



The refugee crisis — Can wealth advisers unlock new philanthropy?

9 March 2017

- Chair** Melanie Roberts, Partner (Charities Team), Sarasin & Partners
- Speakers** Rachel Harrington, Director, Coutts
- Sara Llewelin, Chief Executive, Barrow Cadbury Trust
- Paddy Walker, Managing Director, J Leon Group
- Maurice Wren, Chief Executive, Refugee Council



Rules of Engagement

- Respect confidentiality & privacy
- No solicitation or pitches
- Keep an open mind
- Honour others wherever they are on their journey

J Leon Group

Family Office charity models March 2017


J Leon Group

About J Leon Investment Approach Property Charities Team Location Member Login

J. Leon is a fourth generation family office based in Hampstead, London. The group's principal asset class is UK commercial property.

We are a diversified group, investing in property, equities and other UCITS compliant investments through a quoted authorised unit trust. The group also runs a portfolio of single manager hedge funds, a selection of direct private equity investments and, as a limited partner, J. Leon invests in more than fifty private equity funds and fund of funds. The group only invests from its own balance sheet and does not administer any third party funds. The group is ungeared.

Please note: the group does not consider unsolicited investment proposals.



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Charities

The J Leon Group manages its charitable activities through its Philanthropy Council, which focuses on two areas:

- Supporting the most vulnerable and marginalised people in society, and ensuring that people live free from violence, persecution and abuse.
- Providing opportunities for disadvantaged young people in the UK to fulfil their potential.

J Leon makes grants to a range of charities within these target areas, to service providers as well as to organisations which carry out research and seek to influence public policy and opinion.

Please note: unsolicited applications for funding will NOT be considered. All grants are made following an unvarying process of referral and research.



Leon model

- In-house ownership
- ‘Selfish giving’...
- Use of external benchmarking and agency
- No unsolicited approaches
- 3 year unrestricted giving programmes
- Risk profile, very narrow focus
- Limit grantor burden...
- Inflexion point
- Management, management, management
- JLPC added value
- Governance
- Ad hoc projects and Voucher system...



Focused areas, one process....

- NEETS
- Criminal Justice
- Mental health
- Human Rights including social inclusion, **migration** and Weapons' reach
- Environment

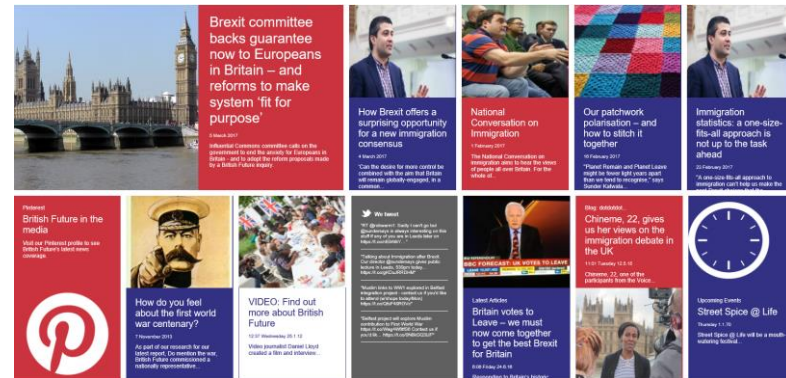
Engagement
Champion on JLPC
Visit process
Tardiness...
More than cash
Other families' involvement
Monitoring
Three year programmes
Unrestricted giving
Core/satellite approach



Migration and social inclusion

**British
Future...**

IDENTITY • INTEGRATION • MIGRATION • OPPORTUNITY



For a modern,
inclusive Britain

Campaigns

Right to Remain

HOPE not hate is demanding that the candidates for leadership of the Conservative Party make clear and unequivocal statement that EU migrants currently living in the UK are welcome to stay here. Please add your name. [Click here](#)

#MoreInCommon

Over the next few weeks we will be holding dozens of #MoreInCommon meetings around the country to organise a campaign to bring our communities back together and to isolate the haters. Please sign up to a meeting near you. [Click here](#)

2016 radical right and populist right-wing parties election results

There are 1579 candidates from radical right and populist right-wing parties standing in May's local, Mayoral, Welsh Assembly and Scottish Parliamentary elections. For a full list [click here](#).



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