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

17th January 2023 | 9:00am BST

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

SPEAKER: **TBC**

CPD: 3 CPD 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 *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.

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

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: £450

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT, PIMFA AND CISI 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

Our mission: To increase the flow of capital for good by enabling private clients and their families to match their purpose driven wealth strategies with their values, capturing their sustainable, social and impact investment and philanthropy preferences across the spectrum of capital

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

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