TRAINING COURSE

This course has been developed specifically for Professional Advisors

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

CHANGING TIMES: Meet the Client Demand For Philanthropy and Social Investment Advice

11th July 2022 | 9:00am BST

TRAINERS: **John Pepin,** *CEO, Philanthropy Impact*
Heiko Specking, *Founder, specking+partners*

SPEAKER: **TBC**

CPD: 3 CPD certified points

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT — ENDORSED CPD

The shifting values of next generation investors are driving a greater need for a new kind of wealth management. They want more and better philanthropy advice and guidance from their advisors – but the professional advice community receives low ratings for this aspect of their service (average 5.9 out of 10). This training course focuses on what a 10 out of 10 rating should look like and prepares you to deliver this new and important part of your service.

WHY ATTEND:

- Bring greater depth to your relationships by displaying your *commitment* to support clients on the causes they care about
- Become a *confident practitioner* in the field of philanthropy
- *Understand* how philanthropy can be incorporated into your advisory practice
- Help your clients live their *values* and achieve their *goals*
- Acquire the knowledge, skills, and tools to leverage best practice and become a *pioneer* in this emerging field
- Receive *3 CPD points* and a free copy of the Philanthropy Impact *online handbook*–your go-to resource for delivering an effective philanthropy advice service and a follow up 1-hour consultation with Philanthropy Impact.

Summer Sale

Philanthropy Impact is pleased to extend a **HUGE** summer discount of **33%** to all that attend our upcoming summer training session. **For non-member participants the price is currently £300. Whilst members can receive further discounts.**

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register for this online certified CPD training course please click here or send an email to brighton.mazwi@philanthropy-impact.org

COST: £300

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT, CISI AND PIMFA members.

Cancellations received in writing 5 working days prior to the event will receive a full refund. It is regretted that cancellations made after this time will not receive a refund.

CPD CERTIFIED The CPD Certification Service

KEY LEARNING OUTCOMES

By attending this innovative online workshop, you will:

- Gain an understanding of the *commercial opportunity* that lies ahead
- Develop your philanthropy and social impact investment *knowledge*
- Learn practical skills to *better support* your clients' expectations and needs

This course is intended for professional advisors such as: private client advisors, wealth management, private banking, financial advisors, tax and legal sectors