



## **Call for Articles**

**An invitation to write an article for the next Philanthropy Impact Magazine Issue 23 (Spring 2020)**

### **Working title**

**Facing the Greatest Challenges for Society over the Coming Years  
The Role of Philanthropy/Social and Impact Investment  
The Role of Professional Advisers to (U)HNWI**

Articles should address the theme from the author's perspective, or an author may propose an alternative topic within the theme for this edition.

It is important to hear from professional advisers as well as philanthropists, social/impact investors, trusts and foundations, and other key stakeholders.

When published, the magazine has an initial exposure to our contact list (13,000+) composed of professional advisers to (U) HNWI (private client advisers, wealth management, private banking, independent financial advice, tax and legal sectors), philanthropists and social investors, trusts and foundations, and charities.

By 30 March 2020 please email John Pepin at [john.pepin@philanthropy-impact.org](mailto:john.pepin@philanthropy-impact.org) with your suggested topic prior to writing the article. The ideal article length is around 1,000 words. The deadline to submit an article is 15 April 2020.

### **Background**

In this issue of the Philanthropy Impact Magazine we will look at what role professional advisers to (U)HNWI and their families can play in supporting the transformative challenges that the world is facing, both on a national and international level. Whilst exploring how Philanthropy and Social investment can be used as a force for change, and for good, in the challenges faced.

### **Societal Issues**

Climate change, income inequality, digital technology changes, migration and poverty are some of the critical issues that our society need to face over the upcoming years.

- How can entrepreneurs, philanthropists and social investors, and impact investors address these issues; and develop solutions that are transformative, innovative and entrepreneurial?
- What examples of solutions exist that others can replicate and adapt - the game changers?
- What innovations are there, and do they work?

- What role can professional advisers play in supporting their clients on their client's donor, social investment and impact investment journey – addressing the changing needs of professional advisers' clients?
- What is the role of government in partnership with social entrepreneurs, philanthropists, social and impact investors?
- How will digital technology impact on these approaches and future transformative innovations? What is the potential disruption in philanthropic giving due to robots/AI/digital technology/blockchain? What is the role of digital technology?

From a different perspective: **Cartier boss with \$7.5bn fortune says prospect of the poor rising up 'keeps him awake at night'**

- In a time when the very wealthy are worried and their wealth is being questioned due to the growing income inequality, why is the need for philanthropic and social investment exemplars and supportive advice from their professional advisers essential?
- Is wealth creation, wealth management including philanthropic giving and social impact investment one of the keys to living the values of the wealthy while addressing societal problems?

## Professional Advisers

From the perspective of the professional advisory sector what are the critical issues facing advisers and their firms? What are the changes expected and how will they impact on professional advisers to (U)HNWI e.g. women of wealth, millennials/next gen, technology, etc? What changes will professional advisers have to make in order to meet the growing demand from clients for support on their philanthropic, social and impact investment journey?

In relation to advisers, do you have inspiring stories to tell about clients who are addressing societal issues – exemplars?

With reference to impact investing:

- Is impact investing about saving the world driving positive social and environmental change. Is it in practice is it in its infancy? Is it impactful? Has there been real progress? Does it work? How can it be done right?
- What are the various approaches to impact investing and their efficacy; addressing the continuum of capital from responsible to sustainable and impact driven investment, to social enterprise to philanthropy?
- What is the importance understanding 'impact' and the impact measurement tools that fit with philanthropy and social impact investment? What is the need for a value based conversation to understand the impact goals of clients ensuring impact can be communicated to them in a way they understand?
- Are professional advisers to (U) HNWI prepared for the various forms of social impact investing? The Corley Report indicates there is a need to strengthen their competence and confidence. What is needed to support the shift to impact investing e.g. agreed best practice, adjusted rewards, products, regulatory drivers, better reporting, and the need to improve the deal flow and the ability to invest to scale? How should advisers respond to the increasing demands for sustainable investing products? How should advisers adopt these strategies and understand what impact they are actually generating? What information is required?

- Is there a lack of sustainable/impact investment of the billions invested by charities including not investing to influence listed companies to improve practices, products, and contribute to the SDGs?
- How are venture philanthropists and impact investors working together to fund early-stage impact enterprises?
- What are the current trends in social/impact investing? What do people see as the future of social/impact investing?
- Working with private clients; should impact investing be viewed as a type of philanthropy or should it be treated differently? What is the balance between the two?
- What is the impact of SDGs?