

# Breaking the barriers of giving



## Things to think about



“It’s every man’s obligation to put back into the world at least the equivalent of what he takes out of it” (Albert Einstein)



# ‘Giving while living’



‘Seeing is believing’



# ‘Recognising the dark side of wealth’



# ‘Balancing heart and mind’



## Philanthropy Mission



- Support Private Bankers (50% )
  - Acquire new clients
  - Increase share of wallet
  - Build client loyalty
- Support Coutts Brand (50% )
  - Create competitive advantage
  - Develop intellectual capital
  - Achieve leadership position



# Philanthropy Proposition



## Philanthropy Services

- Philanthropy advice
- Charitable trusts
- Charity investment
- Charity banking
- Specialist philanthropy advisers

## Forums for Philanthropy

- For clients and prospects
- Education and networking
- Regional and London
- Assets and responsibilities

## Donor Advised Funds

- Microfinance and environment
  - Market information
  - Signposting charities
  - Collective giving

## Publications, Research, Articles

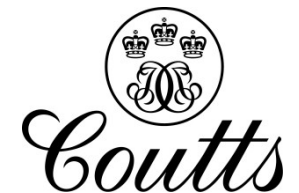
- Handbook for Philanthropy
- Million Pound Donors Report
- A Guide to Giving
- Specialist philanthropy advisers



## Philanthropy advice



- Introducing philanthropy into wealth management conversation
- Exploring motivations and objectives
- Holding strategy workshops
- Documenting guiding principles, areas of interest, process for reaching decisions
- Involving specialists, choosing charities, reviewing grant applications, conducting site visits, evaluating impact of donations



## Using specialist advisers



- New Philanthropy Capital
- Community Foundation Network
- Charities Aid Foundation



## Forums for Philanthropy



- John Humphrys
- Gordon Roddick
- Sir Tom Shebbeare
- Percy Barnevik
- Dr Frederick Mulder
- Dame Stella Rimington
- Lord Karan F Bilimoria
- Jamie Cooper-Hohn
- Jamie Oliver



# Donor Advised Funds



## Microfinance and Environment

- Advisory Panel
- Donor Committee
- CAF
  
- Background and overview documents
- Summaries of short listed organisations
- Introductions to sector experts
- Invitations to themed forums



# Handbook for Philanthropy



## Questions to ask yourself

- How much do I know about the causes or charities I am supporting or want to support?
- Do I know other people who share similar interests to me?
- How can I find out what other philanthropists have been doing?
- Could I be interested in a joint venture with another donor?



# Million Pound Donor Report



In association with The Centre for Philanthropy, Humanitarianism and Social Justice, University of Kent

- An analysis of data on donations of £1 million or more
- Aims
  - to assess the scale and impact of such gifts
  - to get a better understanding of who is making them and what causes they are supporting



## Things to think about



“As the purse is emptied, the heart is filled” (Victor Hugo )



# Important Information



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