CHANGING TIMES: Meet the Client Demand For Philanthropy and Social Investment Advice

25th October 2022 | 14:00pm BST

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

CPD: 3 CPD Certified points

In partnership with:

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 teaches you a service that will improve your client's financial well-being by helping them become happier and more fulfilled.

BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To register for this online CPD Certified training course please **click here.**

Alternatively for more information contact Brighton Mazwi at:
brighton.mazwi@philanthropy-impact.org

COST: £450

DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT, CISI, PIMFA and IFW 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

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
- *Learn* amongst like minded individuals in an interactive, idea driven environment
- 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 *3 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

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