Philanthropy Impact

Changing Times

How to Meet Clients' Emerging Demands Providing Philanthropy and Social Investment Advice

Are you a Private Client, Wealth Management, IFA, Tax, or Legal Adviser?

Reserve your place now on our CPD accredited training course

Providing Philanthropy and Social Investment Advice

A COMPREHENSIVE SKILLS-BASED TRAINING COURSE

The *Research*

- Philanthropy Impact's evidence-based research demonstrates that 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.
  - Increased opportunities to support succession planning and engage with the millennial generation – the most active group in philanthropy and social investment.
  - Bring more depth to the client/adviser relationship.
  - The shifting values of next gen and women of wealth is creating the need for a new kind of wealth management: greater engagement.
- According to Scorpio Partnership Research one third of people interviewed said that they would like their adviser to better support their charitable activity.
- The Charities Aid Foundation polled 1000 wealthy individual donors – 66% of those surveyed felt professional advisers could and should give them philanthropy advice.

This course has been designed by Philanthropy Impact specifically for you and will teach you to better:

- ***Understand*** how to meet and recognise your clients' demands for philanthropic and social investment advice in these changing times.
- ***Learn*** how to respond to your clients' demands for support on their philanthropic and social investment journey.
- ***Lead*** your HNW and UHNW clients to better address their values-based economic and social goals.
- ***Support*** your HNW and UHNW clients better by providing a comprehensive and personalised approach to investment with the benefit of our evidence-based research.
- ***Develop*** opportunities for you and your firm. Guiding clients on philanthropic giving and impact investing is good for the advisor's bottom line. It results in higher client satisfaction and raised retention rates.

The Course *content*

"Humans are neither binary or rational; informed only by risk and return and at all times logical. Passions play a huge part in how we behave. Wealth and investment is also changing – we are entering a new paradigm where it is seen as a powerful tool to affect sustained and positive social change. Advisors need to embrace this and evolve to stay with the market and their clients".

AMY CLARKE Co-Founder
Tribe Impact Capital LLP

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 intensive training course, advisers will develop their philanthropy and social impact investment knowledge, plus gain practical skills to better support their clients' expectations and needs.

Learning areas

- Understanding the market need and trends, and the business case for providing support to their clients on their philanthropic and social investment journey – the commercial proposition.
- Gaining insight about the need for philanthropy and social impact investment services and how this has affected the wealth management industry.
- Acquiring the knowledge, skills and tools to leverage best practice and become a leading player in this field including:
  - Global and UK giving – the trends
  - Why wealthy individuals get involved with philanthropy and social impact investments
  - Why it's important for wealth advisers to understand this activity
  - Service requirements (23 services) of (U)HNWIs on their philanthropic journey.
- Seeing how this opens the door to improve client engagement, enhancing reputation and create new business opportunities
  - Benefits and challenges advisers will face/ addressing myths
  - Strategic options
  - What advisers are expected to provide and how they can do this
  - Next steps and tips to establish or enhance your current services.

Toolkit: each attendee will be provided with a comprehensive toolkit.

Bespoke *Group Training*

Exclusive bespoke group training workshops are available by arrangement at the adviser's workplace.

Find out *more*

Please call our team on: **+44 (0) 20 7407 7879**
or email us at: **info@philanthropy-impact.org**
Discounts are available for Philanthropy Impact members.