

EUROPEAN ASSOCIATION FOR
PHILANTHROPY & GIVING EAPG



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www.eapg.org.uk – info@eapg.org.uk

EAPG London Annual Conference
8.45 am for 9.00am-5.45pm Tuesday 24 November 2009

Developing a Culture of Effective Philanthropy in the UK: What is the Role of the Wealth Adviser?

**Keynote Speaker: Stephen Dawson,
Co-Founder and Chair, Impetus Trust and Jacana Venture Partnership**

Hosted and Sponsored by Withers LLP
16 Old Bailey, London, EC4M 7EG

Media Partners: The Society of Trust and Estate Practitioners (STEP)

Chairs for the Day: Clive Cutbill and Richard Cassell, Withers LLP

Morning Programme

8.45 Registration and Coffee

9.15 – 9.45am Opening session

What motivates the philanthropist? How can understanding these motivations enable advisers and charities to engage more effectively with clients, donors and philanthropists?

- Dr Eleanor Shaw, University of Strathclyde

9.45 – 10.30am Discussion Panel

Philanthropy and the Wealth Adviser: Why should wealth advisers invest time and money in developing philanthropy services for clients?

How much demand is there for these services? How are advisers currently performing in providing philanthropy, in-house or via third parties? What benefits can philanthropy bring to the adviser-client relationship? How commercially viable and sustainable are philanthropy services?

- Clive Cutbill, Consultant, Charities & Philanthropy Team, Withers LLP (Chair)
- Wilson Cotton, Director, Private Client Tax Services, Smith & Williamson
- Richard Child, Director, Paradigm Norton Financial Planning
- Rebecca Eastmond, Head of UK Philanthropy, JP Morgan Private Bank
- Lucy de las Casas, Head of Consulting, New Philanthropy Capital (NPC)

10.30 – 11.15am Discussion Panel

Professionalising Philanthropy? Developing effective engagement, long-term stewardship and a culture of client service in the sector.

How far can and should charities go in adapting to fit the needs of the donor? Should they be doing more to appeal to impact-focused philanthropists? Should they be offering other ways for donors to become actively involved in their work?

- Sal LaSpada, Chief Executive, Institute for Philanthropy (Chair)
- David Gold, Chair, A Glimmer of Hope (UK)
- Anna Josse, Chief Executive, Prism the Gift Fund
- Paul Knox, Head of UK Wealth Advisory, JP Morgan
- Mark Rowland, Head of Philanthropy, Christian Aid

11.15 – 11.45am Coffee Break

11.45 – 12.30pm Discussion Panel

Giving Philanthropists a Choice: developing a menu of options for giving and social investment.

Is there room for greater collaboration between advisers and intermediaries? When does it make sense for advisers to turn to 3rd parties?

- Richard Cassell, Partner, Withers LLP (Chair)
- Olga Alexeeva, Head of CAF Global Trustees, Charities Aid Foundation (CAF)
- Mark Campanale, Adviser, Halloran Philanthropies
- Malcolm Hayday, Chief Executive, Charity Bank
- Jessica Stuart, Network Consultant, Community Foundation Network (CFN)

12.30 – 1.00pm Keynote Speaker

Stephen Dawson, Co-Founder and Chair: Impetus Trust and Jacana Venture Partnership

1.00 - 2.00pm Lunch

Afternoon Programme

2.00 – 2.45pm Discussion Panel

Family Philanthropy: Could your clients' children be the next generation of philanthropists?

How might philanthropy aid the financial and succession planning of wealthy families? What role can it play in the intergenerational transfer of wealth and values?

- Simon Weil, Head of Individuals, Bircham Dyson Bell (Chair)
- Louise Adams, Managing Director, Anthos London Ltd.
- Grant Gordon, Director, Institute for Family Business (IFB)
- Bella Hopewell, Partner, C. Hoare & Co.
- Penny Lovell, Client Director, Rothschild Private Management Ltd.
- Alexander Scott, Executive Chairman, Sand Aire

2.45 – 3.30pm Discussion Panel

Tax and Philanthropy: Building a Culture of Philanthropy in the UK

Should philanthropists and the charity sector be pushing for new giving vehicles that offer donors greater options and flexibility? What level of interest is there in developing new approaches for planned giving in the UK?

- Keith Johnston, Director of Policy & Communications, STEP (Chair)
- Matthew Bowcock, Chair, Community Foundation Network (CFN)
- Helen Donoghue, Director, Charity Tax Group (CTG)
- Nick Hurd MP, Shadow Minister for Charities, Social Enterprise and Volunteering
- Julian Smith, Partner, Farrer & Co.

3.30 – 4.00pm Coffee Break

4.00 – 4.45pm Discussion Panel

Demonstrating Impact: Establishing an effective dialogue between philanthropists, charities and wealth advisers.

What are wealthy donors expecting in terms of reporting and evaluation from the charities they support? Are they prepared to pay for effective monitoring and reporting? What role do advisers and intermediaries have to play?

- Theresa Lloyd, Independent Consultant, Theresa Lloyd Associates (Chair)
- Emilie Goodall, Investment Manager, Venturesome
- Tris Lumley, Head of Strategy, New Philanthropy Capital (NPC)
- Caroline Underwood, Director of Philanthropy & Partnerships, Save the Children

4.45 – 5.45pm Workshop

'Philanthro-poly': Understanding what your clients and donors want from their philanthropy.

- Clare Brooks, Head of Philanthropy, Community Foundation Network (CFN)

5.45pm Post-conference reception and drinks

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To attend EAPG's Conference please email sue@eapg.org.uk, or please complete and return this form to 'EAPG, 79 High Street, Lenham, Maidstone, Kent, ME17 2LA.'

Payments by credit card, invoice or cheque payable to 'EAPG'. Payment is due before the 17th of November 2009.

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EAPG London Conference Tuesday 24 November 2009

8.45am for 9.00am – 5.45pm followed by drinks

Venue: Withers LLP, 16 Old Bailey, London, EC4M 7EG

Nearest Underground stations: St Paul's, City Thameslink, Chancery Lane

A map for the venue can be found at:

<http://www.withersworldwide.com/offices/london.aspx>

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