NETWORKING EVENT

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

Meeting Changing Client Expectations

Future Proofing Firms with a values-based approach across the Spectrum of Capital

11 October 2022 | 17:00 BST

This event is generously hosted by

Brown ADVISORY
Thoughtful Investing.

Venue: 1st Floor, 18 Hanover Square, London W1S 1JY

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

PANEL: ***Jack Williams-Ellis***, *Senior Business Development Manager, Vertical Future*
Ida Levine, *Director, Impact Investment Institute,*
Carey Buxton, *Head of Sustainable Investing Business, Brown Advisory*
Oliver Scutt, *Senior Associate, Bates Wells*

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

There is a new generation of client base, rapidly growing through with the Great Wealth Transfer, driven by millennials, Gen Z and women of wealth (but not exclusive to), these clients are demanding a different kind of service from their wealth stewards.

This new thinking is having an influence throughout the global economy, with financial regulatory bodies recognising the need for the financial services sector to change their approach to these clients (e.g., the new Consumer Duty regulations). This is posing a complex problem for many Financial Institutions, particularly those with a large and long-standing traditional client base, often of a certain 'boomer' generation. How can they future proof their firms, whilst also meeting the needs and expectations of their traditional client base?

In this discussion we will explore the global trends we are seeing, the impact of the new regulations on customer relationships and how discussing values, ambitions, goals and motivations for wealth in the context of the spectrum of capital can bring solutions that many firms are seeking for their clients.

Followed by a chance to network with peers.

TOPICS TO BE COVERED INCLUDE:

- Global trends driven by the Great Wealth Transfer
- Impact of FCA Consumer Duty and MiFiD II Suitability on firms and what it means
- Sustainable and purpose centred wealth planning across the Spectrum of Capital
- The values, motivations and goals of Millennials, Women of Wealth and Gen Z (U)HNW clients

REGISTER BY 10 October 2022
Register online at here
https://www.philanthropy-impact.org/events

FEES:
This event is free for Philanthropy Impact members
Non-members: £80
Non-members (non-profit): £60

Prior registration is required.

Registration: 17.00 – 17.30 BST
Panel discussion: 17.30-19.00 BST
Networking reception 19.00-20.00 BST