



ONLINE EVENT

Community Investment Tax Relief (CITR): exploring opportunities for impact investors and professional advisors

12 MAY 2021 | 4:00pm GMT

FORMAT: Webinar

CHAIR: **Rennie Hoare**, *Partner and Head of Philanthropy, C. Hoare & Co.*

PANEL: **James Broderick**, *Director, Impact Investing Institute*; **Steve Deakin**, *CEO, BCRS Business Loans*; **Rosemary Macdonald**, *CEO, UK Community Foundations*; **Dominic Wade**, *Chief Financial Officer, Unity Trust Bank plc.*

CPD: 60 minutes (1 self-certified CPD point)

In collaboration with



Are professional advisors to (U) HNWI prepared for the various forms of social impact investing? What more can be done to harness the investment opportunities available? How can this help your clients to live their values and achieve their ambitions?

The Community Investment Tax Relief (CITR) is a tax incentive that encourages investment in under-served communities by giving tax relief to corporate and individual investors who invest in accredited CDFIs. In turn, CDFIs make loans to enterprises that operate within or for disadvantaged communities. Over the past five years the UK's CDFIs have lent over £1 billion to almost 40,000 borrowers to help create, sustain and grow enterprise in the UK. Like Social Investment Tax Relief (SITR), CITR could be extremely attractive for investors and advisors, and represent a new tool in enabling the sector to raise finance to correct the market failure in SME and social enterprise access to finance.

Join us to learn more and explore new trends towards responsible investment.

TOPICS TO BE COVERED INCLUDE:

- ESGs and SDGs and their role in creating real impact
- The role of wealth managers and intermediaries
- Current market trends and emerging client needs related to impact investing

REGISTER BY 10 MAY 2021

Register online at www.philanthropy-impact.org

This event is free for Philanthropy Impact members. Fee for non-members: £30 not-for-profit organisations/ £40 for-profit.

Prior registration is required. Following registration, registrants will receive an email containing instructions for joining the webinar.

Attendees will have the opportunity to ask live questions of the speakers during the web-event.

Our mission: To grow modern philanthropy and social investment, and encourage impact investing by developing the relevant skills and knowledge of professional advisors to (U)HNWI'