useful tool for charities. Sessions are 30 minutes and you have the chance to pose questions to the panel.

Join our incredible network weekly to discuss pertinent topics in philanthropy, social investment and impact investing.

Learn what is important to your donors, their trusted advisors and be part of the conversation.

"This series has been really inspirational, a stimulating 'cup of tea' moment each week"

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

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
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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 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

“ Even though we are all forced into digital, even now, I manage to make interesting new connections at each session I attend. I am renewing because there is no other impact network that has managed that for me yet! ”

Karen Brady – Director, Liverpool School of Tropical Medicine

“ 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

THANK YOU



JOHN PEPIN
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