



THE BEACON PHILANTHROPY AND IMPACT FORUM 2026 GREAT HALL, CRYPTS, OLD LIBRARY AND PRINT ROOM, GUILDHALL YARD, LONDON

SCHEDULE OF THE DAY

Wednesday 11 February 2026 at The Guildhall, London

(Topics for Workshops & Roundtable Discussions can be found in the **Draft Agenda below**)

08:15 - Registration and welcome

09:00 - **Introduction:** With **James Goad**, Managing Director, Owen James Events

09:05 - **Welcome:** With **Jonathan Simmons**, Chief Executive, NPC

09:15 **Panel: Rising to the challenge** - chaired by **Neil Heslop OBE**, CAF and with panellists **Dame Julia Cleverdon DCVO CBE**, **Dame Caroline Mason**, Esmée Fairbairn Foundation, **David Holdsworth**, Charity Commission and **Kate Lee**, NCVO

10:00 - **Keynote with the Rt Hon Darren Jones MP**, Chancellor of the Duchy of Lancaster, Minister for Intergovernmental Relations and Chief Secretary to the Prime Minister

10:20 - Roundtables

Structured Networking

Workshops

Philanthropy Roundtable

11:20 - Refreshment Break

11:50 - Roundtables

Structured Networking

Workshops

Philanthropy Roundtable

12:50 - Buffet Lunch

13:45 - **Keynote: How family wealth-holders are driving the international impact agenda** - with **Sergio Fernández de Córdova**, Executive Chairman and Founder of PVB LIC Foundation

14:15 - **Panel: In conversation with some of the UK's leading modern philanthropists** - chaired by **Juliet Agnew**, Barclays Private Bank & Wealth Management and with panellists **Ben Goldsmith**, Menhaden PLC, **Becky Holmes**, Helvellyn Foundation and **Alex Chapman**, Reed Foundation and Ethiopaid

14:50 - Roundtables

Structured Networking

Workshops

Philanthropy Roundtable

15:50 - Refreshment Break

16:15 - **Keynote: Philanthropy that changes systems** - with **Julie Hutchison**, Director of Partnerships and Communications at LGT Venture Philanthropy and **Erik Spiro-Larrea**, Senior Project Lead, The Nature Conservancy (Nature for Water Programme)

16:45 - **Closing Remarks with Cath Dovey**, Philanthropy Partner at NPC

16:50 - Drinks Reception

18:00 - **Event Concludes** - if you wish to continue conversations, join us at City Arts Bar, Ironmonger Lane



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Event Overview

The Beacon Forum is the UK's largest and most influential impact economy gathering. It brings together more than 500 leaders across the impact economy, including government, philanthropy, wealth management, funding, investment, civil society, grant making and policy who are shaping the future of impactful giving, and social investment.

The day is shaped around keynotes, workshops and roundtable sessions, which are set out below.

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Keynotes

These podium speakers include government, leading philanthropists, social investors and impact pioneers whose work is actively shaping **the future of giving and social change** in the UK and globally.

They will set the scene for the day and shine a light on the trends, innovations and shifts defining the future of the impact economy.

- 1. Rising to the challenge** - What effective partnership between government, regulators and the impact economy should look like, and what it will take to build an environment where collaboration can drive meaningful national outcomes.
Chaired by Neil Heslop OBE, Chief Executive of the Charities Aid Foundation, with panellists Dame Julia Cleverdon; Dame Caroline Mason; Kate Lee OBE, Chief Executive Officer of NCVO and David Holdsworth, Chief Executive Officer of the Charity Commission
- 2. The Rt Hon Darren Jones MP**
Chancellor of the Duchy of Lancaster, Minister for Intergovernmental Relations and Chief Secretary to the Prime Minister
- 3. How family wealth-holders are driving the international impact agenda**
Sergio Fernández de Córdova, Executive Chairman and Founder of PVBLIC Foundation
- 4. In conversation with some of the UK's leading modern philanthropists** - Meeting pioneers who are shaping the future of philanthropy as structured, strategic and holistic.
Hosted by Juliet Agnew (Barclays Private Bank) with panellists including Ben Goldsmith, Chief Executive of Menhaden PLC, Environmental Investor and Philanthropist; Becky Holmes,

Trustee and Co-founder of the Helvellyn Foundation and Alex Chapman, Chair of the Reed Foundation and Chair of Ethiopiaid

5. **Philanthropy that changes systems** - It takes decades to change systems, especially when working across complex geographies. The LGT Venture Philanthropy Foundation will share its experience bringing together venture philanthropy with effective partnership to achieve on-the-ground impact.

Julie Hutchison, Director of Partnerships and Communications at LGT Venture Philanthropy and Erik Spiro-Larrea, Senior Project Lead, The Nature Conservancy (Nature for Water Programme)

Workshops

These sessions are learning opportunities, delivered and facilitated by prominent philanthropists, social investors, thought leaders and sector pioneers on **how we need to shape the impact economy** - covering leadership, legacy, and the evolving role of philanthropy.

1. Closing the gap: What are the best ways for wealth advisers and charities to connect?

The Modern Philanthropist report found that 81% of HNW individuals want their wealth advisers to raise philanthropy proactively, and 22% would like support to find organisations and causes to support. Yet there are structural reasons why many advisers cannot – and do not – make direct connections between clients and specific charities.

In this workshop, Barclays Private Bank and Wealth Management alongside the Chartered Institute of Fundraising will explore how wealth managers and the fundraising community can work together more effectively and share how they are building practical bridges from wealth advice to charitable donations, including:

- What are the main barriers that prevent advisers from connecting clients directly with charities?
- What models of collaboration are emerging between wealth managers and fundraisers?
- How can advisers introduce philanthropy confidently while remaining compliant and impartial?
- What do charities need to understand about the advisory environment to build better partnerships?

Experts: Juliet Agnew, Head of Philanthropy, and Isabelle Hayhoe, Senior Philanthropy Adviser, both of Barclays Private Bank and Wealth Management and Lucy Sargent, Director of Philanthropy and Events, WWF

2. Making the UK a hub for international philanthropy

How can the UK maintain and build on this reputation? In this session, CAF will be joined by experts to explore the motivations behind the money and consider how these trends could shape the UK as a hub for global philanthropy.

- Why do many non-profits and philanthropists select the UK as their jurisdiction of choice?
- How can the UK continue to be an attractive destination for philanthropy capital?
- What can the UK learn from places like Switzerland and Singapore?

- Do we need new structures and incentives to bring more inward philanthropy to the UK
- How can UK civil society benefit from greater incoming capital?

Experts: Led by Joe Crome, Head of Business Development and CAF American Donor Fund, Charities Aid Foundation, with panellists Heather Davenport, Senior Investment Partner – Deputy Director at Office for Investment; Augustus Della-Porta, Partner at Bates Wells; and Jennifer Emms, Head of Charities and Private Client Partner at Maurice Turnor Gardner

3. Collaborative funding: When is it the best option for donors and intermediaries?

Collaborative funds are an increasingly popular way for donors to pool resources, share risk and address complex issues at scale. But they also require donors and intermediaries to navigate questions of control, alignment and governance.

This session will share real-life experience of what it takes to collaborate successfully. The discussion will bring together funders and their advisers for a candid conversation about the challenges, risks and opportunities of co-funding, to address:

- How can donors and boards assess whether collaborative funds are the right option for them?
- What are the best entry points for funders and advisers looking to engage with existing collaboratives?
- What are the key benefits of co-funding, including reach, efficiency and influence?
- What do funders give up – and gain – when they choose to work with others?

Experts: Alejandro Álvarez von Gustedt, Rockefeller Foundation; Bridie Layden, END Fund; Sheetal Vyas, Virgin Unite and Nick Grono, Freedom Fund

4. The rise of transatlantic philanthropy

Recent policy shifts and political developments in the US have shaken the foundations of its philanthropy and non-profit sectors. These changes have important implications for cross-border giving, and for the role of international philanthropy centres in supporting stability and continuity.

This workshop will explore how developments in the US are reshaping the UK giving landscape. For fundraisers, this will consider how US foundations are restructuring their global giving, and what this means for UK organisations seeking to engage. For advisers and the wider philanthropy sector, this will examine how the UK can position itself as a global centre of excellence for philanthropy and impact.

- How have US foundations and donors adjusted their international giving strategies?
- What opportunities and risks do these shifts create for UK-based charities and social enterprises?
- What role can UK-based philanthropy organisations and advisers play in supporting cross-border giving?
- How can the UK strengthen its position as a trusted hub for global philanthropic and impact capital?

Experts: Matt Beem, Kinetic Fundraising; Jonathan Smith, Kinetic Fundraising; Matt Naylor, United States National WW1 Memorial and Sam Underwood, Forward Global

5. The UK's Better Futures Fund: Learn about the world's largest social outcomes payment fund

In July, the Government announced the £500m Better Futures Fund to support 200,000 vulnerable children across the UK. This funding is expected to be matched by other outcome payers, including local government, and is expected to enable outcomes payments worth up to £1bn over the next ten years. This fund is the largest of its kind globally, enabling collaboration between government, local communities, impact investors and philanthropies to harness impact capital and tackle one of the country's most urgent social challenges.

In this session, Better Society Capital will lead a panel of the key stakeholders involved in the design and delivery of the Better Futures Fund and outline how philanthropists, impact investors and businesses can engage in this transformative initiative, including:

- What is a social outcomes partnership, and how is the Better Futures Fund being structured to deliver on its national aims?
- What roles will be played by government, local government, and service delivery organisations?
- What is the role for philanthropists, impact investors, and how can they access this opportunity?
- What will success look like for all the partners in this exciting new venture?

Experts: James Westhead, Better Societies Capital; Davie Parks, The Skill Mill; Becky Morrison, Director for Civil Society, DCMS and Mila Lukic, Bridges Outcome Partnership

6. Impact UK: What is the impact economy and why is it important?

Across UK government, academia and civil society, conversation is turning to the impact economy. There is now an Office for the Impact Economy, the London School of Economics is hosting the Impact Economy Collective, and people are appreciating that this is a significant sector comparable in scale to manufacturing and retail.

The impact economy is not new, it has always been there, but it now feels time to recognise it and talk about it, so we can grow it. This session will share NPC's latest new research on the size and scale of the impact economy and explore how the UK can articulate a unified "impact story", one that strengthens legitimacy, unlocks investment and shapes policy development. Drawing on NPC's latest research, participants will examine:

- How big is the impact economy and what is included?
- How can shared data, common language and unified messaging raise the sector's influence?
- What do civil society, business, philanthropy and government each need to contribute?
- How could a stronger story shape regulation, investment and public engagement?

Experts: Chris Willis Pickup, Mishcon de Reya LLP; Erwin Hieltjes-Rigamonti and Emma Pearson, NPC

7. Accelerating innovation through the intersection of philanthropy and investment

Progressing discoveries from the laboratory to become tests, treatments and devices that benefit patients requires more than grant funding alone. Cancer Research Horizons combines deep scientific expertise with commercial and investment capability to maximise patient impact.

This workshop will explore the blend of philanthropy, seed funding and investment needed to move breakthroughs from bench to bedside, including:

- Why philanthropic support is essential as a bridge towards commercial investment and impact for patients
- Innovative opportunities for philanthropists and impact investors to engage and drive progress forward
- Exploring models which could potentially deliver new 'evergreen' funding sources for charities

Experts: Stephen Massey, Genghis Lloyd-Harris and Tanya Hughes, Cancer Research Horizons

8. The Impact Economy Collective: A pathway to partnership

Over the last 18 months, the Impact Economy Collective (IEC) has opened up new channels for philanthropy, impact investment and purpose-led business to connect with government around shared objectives. From the launch of the Office for the Impact Economy and the Social Impact Investment Advisory Group to policy labs focused on children and young people, left-behind communities and preventative health, the IEC is helping impact actors and public bodies to work together more effectively.

This interactive workshop will share what has worked so far and invite participants to shape the IEC's next phase. The session will explore the emerging structures within government that support impact, how frontline insight is being surfaced to inform the policy labs, and how impact activity is being aligned with the work of government departments, by asking:

- What is the Impact Economy Collective and how does it operate?
- How has the IEC supported engagement between the impact sector and government to date?
- What are policy labs and how do they work in practice?
- What structures are emerging within government to support the work of impact actors – and how do they help surface “win–wins”?
- What examples of effective impact–government collaboration are participants seeing in their own communities, and how could the IEC amplify them?

Expert: Dominic Llewellyn, Impact Economy Collective, with panellists from across the impact economy

Roundtable Themes

Interactive discussions, delivered and facilitated by prominent philanthropists, social investors, thought leaders and sector pioneers on **what we need to focus on next**, including impact measurement, next-generation giving, and aligning investments with purpose. All sessions will follow the Chatham House Rule.

The roundtables have been grouped into the following six categories, with titles linking to the full session description:

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For Philanthropists

1. Why aren't philanthropists getting the advice they need?

Levels of frustration are growing among wealth holders that they can't easily get the advice they want to support their social impact activity. At the same time, philanthropy advisers and many wealth advisers want to improve the quality and accessibility of the advice they offer, but they need more input on what is missing and how to deliver a good solution.

In this session, we are actively encouraging donors, philanthropists and impact investors to give their feedback on the advice they receive.

- What are your experiences trying to access advice about philanthropy and impact investing?
- How easy is it to find advisers who can centre their advice around your impact goals and your family's goals?
- What do advisers do well, and what don't they do well?

- How does philanthropy advice have to evolve to meet the needs of future philanthropists and impact investors?

Expert: Jonathan Simmons, Chief Executive, NPC

2. How government is working with philanthropy

This government has committed to working more closely with philanthropists, impact investors and the wider impact economy to develop a match-first or leverage approach to policy design. A number of government departments have already expressed interest in philanthropic match funding for the Better Futures Fund, Better Start in Life and Pride in Place.

The Department for Education is most advanced - and already engaging with philanthropies - to tackle systemic challenges such as social mobility, early years outcomes, school improvement and post-16 opportunities.

Yet many philanthropists remain unclear about how to engage effectively, where government genuinely needs partnership, and how to navigate risk and complexity. This session will explore:

- Where can philanthropists add the most value alongside statutory systems?
- What do the DfE's emerging priorities mean for funders and how can other kinds of philanthropic partnerships be established?
- How can we build partnerships that are constructive, evidence-led and transparent?
- How is government adapting to work more effectively with private and social capital?

Expert: Alex Hayes, Director, Philanthropy, NPC and Vicki Butler, Head of Policy and Public Affairs, Charities Aid Foundation

3. Managing reputational risks - for philanthropists

Philanthropists are operating in an increasingly complex and public sphere. Scrutiny of private wealth sources and funding decisions brings with it the need for philanthropists to be aware of reputational challenges, especially in the context of society's expectations. They also need to consider thoughtful and appropriate governance. At the same time, many funders recognise that their profile is an instrument of their philanthropy, which can support advocacy and campaigning - and drive impact.

This session will provide philanthropists with the opportunity to explore how they can use their voice responsibly and accountably in a world that is more open and more unfiltered.

- What are the reputational pressures and risks that philanthropists are navigating today?
- What forms of governance can build confidence, while also managing risk?
- How can philanthropists judge when visibility will increase impact (and when to fund quietly)?
- How can philanthropists prepare for moments of controversy and respond with authenticity?
- What is the right balance between bold action and responsible, values-driven risk management?

Expert: Zaki Cooper, Director and Co-Founder at Integra Group and facilitated by Sonal Patel, CEO, GMSP Foundation

Philanthropy Advice

4. What does good advice look like?

As philanthropy becomes more sophisticated, donors increasingly rely on advisers to navigate governance, impact, risk and regulatory complexity. But the quality of advice varies widely, and philanthropists often struggle to know what “good” looks like or how to evaluate the guidance they receive.

This session will discuss:

- The core components of high-quality philanthropy advice - from structuring to strategy to due diligence
- How advisers can help donors define values, clarify objectives and avoid common pitfalls
- The skills, experience and behaviours that distinguish excellent advisers
- How philanthropists can hold advisers accountable and ensure that advice remains aligned with mission and risk appetite

Expert: Emma Beeston, Philanthropy Adviser

5. Building total impact portfolios

One of the key findings from The Modern Philanthropist report is that high-net-worth wealth holders are now using a broader mix of structures and strategies to achieve the impact they want to see in the world. As they seek more input and support from their wealth advisers, there are technical and operational challenges in building truly comprehensive “Total Impact” portfolios across family and business wealth.

This session will draw on practical experience of designing and implementing Total Impact portfolios, looking at how to integrate philanthropy, impact investing and traditional allocations into a coherent strategy, to ask:

- What are the principal obstacles in designing a Total Impact approach for family and business wealth holders?
- How can advisers keep track of impact across multiple investments, structures and strategies?
- What does it take to provide a comprehensive, intelligible view of impact to clients?
- How does the wealth management sector need to evolve to meet growing Total Impact demand from high-net-worth clients?

Experts: Olivia Lewis, Director Barclays Private Bank, and Damian Payiatakis, Head of Sustainable and Impact Investing, Barclays

6. Countdown to 2027’s IHT and pension reforms

The inclusion of unused pensions within the scope of inheritance tax (IHT) from 2027 is prompting renewed interest in giving strategies among financial planners and families. Donors may now wish to divert more of their assets to philanthropy rather than pensions, especially as giving 10% of a net estate to charity reduces IHT from 40% to 36%.

This session will explore the rule changes and consider how advisers can help wealth holders integrate philanthropy into holistic family wealth strategies, including the use of flexible structures such as DAFs, by discussing:

- How upcoming IHT and pension reforms will change the landscape for family giving
- The tools and structures that are most effective for channelling excess pension assets into philanthropy
- How advisers are integrating giving into broader succession and estate planning conversations
- What practical considerations are there when using DAFs and other vehicles in this context

Expert: Anna Josse, Founder and CEO of Prism the Gift Fund

7. The rise of DAFs as a wealth management solution

As more wealth managers respond to growing client interest in philanthropy and impact, DAFs are emerging as a vehicle of choice. Offering tax advantages, ease of administration, retained investment management and the ability to support clients through a lifetime of giving, their appeal is clear. Yet in some markets, particularly the US, DAFs attract criticism.

This session will explore the flexible opportunities DAFs offer, how they can support best practice in giving, and where advisers need to be alert to potential downsides, by asking:

- What role can DAFs play in family wealth structuring?
- Why are they an effective choice for individual and family giving?
- How well do DAFs work for legacies and perpetual giving?
- How are DAFs being deployed in complex and strategic giving strategies?
- What do advisers need to know about the downside risks, particularly around transparency and payout ratios?
- How do DAFs compare with other giving vehicles in practice?

Expert: Rennie Hoare, Partner & Head of Philanthropy, Hoare & Co

8. How families give

As the great wealth transfer marches on, the subject of how families give has never been more relevant. For the upcoming generation, impact is an essential part of their identity, while the older generation often has well established and committed relationships to causes, organisations and impact activities. In this session, we want to hear from advisers and charities about the tools and techniques they are using to work effectively with family donors, by asking:

- How involved are spouses, children and grandchildren in major giving decisions?
- Are charities seeing more family or multi-generational gifts? If so, how do you bring the whole family into your donor community?
- Are advisers seeing more families giving together, or giving in parallel, with each family member adopting their own causes and issues?
- How are families structuring their giving to offer both flexibility and continuity?

- What techniques work best to make sure that families give together, even if they have different impact priorities?

Expert: Adriana Lowe, Senior Private Client Manager, Charities Aid Foundation

9. When do foundations work best?

Giving structures play a critical role in enabling strategic philanthropy and sustained impact. Foundations (charitable trusts) offer specific benefits at different giving levels and for different donor types.

This session will explore when foundations work best for HNW individuals, families, corporates and legacy givers, including:

- How different mechanisms enable strategic grantmaking, collaboration, lifetime and perpetual giving
- How foundation structures can be matched with donor goals, levels of giving and capacity
- The costs, constraints and benefits associated with different options
- How foundations can support the goals and objectives of a new generation of donors

Expert: Catherine Seymour, Director of Policy, Practice And Research, ACF

10. Implementing DAFs in wealth management

Research from NPT UK shows charitable assets under management in UK donor advised funds (DAFs) reached £2.8 billion in 2023. A growing number of wealth managers are considering launching DAFs for their HNW clients – but what does this mean in practice for advice, operations and reporting?

This session will demystify DAFs and explore what it takes to integrate them into a wealth proposition that supports clients across a lifetime of giving, by asking:

- Which types of clients benefit most from a DAF?
- What are the key advantages for wealth managers – and where are the pitfalls?
- What are the pros and cons of white-labelling versus working with a third-party provider?
- What changes are needed to the advice proposition to truly support charitable giving?
- How difficult is it to provide integrated reporting on charitable assets alongside investment portfolios?

Expert: National Philanthropic Trust UK

11. Advising global clients

Internationally mobile wealth holders are increasingly seeking to give across borders — supporting causes in their country of origin, backing global initiatives, or responding to geopolitical events. Yet cross-border philanthropy remains one of the most complex areas, requiring technical knowledge, trusted structures, and robust compliance.

This session will explore how advisers can confidently support clients with multi-jurisdictional giving, retain the client relationship, and meet rising expectations for seamless global philanthropy. Drawing on

international case studies and the growing demand for specialist giving vehicles and DAFs to enable international and family philanthropy, the discussion will focus on practical ways to navigate complexity while maximising impact.

- What internationally mobile clients expect from advisers when giving across borders
- How geopolitical, tax and regulatory shifts are reshaping cross-border philanthropy
- Structures that facilitate compliant, frictionless global giving — including when DAFs are, and aren't, the right tool
- How advisers can retain oversight of the client relationship while enabling international generosity
- Practical steps to manage risk, maintain credibility, and support long-term global giving strategies

Expert: Nancy Bikson, Managing Director, Chapel & York

12. Legacy giving: The adviser's role in securing long-term impact

Legacy giving remains one of the UK's most powerful - and underused - charitable tools. Professional advisers are uniquely placed to raise the topic, yet conversations often come too late or not at all. This session facilitates a discussion around how lawyers, accountants and wealth managers can integrate legacy giving and philanthropy into client discussions in a way that feels natural, ethical and aligned with personal values.

- Why legacy giving is becoming increasingly important for clients, families and charities
- The critical role advisers play in normalising conversations about gifts in wills
- Practical frameworks and prompts advisers can use to explore legacy intentions with clients
- How legacy giving and lifetime philanthropy can strengthen adviser–client relationships and support long-term planning across generations

Expert: Africa Chatleigh, Legacy Partnerships Manager, Cancer Research Horizons

13. Women, wealth and the future of philanthropy

The largest intergenerational wealth transfer in history is underway, with women set to control an unprecedented share of private wealth - yet philanthropic structures, advice models and funding norms have been slow to catch up.

This roundtable explores how women are reshaping philanthropy from different approaches to risk, collaboration and time horizons, to a stronger focus on systems change, lived experience and long-term outcomes. We will consider what this shift means for philanthropists themselves, for advisers supporting women as donors or decision-makers, and for charities seeking to build more effective, values-aligned funding relationships.

Key questions include:

- How are women approaching philanthropy differently, and where are those differences already reshaping funding practice?
- What does this mean for advisers supporting women as donors, trustees or inheritors of wealth?

- How can philanthropic vehicles, governance and advice models better reflect women's priorities and decision-making styles?
- What do charities need to understand to build more durable, trust-based relationships with women funders?
- How might this shift in who holds wealth influence collaboration, power-sharing and systems change over the next decade?

Experts: Louisa Macdonald, Philanthropy Advisor, JP Morgan Private Bank; Clare Wilkins, Independent Philanthropy Adviser and Caroline Underwood OBE, Philanthropy Adviser

14. Managing reputational risks

Philanthropists are operating in an increasingly complex and public sphere. Scrutiny of private wealth sources and funding decisions brings with it the need for philanthropists (as well as the non-profits they fund, and the advisers supporting them) to be aware of reputational challenges, especially in the context of society's expectations. They also need to consider thoughtful and appropriate governance. At the same time, many funders recognise that their profile is an instrument of their philanthropy, which can support advocacy and campaigning.

This session will help advisers, foundations and non-profits to consider how to support philanthropists to use their voice with impact and accountability in a world that is more open and more unfiltered.

- What are the reputational pressures and risks that philanthropists are navigating today?
- What advice and governance can build the confidence of philanthropists to talk about their work, while also managing risk?
- How can advisers and non-profits help philanthropists to judge when their profile will increase impact, and when anonymity will be more effective to achieve their impact goals?
- How should philanthropists, the charities they support and their advisers, prepare for moments of controversy and respond with authenticity?
- What is the right balance between bold action and responsible, values-driven risk management?

Expert: James Maloney, Farrer & Co

Impact Investment

15. Unlocking opportunity: The case for private markets impact investing

Challenging economic times have put impact investment strategies to the test over the last two years, underscoring the need for effective diversification. From a growing range of asset classes and thematic investments to blended models, the building blocks for diversified impact portfolios are expanding.

In this session, Better Society Capital will provide a whistle-stop tour of the current range of private market impact investment strategies available in the UK, share how a range of investors are putting private markets to work, and provide practical tips for newcomers and those looking to deepen diversify their exposure, including:

- What does the full suite of impact investment opportunities look like in 2025?

- How are a range of asset owners and managers implementing diversified portfolios?
- What should new investors keep in mind when approaching impact investment for the first time?
- Where is the best place to go for advice and support to make investment decisions?

Expert: Claire Kearney, Managing Director, Better Society Capital

16. Bringing philanthropy and impact investment to place: The impact economy in action

This session explores the Southampton Model, a culture-led, place-based impact investment initiative led by Southampton City Council and Southampton Forward. Supported by the Impact Investing Institute, Southampton has positioned cultural infrastructure at the heart of city strategies while building new partnerships with investors across the full spectrum of capital.

This open conversation will share what went well, where friction emerged, and the key lessons learned from building partnerships between private, public and philanthropic investors to deliver impact for people and place.

Experts: Mark Hall, Impact Investing Institute with Claire Whitaker, CEO - Southampton Forward and Stephen Haynes, Executive Director - Growth and Prosperity, Southampton City Council

17. Implementing a mission-aligned impact investment strategy when your mission is in a complex area

Building a portfolio of impact investments that complement philanthropic work in complex or highly targeted areas can be tough.

This session will explore how you can plan your impact investments creatively and strategically, even if your work is focused on challenging spaces such as place-based work and some single-goal oriented activity. We will hear from organisations that have successfully created an impact investing portfolio that contributes to (and furthers) their goals, even though they operate in niche fields

Experts: Sarah Teacher, Impact Investing Institute and Rebecca Garrod Waters, Ufi VocTech Trust

18. Social investment in the arts

Reduced public funding and shifting priorities in the grantmaking sector have left many arts and culture organisations facing significant funding gaps. While philanthropy is often cited as the sector's future, innovative models – including blended finance and social investment – are also gaining traction.

This session will explore what the wider impact economy can learn from social investment in the arts and culture sector, by asking:

- What examples illustrate the cutting edge of social investment in the arts?
- What obstacles did organisations and funders face initially, and how were these overcome?
- How does philanthropy fit into the wider funding mix alongside social investment and earned income?
- What experience can the arts sector share about supporting frontline organisations to embrace financial innovation?

- What long-term benefits are anticipated for individual organisations and the wider sector?
- Could lessons from the arts be applied to other sectors, themes or places?

Experts: Fran Sanderson, CEO and Frances Runacres, Trustee, Figurative

19. Social impact investment for charities and grantmakers: Finding the right strategy

Social investment is now firmly on the agenda for grantmakers and charities that are looking to amplify their impact beyond grants and grant income. Yet it remains an area where advice is limited. So, how do organisations find the right strategy for their mission, goals and risk appetite?

In this session, peers from ACF's social impact investment group will share their experience on how they brought their organisations with them as they made their first steps into mission-aligned investment.

- What are the benefits of social investment alongside traditional grantmaking?
- How do you build confidence from the board down?
- How do you build a strategy that is right for your organisation?
- What are the potential pitfalls and how can you manage those risks?
- When is professional advice needed - and where are the gaps?

Experts: Gemma Cartwright, Head of Investment Practice and Partnerships at ACF; Gail Cunnigham, Advisor, Better Society Capital; Sufina Ahmad, Director, John Ellerman Foundation and Nicola Mosley, Chief Operating Officer, Barnwood Trust

20. Is “good business” coming of age?

With DEI and sustainability strategies under increased scrutiny in some markets, there are questions about how “good business” is evolving in the UK. While many business leaders report that sustainability and social issues are rising in importance, cost pressures and demands for tangible impact are reshaping practice.

This session will consider how companies are refining their social impact strategies and what this means for the wider impact economy, including:

- How businesses are centring impact measurement to refine their social strategies?
- How closer scrutiny is shaping which issues and targets companies choose to take a public stance on
- The role social procurement can play in transferring commercial value to social enterprises
- How deeper partnerships and corporate volunteering models are evolving
- Who the current leaders in “good business” are, and how might their approaches reshape the relationship between business and the impact economy

Expert: Joanne Hay, Chief Executive, Social Business Trust

21. Impact investment at a crossroads

Economic headwinds, enhanced scrutiny, increasing regulatory costs and constrained distribution have combined to create a challenging environment for impact investment. At the same time, demand for demonstrable social and environmental impact continues to rise from asset owners, regulators and the public.

This roundtable will explore the opportunities and tensions in a maturing impact investment sector. Participants will discuss where impact investment is delivering on its promise, where it is under strain, and what changes are needed to sustain growth and credibility, including:

- How are current market conditions affecting impact investment demand and product development?
- What are the main barriers to scaling impact investment through mainstream wealth and asset management channels?
- How can the sector respond to increased scrutiny while retaining flexibility and innovation?
- What are the most promising strategies and structures for the next phase of impact investing?

Expert: Jamie Broderick, Deputy Chair, Impact Investing Institute

The Future of Philanthropy

22. Maximising impact: The evolution of modern giving

Philanthropy is evolving rapidly in the UK. Many donors, especially emerging philanthropists, are interested in exploring novel and ambitious ways to give. This includes identifying the bold ideas, new models, and partnerships that can drive systematic change. It also means identifying more efficient ways to give and manage the cost of impact.

In this session, we will explore what it takes to be on the cutting edge of change and how new models of giving, such as time-bound, thesis-driven funds, are maximising donor's bang for their buck.

- What does it take to surface breakthrough ideas locally, nationally or even globally?
- What are the hidden costs of giving, especially in niche and complex fields?
- What strategies can maximise impact and reduce the cost of giving?
- How can thesis-led, time-bound approaches to philanthropy drive faster, more impactful results?
- What are the implications of these new models of giving for donors, charities and the wider impact sector?

Expert: Christen Brandt, Director of Operations, Renaissance Philanthropy

23. The architecture of global giving: Strengthening the infrastructure of philanthropy

As philanthropy becomes increasingly global, the infrastructure that enables safe, compliant and effective cross-border giving is more important than ever. This session will unpack what infrastructure

really means in a global context - and how the UK's ecosystem of regulation, advisory expertise, and due diligence can be leveraged to unlock international capital for good.

Following a scene-setting overview of global giving infrastructure, the discussion will explore how the UK's philanthropic ecosystem can be better leveraged to attract international capital and support cross-border impact, by asking:

- How can charities and social-purpose organisations position themselves to attract international donors, including HNW individuals, family offices and institutional funders?
- What governance, registration and due diligence requirements are needed to fundraise and give across borders?
- Should international organisations pursue a formal registration with the Charity Commission, or work with a “fiscal host”?
- How can organisations extend their reach and relevance globally, including engaging with diaspora communities, ambassadors and trusted intermediaries?

Expert: Alexander Karaosmanoglu, Director, Global Impact UK

24. Harnessing AI tools and new approaches to turbocharge collaboration for impact

Many people working to build and scale impact sense that more is possible — but the collaboration and resources to make it real are scattered across sectors and rarely brought together. New tools and approaches offer a way through.

In this roundtable, Jens Molbak - founder of the \$2.7 billion Coinstar enterprise - will introduce a pragmatic approach to aligning the interests of public, private, and social sectors so that impact becomes structural, rather than dependent on grants or goodwill.

The session will explore Tri-Sector Innovation: a mindset, models, and free tools designed to align interests and access unrecognised and underused resources. Participants will use AI tools to unlock the value of assets and opportunities across the wider economy, and explore how to:

- Boost initiatives struggling to move beyond pilots;
- Align public, private, and social actors to genuinely contribute, not just convene;
- Find and release underused assets across sectors — people, data, infrastructure — to scale social impact; and
- Make tri-sector approaches the default way of building an impact economy.

Expert: Jens Molbak, Philanthropist and Founder of NewImpact.care

25. Using AI to maximise family philanthropy

Family philanthropists often seek to operate using minimal operational resources - thus increasing resources available for the causes they support. AI therefore offers the tantalising prospect of maximising efficiency and improving impact. This session will explore how family philanthropists can get the most out of applying AI to their family giving strategies.

- Navigating the complexity of issues, causes and systems

- Aiding selection and building relationships
- Spotting patterns and identifying risks
- Enabling grantees and minimising administration
- And still centring the "human" when it matters most

Expert: Sean Sinanan, Impact Lead, Plinth

Policy

26. Bringing the right impact strategies to placemaking

As place rises up the government's impact agenda, funders and investors are seeking tools to align their capital with local priorities. Yet many place-based strategies focus on urban centres, with less clarity on how to adapt models to different geographies and community needs.

This session will explore how impact strategies can be tailored to specific places, how funders can work with local partners to design interventions, and what it takes to ensure communities benefit in the long term, including:

- How can impact strategies be effectively aligned with local needs and assets?
- What can philanthropy do, and what can't it do?
- What models show promise for place-based impact in practice?
- How should funders approach risk, accountability and voice when working at place level?
- What are the implications for long-term community wealth building?

Expert: Saboohi Bukhari, Director of Place-Based Giving, London Funders

27. Making philanthropy coherent to government

This government has indicated an unprecedented willingness to work in partnership with philanthropists and impact investors. This new openness will require new ways of working. This session will explore how we can make sure there is a two-way street as partnerships start to form between philanthropists and government.

- How can philanthropists and impact investors connect with government to share their work and seek opportunities?
- What is the Philanthropists Reference Group and how is it facilitating engagement with government?
- What methods of engagement will build trust between philanthropists, impact investors and government?
- What actions are likely to undermine the potential for smooth partnership?

Experts: Rory Brooks, Co-Founder and Trustee of the Rory and Elizabeth Brooks Foundation and Tom Flude, Group Head of External Affairs, Charities Aid Foundation

28. Devolution and regional giving

The devolution agenda is a complex national project changing how decisions are made and funded in different parts of the UK. As powers and budgets shift, this session will explore the opportunities to reset how local authorities partner with civil society, regional philanthropy and impact investment, including:

- How devolution is changing the landscape for civil society, regional giving and impact investing
- What the opportunities are for local government to engage with civil society in places and build genuine partnership
- What fears on the ground are, as well as the risks of failing to make civil society a foundational partner in this national reset

Expert: Caroline Taylor, Chief Executive of Essex Community Foundation

29. Where can match funding take us in the future?

The government has committed to leveraging impact capital through match funding aligned with national priorities and missions. Match funding has the potential to draw in new donors, deepen engagement and increase overall giving – but it is not always straightforward to design and deliver.

In this session, experiences of match funding and how best to use it in the years ahead will be explored, including:

- When match funding works well, and what its limits are
- How different match funding mechanisms work and which donors they engage
- The main obstacles to more and better match funding
- How we can maximise the opportunity to leverage capital against priority issues and across the country

Expert: Alex Day, Managing Director of The Big Give

30. Building the narrative of the Impact Economy

Coming together under the umbrella of the "impact economy" has enabled charities, philanthropy, social investment, impact investment and responsible business to find a unified identity and common goals. Yet there is still much work to be done to build a shared narrative for the positive change being driven by impact activity across the UK.

This session will explore actions that will help the impact economy to tell its shared story:

- What has held us back historically from a shared narrative of impact?
- Why do we fall so easily into siloes, and find it so hard to find a common narrative?
- What are the advantages of a unified message and where will it help to take us?

Expert: Jonathan Simmons, Chief Executive, NPC

31. What would a dream Charity Register look like for donors and impact investors?

The Charity Commission manages the Charity Register of over 170,000 charities across England and Wales and makes this information available to the public. Philanthropists and advisers routinely use the register as a key source of information when researching which charities to support.

The Commission is committed to making its digital services more accessible, including bringing on stream new technologies. In parallel, the latest update to SORP means charities are expected to provide greater detail about their impact.

These changes mean there is a significant opportunity for the Charity Register to become a more user-friendly, data-oriented register, harnessing AI to produce powerful analyses of sector trends and impacts.

As the Charity Commission embarks on this journey, it would welcome input from those who currently use the Charity Register on how to make it a more valuable resource to the impact community

- How are donors and impact investors currently using the Charity Register to make funding decisions?
- What are its limitations and what changes would users like to see?
- Could the new guidance on impact reporting be a catalyst for providing more valuable information?
- If so, what are the pros and cons of prescriptive vs. flexible impact reporting requirements?

Expert: Holly Riley, Head of Strategic Policy, The Charity Commission

32. Unlocking Systemic Scale in the Impact Economy

Increasingly the Impact Economy is being seen as an interconnected ecosystem where no one part of the system can scale up their impact without system wide change driving towards a common objective. In this roundtable we will look at the Impact Economy from an ecosystem perspective exploring its systemic challenges and potential solutions.

We will explore:

- What a systems thinking approach is and how it applies to the Impact Economy
- What challenges exist at the systemic level for the Impact Economy
- What are possible levers to address these challenges
- The different roles to play including
 - Intermediaries and system-wide convenors in addressing these challenges
 - Profit-making sector
 - Public sector
 - Not-for-profit sector

Expert: Stephen Bediako, Partner, Deloitte UK

Better Grantmaking

33. Effective corporate philanthropy

Unlike other forms of philanthropy, corporate philanthropy is often a two-way street. Partnerships with non-profits are often formed to enhance the corporate brand, engage employees or gain competitive advantage. It is therefore vital for corporates, and their foundations, to maintain a laser focus on effective giving.

This session will explore what it takes to ensure best practices in corporate giving:

- Building trusting and transparent relationships
- Identifying non-profit needs and offering appropriate resources
- Ensuring clear and proportionate impact measures
- Covering core costs
- Planning funding horizons and exits
- Engaging business stakeholders and aligning strategic goals

Expert: Faye Jordan, Head of Strategic Charity Relationships, Barclays

34. Reaching rural communities

With place now central to the government's impact policy agenda, questions are being asked about how effectively current funding strategies reach rural communities. Urban bias in data, sparse populations, informal civil society, and assumed homogeneity all contribute to rural needs being overlooked.

This session will examine how funders and policy makers can better support rural communities and ensure impact reaches places that are often “off the map”, by asking:

- To what extent are funders and social enterprises currently addressing rural challenges – and what are the challenges they face?
- What are the key knowledge gaps about rural needs and how can they be filled?
- Could improvements to rural funding transform wider impact strategies?

Experts: Justin Sargent, Chief Executive of Somerset Community Foundation and Nicola Frost, Head of Impact, Insight and Learning at Devon Community Foundation

35. Can open grantmaking drive systemic change?

While many foundations embrace collaboration, most charities still experience fierce competition for scarce resources. Open grantmaking practices – from participatory prioritisation to shared due diligence and open evaluation – could help shift this norm.

This session will examine how openness in funding practice might support system change, not just individual projects, by asking:

- Should foundations prioritise openness in particular operational areas (strategy, landscaping, funding criteria, evaluation)?

- Can funders and investors achieve more by being open themselves, or by encouraging openness among grantees and investees?
- Are there “quick wins”, such as open IP clauses in funding and investment agreements?
- What are the benefits and potential drawbacks of greater openness for charities, systems and wider society?

Expert: Tris Lumley, Director of Open For All, NPC

36. From niche to the mainstream: Environmental philanthropy

Environmental philanthropy is rapidly becoming a priority for funders - especially those from younger generations. From health and inequality to community resilience, environmental factors increasingly shape outcomes across the funding landscape. Yet many do not see themselves as “environmental philanthropists” - and can feel uncertain about how, or where, to engage.

This session explores the growing relevance of environmental philanthropy, and how advisers can help funders to add an environmental lens across their funding priorities, enabling funders to embed environmental considerations into their strategies without needing to pivot their entire focus.

- How can funders engage confidently in a complex environmental landscape without being environmental specialists? And how can advisers best support them?
- How can funders find intersections between their priority interest areas and environmental issues? How can advisers convey the importance of this?
- What do we mean by place when we talk about environmental philanthropy?
- What different funding mechanisms are available?

Experts: Jack Chellman, CEO, Global Returns Project and Nick Gardner, Environmental Funders Network

37. Leveraging brand and partnership for lasting impact

One of the advantages of high-profile philanthropy is that the brand can create a bridge spanning the interests of stakeholders across society - enabling assets to be unlocked that go beyond funding. This session will draw on the experience of Gary Stannett, CEO of the Rio Ferdinand Foundation, to explore how the foundation balances reputation, professionalism and accountability to forge trusted links between corporates and communities, by asking:

- What are the opportunities that come from high-profile celebrity engagement in philanthropy, and where does it create constraints?
- What assets does this form of philanthropy unlock that go beyond funding?
- How do you maintain the brand while also meeting the needs and expectations of all stakeholders?
- What should corporates and non-profits know before entering into a high-profile partnership?

Expert: Gary Stannett MBE, CEO, Rio Ferdinand Foundation

38. Artificial Intelligence: The future shifts that will shape the impact economy

In this session, Tim Cook, CEO and founder of AI Confident will explore how AI will drive societal changes, what new needs will emerge and what needs will grow - and how the impact economy needs to respond. He will also touch on the opportunities presented by AI and how philanthropists, impact investors and advisers can embrace those opportunities, structured around the following three futures:

- A future we know: What is happening in society today based on the AI technologies that have been in use for the last few years
- A future we can see: What will happen as the latest technologies, such as AI Agents, are diffused more widely across society
- A future less certain: As big tech companies race towards Artificial General/Super Intelligence

Expert: Tim Cook, CEO, AI Confident

39. Strategies for spending down

Drawing on insights from trusts and foundations already spending down, this session explores how fixed time horizons reshape funding strategies, governance, culture and relationships with grantees. It will also examine how an investment portfolio can be managed through the process, and what support trustees need to implement spend-down decisions, by discussing:

- How time limits reshape power, trust and decision-making
- The impact of spend-out approaches on grantee relationships
- Rethinking legacy, sustainability and “lasting” impact
- Practical implications for governance, staffing and strategy
- What perpetual funders, investors and advisers can take from spend-out thinking

Experts: Sally Vivyan, Co-Director of Gower Street and Oliver French, Independent Consultant

40. Civil society trends

Civil society is evolving in response to economic pressures, political change and shifting community expectations. This session will explore major trends affecting charities, community organisations and social enterprises – and what they mean for funders and impact investors, by discussing:

- The macro trends reshaping civil society in the UK
- How organisations are adapting their models, governance and partnerships
- What these shifts mean for funder strategies, risk management and collaboration

Experts: Rob Williamson, Chief Executive and Hannah Mackay-Christie, Senior Policy and Public Affairs Adviser, Community Foundation North East