Breakfast seminar

Philanthropy advice in the regions — Supporting philanthropic change

Date	Tuesday 28 November 2017
Time	08:15 registration for 08:30-10:15
Host	LCM Wealth Management
Venue	The Clink Restaurant, HM Prison Styal. Wilmslow, SK9 4HR
CPD	90minutes (1.5 hours) self-certified CPD points
Chair	Lizzy Steinhart, Philanthropy Advisor, LCM Wealth Management
Panel	John Pepin, CEO, Philanthropy Impact; Zoe Sheppard, Philanthropist; Evita Zanuso, Director Financial Sector & Investor Engagement, Big Society Capital; Alana Petraske, Special Counsel, Charities and Philanthropy, Withers LLP; Steven Appleton, Partner, Brabners LLP.

(U)HNW private clients' needs are changing. Research shows that they want more comprehensive and personalised support from their professional advisors 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.

This is an event aimed at updating professional advisors in the North West who work with high net worth private clients, family businesses and charities on current philanthropic practices and the changing social finance landscape.

During the session Philanthropy Impact, the UK's leading body addressing philanthropy engagement across sectors, will present its research mapping on the level of philanthropy advice amongst professional advisors (top 383 firms) undertaken in Autumn 2015 in the UK and a survey of HNW and UHNW individual giving patterns.

In addition, speakers will be providing an overview of the social investment market place and the local issues in the North West. The panel will also address why professional advisors should seek deeper philanthropic conversations with clients and the benefits that this will bring.

Register by 21 November

Register online at www.philanthropy-impact.org

This event is free for Philanthropy Impact members. Not-for-profits £20, for-profits £40.

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 providing activities such as training and events; publications and research; and advocacy, to support our members and key stakeholders.

LCM Wealth Management

Based in Cheshire and London, we offer independent, thoughtful and well-researched advice on wealth management issues for (U)HNW individuals and families offering a range of investment, tax, retirement, succession planning and philanthropic guidance.

Philanthropy Impact and LCM Wealth Management would like to thank

Making sense of and inspiring philanthropy