

Afternoon Briefing

Wealth Management & Private Banking Philanthropy Briefing

BEYOND THE ADVICE GAP: STRENGTHENING EVERY LINK IN THE PHILANTHROPY CHAIN

Tuesday 15th September, 08.00-10.00, RBC Brewin Dolphin Offices, 100 Bishopsgate, London, EC2N 4AA

1600-1610	WELCOME Introducing the purpose of the session and setting the scene regarding the philanthropy landscape is evolving, including client demand, the wider impact economy and what has changed since our last briefing. <i>Chair: Dave Mason, Managing Director at Solve Partners and James Goad, CEO at Owen James</i>
1610-1645	ARE CHARITIES BEING LEFT BEHIND IN MODERN PHILANTHROPY? A discussion exploring whether charities are equipped to engage with today's donors and advisers, including topics such as share gifting, DAFs, stewardship and working more effectively with professional advisers. The focus will be on identifying where capability gaps exist and how greater collaboration could unlock more giving. <i>Speaker: Sarah Pook, Head of Business Development - Charities & Philanthropy at RBC Brewin Dolphin Limited</i>
1645-1720	FROM TRANSACTION TO TRUSTED PARTNERSHIP: WHAT DOES EXCELLENT PHILANTHROPY ADVICE LOOK LIKE? Building on the first discussion, this session will turn to wealth managers, exploring how firms are developing market-leading philanthropy propositions, building adviser capability and creating more meaningful client conversations. <i>With Lena Vogel, Social Impact Principal and Cath Dovey, Head of Philanthropy at NPC</i>
1720-1755	BUILDING THE PHILANTHROPY ECOSYSTEM: HOW DO WE CREATE STRONGER PARTNERSHIPS BETWEEN ADVISERS, CHARITIES AND CLIENTS? This concluding discussion will focus on collaboration across the ecosystem, looking at referral pathways, education, stewardship and practical ways to strengthen relationships between wealth managers, charities and professional advisers to increase philanthropic impact. <i>Speaker TBC at Barclays Wealth</i>
1755-1800	Wrap up - <i>Chair: Dave Mason, Managing Director at Solve Partners</i>
1800-1930	Networking drinks – A chance to catch up with old and new friends over a glass

What is the context of the Briefing?

Alongside the success of Owen James' series of strategic breakfast briefings for CEOs, COOs, CFOs, CIOs, Heads of HR and Heads of Financial Planning from the largest private banks and wealth managers, Owen James and EY recognised that there was an interest in creating a similar platform which brings together Business Heads, Heads of Philanthropy and Heads of Portfolio Management for regular updates and discussions on issues relating to philanthropy and how we can deliver more effective solutions for clients around social impact and philanthropy.

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Wealth Managers & Private Banks:

- **Advanta Wealth Ltd** - Chief Revenue Officer
- **Barclays Wealth & Investment Management UK** - Managing Director, Head of Charities and Investment Consultants
- **C Hoare & Co** - Head of The Master Charitable Trust
- **C Hoare & Co** - Philanthropy Manager
- **EQ Investors Limited** - Joint Chief Executive Officer
- **EQ Investors Limited** - Head of Sustainable Investment Management
- **Goldman Sachs Wealth Management** - Executive Director
- **I.G. Advisors** - Philanthropy Advisor
- **Independent**
- **J.P. Morgan Private Bank** - Executive Director, Head of The Philanthropy Centre International
- **Julius Baer International Ltd** - Director, Wealth Planner
- **RBC Brewin Dolphin Limited** - Head of Charities
- **RBC Brewin Dolphin Limited** - Head of Business Development - Charities & Philanthropy
- **RBC Wealth Management** - MD, Social Capital & Impact, ESC Group
- **Russell Cooke, Partner** - Charity and Philanthropy Law

Speakers, Experts and Organisers:

- **RBC Brewin Dolphin Limited** – Sarah Pook, Head of Business Development - Charities & Philanthropy
- **NPC** - Lena Vogel, Social Impact Principal
- **NPC** - Cath Dovey, Head of Philanthropy
- **Solve** - Dave Mason, Managing Director
- **Owen James Group** - James Goad, Managing Director
- **Owen James Group** - Mark Davison, Relationship Manager, Wealth Management
- **Owen James Group** - Rebecca Leitch, Conference and Content Manager