ROUNDTABLE

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Does wealth advice require a radical re-think?
How Can Professional Advisors Best Serve Progressive (U)HNW Wealth Holders?

18 January 2023 | 17:00 for 17:30

This event is generously hosted by

BDB PITMANS

FORMAT: Roundtable

CHAIR: ***Jonathan Brinsden,*** *Partner, BDB Pitmans*

PANEL:
Stephanie Brobbey*, founder and CEO, Good Ancestor Movement*
Sherry Coutu CBE*, non-executive Director of Pearson plc, Workfinder, and Raspberry Pi*
James von Simson*, Partner, Evelyn Partners*
Dylan Samuel*, Senior Relationship Manager, Lombard Odier*

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

BACKGROUND

Digital The world is changing and with it the needs and expectations of wealth holders. Women of wealth, millennials and GEN Z wealth holders are seeking to align their wealth with their values and ambitions across all aspects from wealth planning, structuring, tax, family business advisory and succession; their conversations with their private client advisors revolving around this and their ESG/impact investing and philanthropic giving.

The needs and expectations of wealth holders continue to evolve and the traditional way of advising wealth holders may no longer be fit for purpose.

At the event, we will be asking if the professional advisory industry is falling short of the expectations of these emerging wealth holders and discuss how professional advisers to (U)NHWI can strengthen their values-focused offering leading to client retention, differentiation supporting business development, talent attraction and retention, and compliance. Barriers to meeting client expectations will be addressed.

Key sustainability issues of interest to this growing movement of wealth holders who are looking for advisory support to bring progressive values and opportunities to them will be addressed.

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SPEAKERS' BIOS

Jonathan Brinsden – CHAIR

Jonathan is individually ranked as a Band 1 charities lawyer in Chambers and Partners 2019 ('excellent, thoughtful and proactive, and delightful to deal with', 'his pragmatism is what singles him out'). He is also recommended in the Legal 500 directory as someone who 'fully understands the most complex matters yet can explain them with great simplicity and clarity'.

Jonathan advises a large number of charities which operate internationally and has helped them to develop their governance and commercial arrangements. He has advised international ultrahigh net worth individuals in developing their philanthropy, including assisting them with jurisdictional analysis for their charitable vehicles. Jonathan sits on the boards of several large foundations which operate exclusively overseas. He is the first point of contact for many charity chief executives and offers a wide range of advice on day–to–day issues such as grant-making, fundraising and other regulatory issues relating to their activities.

Stephanie Brobbey

Stephanie qualified as a private wealth lawyer in 2011 and practised at a City firm for a decade, advising a variety of domestic and international clients on a broad range of matters concerning their private wealth. Stephanie gained an outstanding reputation in the private wealth industry and was named one of eprivateclient's Top 35 Under 35 in 2020 and 2018. She was also listed as a Rising Star in the tax and trust category of the Spear's indices 2019 and was named in the Spear's 500 as a recommended tax and trust lawyer in 2020. Shortly before leaving private practice, Stephanie was ranked as an "Associate to Watch" in Chambers & Partners High Net Worth Guide 2021.
In September 2021, Stephanie launched the Good Ancestor Movement, a social purpose business which exists to disrupt the mainstream wealth advisory industry by challenging ideas around excessive wealth accumulation and tax minimisation. The Good Ancestor Movement supports wealthy individuals, families and charitable foundations with radical, more progressive wealth stewardship, and reparative and regenerative redistribution.

Stephanie is a dedicated social sector leader and has served as a trustee of youth charities FAST London and e:merge, and also The Funding Network. She is currently on the advisory group for Make My Money Matter, a new people-powered campaign, co-founded by Richard Curtis, which is working to shift the £3 trillion in UK pensions into sustainable investments.

Sherry Coutu CBE

Sherry has founded & funded several organisations that have floated on both US& UK stock markets, angel-invested in more than 70 companies and is an LP in 5 venture capital firms. Sherry has decades of experience in the private, Government and FTSE 100 sector and has had the privilege of chairing, as well as acting as Senior Independent Director, Chairing Remuneration Committees, Nomination Committees and serving on audit committees.
Currently, Sherry is a non-executive Director of Pearson plc, Workfinder, and Raspberry Pi. Philanthropically, Sherry supports F4S, The Scaleup Institute, SVC2UK, Digital Boost, and National Numeracy. She was appointed Commander of the Order of the British Empire (CBE) for services to entrepreneurship in the New Year's Honours List 2013 and she was commissioned by the UK Government in 2014 to author the Scaleup Report on UK Economic Growth.

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James von Simson

James is Director at Evelyn Partners (formerly Tilney Smith & Williamson), where he advises clients on their investments, governance and philanthropic activities. He specialises in looking after multi-generational and multi-jurisdictional wealth. Having started his career in 2005 as part of the M&A team at Citigroup in Frankfurt, James joined TS&W in 2016, as part of the acquisition of Thurleigh where he was a Senior Portfolio Manager. He is a Chartered Fellow (Chartered FCSI) of the Chartered Institute for Securities and Investment (CISI) as well as a Member (TEP) of Society of Trusts & Estate Practitioners (STEP) having completed the Diploma in International Trust Management. In 2019 he became the first UK Investment Manager to complete the STEP Professional Postgraduate Diploma in Private Wealth Advising (PPgD) in conjuncture with Alliance Manchester Business School. James sits on both the STEP Worldwide Council and the CISI International Committee. He is also an Ambassador for The Diversity Project.

Dylan Samuel

Dylan Samuel joined Lombard Odier in December 2016 as an Executive Vice President. Dylan advises a client base of entrepreneurs, financial professionals and family offices. Prior to joining Lombard Odier, Dylan spent 15 years at J.P.Morgan Private Bank. Dylan worked in both the Geneva and London offices for J.P.Morgan and in his last role headed a team of five relationship managers focusing on UK financial professionals and family offices.
Dylan holds a Masters in Mechanical Engineering (MEng) from the University of Bath. He also holds the Investment Management Certificate (IMC). Dylan is a Chartered Fellow of the Securities and Investment Institute (CISI). Outside the office Dylan enjoys spending time with his young family and sports.