TRAINING COURSE

Philanthropy Impact
Inspiring Philanthropy and Investing for Impact

This course has been developed specifically for Professional Advisors

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

The world is changing, and the professional advice industry must change with it.

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 THIS COURSE?

- 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

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

Current average rating for philanthropy advice:

5.9/10

This course could help you achieve a rating of:

10/10

BOOK NOW TO OPEN THE DOOR TO NEW BUSINESS OPPORTUNITIES, IMPROVED CLIENT ENGAGEMENT, AND ENHANCED REPUTATION

We also offer bespoke in-house training solutions, which are designed to help you respond quickly and effectively to the rapidly changing needs of your clients. Please contact:
zofia.sochanik@philanthropy-impact.org

CPD CERTIFIED
The CPD Certification Service

LEARN WITH PHILANTHROPY IMPACT

Philanthropy Impact focuseS on inspiring philanthropy and impact investing. Our mission is to grow modern philanthropy and social investment and encourage impact investing by developing the relevant skills and knowledge of professional advisors to ultra high net worth individuals.

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