ROUNDTABLE

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Technology: Its Impact on Professional Advisors and Their Clients

The future use of technology in advisor-client relations, philanthropic giving and impact/ESG investing

15 MARCH 2022 | 17:00 for 17:30

This event is generously hosted by

C. Hoare & Co.
PRIVATE BANKERS SINCE 1672

FORMAT: Roundtable

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

PANEL: ***Frank Tobé** Impact Investor and Co-Founder, Supernova; **James Pereira-Stubbs**, Chief Client Officer, Oxford Risk; **Troels Steenstrup,** Director, Head of Machine Learning and Quantum Technologies Advisory*

CPD: 90 minutes (1.5 self-certified CPD point)

BACKGROUND

Digital technology is going to be a game changer to the bespoke professional advisor-client relationship. As advisory firms, philanthropists and impact/ESG investors embrace digital, there will be an increasing number of innovative tools and platforms playing in this space.

It will result in stronger advisor-client relationships as advisors help their clients live their values, fulfil their motivations, and achieve their ambitions and goals.

During this fascinating event, panellists will discuss how technology might be used to support the role of professional advisors in meeting their evolving needs whilst enabling philanthropists and impact/ESG investors to connect to societal and environmental issues they wish to address. Resulting in making charitable giving and impact/ESG easier and more effective.

The discussion may also include some of the key impact/challenges and issues on existing platforms, the latter including due diligence, issues related to data management, accessibility, and transparency.

TOPICS TO BE COVERED INCLUDE:

- Current and potentially applicable potential technology innovations
- The use of technology to measure sustainability and impact
- The use of quantum computing to tackle societal issues whilst adding value to the professional advisor-client relationship and outcomes

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SPEAKERS' BIOS

RENNIE HOARE

Rennie joined the bank in 2016 and was invited to join the partnership in 2018. The seven partners are 11th and 12th generation descendant of the bank's founder, own 100% of the bank and carry unlimited liability. Rennie is also head of philanthropy and has oversight of the bank's trustee services. This includes the bank's donor advised fund (DAF), the Master Charitable Trust. Prior to this, he worked in asset management at T. Rowe Price, Threadneedle and Guinness Asset Management. He graduated from the University of York with a BA Hons in Politics and holds the Investment Management Certificate.

Rennie is the Chair of Philanthropy Impact and a trustee of the David Nott Foundation.

FRANK TOBE'

Frank Tobé is a family office advisor, philanthropist and impact investor. He is a board member of DOB Equity, which has become a leading impact investor in the Eastern African region, and co-founded and served on the board of DOB Ecology, his family's conservation fund. He is also a founding member of the Shape the Future Summit in London, an independent gathering for (U)HNW millennial investors.

He is based in London.

JAMES PEREIRA-STUBBS

James is the Chief Client Officer at Oxford Risk. A B-B behavioural finance software and consulting firm helping investors make the best possible financial decisions over the lifetimes. Prior to joining Oxford Risk, James held various leadership positions at Deutsche Wealth Management and UBS Global Wealth Management.

TROELS STEENSTRUP

Troels is Head of Machine Learning and Quantum Technologies at KPMG Denmark and head of KPMG's Global Quantum Hub. He has a PhD in theoretical quantum mathematics and works at the intersection of mathematics, statistics, physics, computer science and business. He has been working with Machine Learning for more than 10 years and with Quantum Technologies for more than 4 years. Troels has a deep passion for technology and for bringing theory to practice - seeing technology solutions come to life at clients is a main driver for him. . He combines a strong theoretical foundation with business understanding and pragmatic solution design to create value for clients.