

The Role of Philanthropy in HNW investing

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What is philanthropy?

Phil

love of

anthropos

mankind



What is philanthropy?

“The planned and structured giving of money, time, information, goods and services, voice and influence to improve the wellbeing of humanity and the community”

Philanthropy Australia



Philanthropy - the competitive advantage

- A means to attract and retain HNW clients
- Attract and retain “sticky” funds under management
- Create closer and more trusting client relationships
- Provide valuable structured and innovative solutions for your clients



What does philanthropy offer your client?

- Innovative solutions to manage tax liabilities
- A means for clients to express their personal values, make them happier
- Create closer and more trusting client relationships
- Address family situations
- Business succession



The role of the adviser - Process

The conversation

- Affordability and legacy
- The hurdle - will I want it?
- What structure do I want?



Structured giving vehicles

- Fastest growing form of philanthropy in Australia
- PPFs
- Donor-advised funds – ancillary – gift funds
- Community Foundations



Two levels of investing

- **Giving vehicle investment portfolio**
What do I need to do to finance my charity portfolio?

- **What will a charity portfolio look like?**
- “Investing” in the social outcome
- What are my \$\$\$ going to do?



Investment portfolio

- Preservation of capital
- Income
- Capital growth
- Mission-driven???



Charity portfolio

- What is acceptable risk?
- Causes
- Charities
- Projects

