



TRAINING COURSE

This is a course developed specially for major donor fundraisers

TRANSFORMATIVE FUNDRAISING

Preparing Fundraisers to work with Professional Advisors and for meaningful discussions with their clients on their donor journey

18.05.2021 | London | 9:00am GMT

TRAINERS: **John Pepin**, CEO, Philanthropy Impact
Sianne Haldane, Philanthropy Advisor

COURSE CONTENT:

This course, developed specifically for charity Major Donor and corporate fundraisers, aims to inform and educate those who work with (U)HNWI, to understand the role of their professional advisors (private client advisors, wealth management, private banking, independent financial advice, tax and legal sectors and family offices); and strengthen professional relationships that will transform their fundraising. With an emphasis on the use of business case language, the course will enhance communication focused on how to identify and meet the clients' needs.

This will be a highly interactive session, makes use of case studies on how fundraisers can address solutions to challenges in innovative and collaborative ways. The implications of CRUK and another charity's research will be discussed.

QUESTIONS FOR DISCUSSION:

- What can fundraisers learn from advisors to change the way they view wealthy donors and philanthropy?
- Who are professional advisors and what motivates them? How can you as a fundraiser work together with them to help meet their client needs?
- What is the spectrum of advisors and what are their roles?
- What internal and external challenges do fundraisers face in this process?
- How can we make the fundraising sector more innovative and a space for collaboration and not only competition?

REGISTER BY 15 MAY (LIMITED TO 12 FUNDRAISERS)

Register by sending an email to:
Victoria.shaw@philanthropy-impact.org

COST: £315

DISCOUNT FOR PHILANTHROPY IMPACT PARTNERS

Fee for Philanthropy Impact Members: £280.

Members of the Chartered Institute of Fundraising fee will be discounted to £280.

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.

DATE: Tuesday, 18 May 2021, 9:00am GMT

TIMINGS: Registration, 8:55; training starts at 09:00, ending at 12:00

VENUE: Online session

CPD: 180 minutes (3 hours) self-certified CPD points

Our mission: To grow modern philanthropy and social investment, and encourage impact investing by developing the relevant skills and knowledge of professional advisors to (U)HNWI'