



# PHILANTHROPY AND CHARITABLE GIVING

We can work together to help grow your business and meet the needs of your clients



## Giving solutions

We offer a range of structures which are designed to make giving as easy and enjoyable as possible and handle the ongoing administration and set up.



## Advisory services

We can offer tailored advisory and consulting services to both you and your clients for those interested or already engaged in philanthropy and charitable giving.



## Events and learnings

We host a number of events which tackle some of the most commonly asked questions. We can tailor these in a way that best suits you.

Contact us for more information: [03000 123 028](tel:03000123028) or email [partners@cafonline.org](mailto:partners@cafonline.org)

\*\*\*We do not provide investment or tax advice.\*\*\*

## How we can help your business

Depending on what works best for you, we offer a range of flexible solutions which are tailored to your needs.

We can:

- Facilitate round table discussions which are designed around a topic that you would like to know more about.
- Share learnings and support you in how to approach the subject of philanthropy and charitable giving through interactive Lunch and Learn sessions.
- Host a number of events and webinars and produce publications to help build your knowledge of the sector.
- Support you in accessing the next generation of wealth by giving you the tools to start discussing philanthropy.
- Offer you a range of corporate services to help ensure your business is having the most impact.

## How we can help your clients

Feedback from the professional advisors we work with confirm that working with us has added significant value to their client relationships.

We will work with you to:

- Give your client the structure to be able to fulfill their philanthropy and charitable giving tax effectively without the need to register their own foundation.
- Work with your client to create a giving strategy and help them to identify the organisations that best support this whilst engaging the whole family.
- Support your client to give overseas through our global reach and working with our international offices.
- Ensure that your client has access to a team of experts and the opportunity to meet other likeminded individuals to support their giving journey and ambitions.

## 3 WAYS TO MAXIMISE YOUR BUSINESS

With over 90 years experience working in the sector we are best placed to support you.

1

### UNDERSTANDING YOUR CLIENTS

Discussing philanthropy and charitable giving with clients opens up a number of doors to help build the relationship to understand their values and interests.

2

### MEETING YOUR CLIENTS NEEDS

Partnering with us means that you can offer the solutions for your clients without the cost of establishing them in-house.

3

### DELIVER A FIRST CLASS SERVICE

Work with us to ensure that you have a broader proposition to help you offer your clients a holistic service, grow your revenue and acquire new clients.

## Contact us

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