

## Involving the Next Generation

**Essential knowledge for professional advisors advising families and the next generation of philanthropists.**

### WHY ATTEND?

In the third event of the 2017 Philanthropy Programme series, an expert panel will bring delegates to understand what the changing trends in intergenerational wealth transfer are, the variety of roles philanthropy can play in the generational changeover, and how best to use these to create a smooth succession and offer value to the next generation of wealth holders.

## How To Register

For more information and to book, please visit:

[www.philanthropy-impact.org/the-philanthropy-programme](http://www.philanthropy-impact.org/the-philanthropy-programme)

[www.step.org/the-philanthropy-programme](http://www.step.org/the-philanthropy-programme)

### Delegate Rates

Members\* £65

Non-members £80

**\* Member rate includes: Philanthropy Impact Members, STEP Members, and STEP Philanthropy Advisors Special Interest Group (SIG) Members**

**Date** Tuesday 19 September

**Time** 16:00 Registration; 16:30-18:00 Presentations; 18:00 Networking Reception

**CPD** 1.5 hours

**Venue** STEP Offices, 7th Floor, Artillery House (South),  
11-19 Artillery Row, LONDON, SW1P 1RT, United Kingdom

**Nearest Tube** Victoria or St James's Park

**Chair:** **Valerie Remoquillo-Jenni**, Senior Advisor, VALUEworks AG.

**Panel:** **Alana Petraske**, Special Counsel, Charities and Philanthropy, Withers LLP; other speakers to be confirmed.

### EVENT FOCUS

Advising successful business owners or wealthy families largely means engaging with multiple generations, and more specifically the next generation. Providing a smooth succession between generations, whether the next generation is taking over the entire family business or its philanthropy arm, continues to be an important role of the professional advisor. They should be in a position to advise and guide on that journey.

At this event, we will discuss the variety of roles philanthropy plays in the generational changeover; be it a means to engaging the next generation in the family business; an area where a new owner can demonstrate the change in leadership by altering the philanthropic activities of the business; or perhaps an entire generational shift in beliefs and values resulting in businesses either being structured in such a way that they are more philanthropic, or indeed sometimes sold off altogether with funds being re-purposed into other philanthropic endeavours.

An expert panel will discuss the different methods of involving the next generation in philanthropy and the first steps. They will give an overview of both the opportunities and challenges, helping advisors to navigate and address the issues most important to families involved in this transition.

Topics to be covered include:

- Methods and opportunities for involving the next generation in the family's wealth creation and philanthropy
- The role of philanthropy as a source to bringing a family together
- Advising families on legal issues regarding foundations and planning for transfers to the next generation
- The professional advisor's role in managing the transition of wealth across generations
- Changing trends in intergenerational wealth transfer and its impact
- Trends amongst next generation wealth holders and what they look for from their advisor

## Terms & Conditions

All events qualify for 1.5 hours of structured training under Philanthropy Impact, STEP and other self-certified CPD schemes. Cancellations must be received in writing at least 7 working days prior to the event and will be subject to a £15 cancellation fee. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full event fee.

As joint owners of The Philanthropy Programme, Philanthropy Impact and STEP have joint ownership of all data, including delegate data. Data will not be shared with any third party organisations. By registering for events, you consent to receiving related emails from Philanthropy Impact and STEP.

Produced by:

