

Wealth Management & Private Banking Philanthropy Briefing

REIGNITING PHILANTHROPY ACROSS THE WEALTH SPECTRUM: FROM THE DISENGAGED ELITE TO THE DIGITAL FIRST MASS MARKET

7th October 2025, Lloyds Private Banking, Nightingale House, 65 Curzon St, London W1J 8PE

1600-1605	Welcome - <i>Chair: Dave Mason, Managing Director at Solve Partners</i>
1605-1700	PURPOSE UNDER PRESSURE: REFRAMING GIVING, ESG AND IMPACT IN A POLARISED WORLD Political polarisation, cultural scepticism, and concerns around greenwashing have left many clients quietly disengaging from philanthropy, ESG, and impact investing. Though the appetite for purpose-led wealth use remains, the language around “doing good” has become loaded, and often avoided. This session will discuss: • How advisers can lead the conversation with confidence and clarity, helping clients navigate today’s toxic climate and reconnect with purposeful capital deployment - from charitable giving to ESG and impact strategies • How to reframe value-aligned approaches not as idealism, but as part of long-term planning, legacy, and resilience • How to use the Spectrum of Capital to map and guide client decisions across philanthropic, social and financial goals <i>Expert: Jamie Broderick, Board Member, Impact Investing Institute</i>
1700-1755	DEMOCRATISING PHILANTHROPY: DIGITISING THE GIVING JOURNEY ACROSS THE SPECTRUM OF CAPITAL Philanthropy has traditionally been the preserve of the ultra-high-net-worth - a space dominated by family foundations, endowments, and high-profile legacy giving. But today, new generations of wealth holders are challenging that model, seeking more accessible, agile, and purpose-driven ways to give. At the same time, advances in digital platforms, data transparency, and impact measurement are reshaping what’s possible across the spectrum of capital. Lloyds will kindly share some of their latest innovations in this roundtable in order to explore: • How private banks and wealth managers can play a pivotal role in democratising philanthropy, enabling clients at all levels of wealth to engage meaningfully in charitable giving, social investment, and blended finance • How to digitise the giving journey, embed purpose into portfolio conversations, and make philanthropy more inclusive, measurable, and aligned with clients’ personal values? From donor-advised funds to tech-enabled impact platforms, participants will share innovations, challenges, and strategies to move from legacy giving to living impact. <i>Expert: Jonathan Norbury, Head of Key Clients and Lloyds Banking Group</i>
1755-1800	Wrap up - <i>Chair: Dave Mason, Managing Director at Solve Partners</i>

Afternoon Briefing

1800-1930	Networking drinks – A chance to catch up with old and new friends over a glass
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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.

Wealth Managers & Private Banks:

- **Citi Private Bank** - *Head of Wealth Planning*
- **Coutts & Co** - *Associate*
- **Goldman Sachs Asset Management** - *Executive Director*
- **I.G. Advisors** - *Philanthropy Advisor*
- **I.G. Advisors** - *Social Impact Associate Advisor*
- **Independent**
- **J.P. Morgan Private Bank** - *Philanthropy Advisor*
- **LCM FAMILY LIMITED** - *Philanthropy Advisor*
- **Lloyds Banking Foundation** - *Chief Executive*
- **Lombard Odier Investment Managers** - *Global Head of Philanthropy*
- **MASECO Private Wealth** - *Senior Wealth Manager*
- **MEUM Group** - *Co-Founder*
- **MEUM Group** - *Chief Executive Officer*
- **Moneycorp Bank Limited** - *Global Head Of Private Banking*
- **RBC Wealth Management International** - *Client Director*
- **RBC Brewin Dolphin Limited** - *Charities Business Development Manager*
- **Rothschild & Co** - *Global Project Manager*
- **Ruffer LLP** - *Director - Private Wealth*
- **Russell Cooke** - *Partner, Charity and Philanthropy Law*
- **Tribe Impact Capital LLP** - *Ines Uwiteto, Wealth Manager*

Afternoon Briefing

Speakers, Experts and Organisers:

- **Solve** – Dave Mason, *Managing Director*
- **Impact Investing Institute** - Jamie Broderick, *Board Member*
- **Lloyds Bank Private Banking Ltd** - Jonathan Norbury, *Director, Key Clients, Lloyds Private Banking*
- **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*