

?h philanthropy

Are you adequately trained to discuss philanthropy with your clients?

Philanthropy Advisor Training – bringing your organization up to speed in philanthropy services

Why a philanthropy training?

According to research, 90% of wealthy individuals recognize the need for expert advice on philanthropy. Yet, the majority of wealth managers feel they are not adequately trained to discuss philanthropy with their clients. Philanthropy is a rapidly growing trend and philanthropy services are one of the key offerings the Luxembourg market place needs to develop in order to be able to serve an increasingly sophisticated and demanding clientele.

This is why Fondation de Luxembourg proposes you a philanthropy training in cooperation with PricewaterhouseCoopers. Over a couple of days, renowned experts and practitioners will enable participants to discover the practical and fiscal aspects of giving. The intention is to bring you the necessary insight and knowledge, which will help you to manage your clients' expectations in this field and thereby deepen your client relationships and explore new business opportunities.

For your organization, this will allow you to build in-house philanthropy expertise at a fraction of the cost.

We look forward to welcoming participants from your organization.

Tonika Hirdman
Director General
Fondation de Luxembourg



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Participants in the training will acquire in-depth knowledge in the following areas:

- Understanding why philanthropy should be part of the services offered by wealth advisers.
- Insight in the expectations of today's philanthropists including the latest trends, such as venture philanthropy and social entrepreneurship.
- Introduction to key principles of effective giving.
- In-depth insight in the fiscal aspects of engaging in cross-border philanthropy.
- In-depth knowledge about the legal framework for donations.

Program structure

Common building block (6 hours):

- Changing customer needs and interests
- Illustrations of various forms of modern philanthropy
- Philanthropy and wealth management
- Global legal framework for donations
- Global fiscal environment
- Concrete illustrations of projects: external testimonies
- Advantages of Luxembourg for philanthropy

Modular fiscal overview:

Each participant will be attending at least one of the following sessions, and will have the opportunity to register for several sessions. Each module will cover the fiscal and legal frameworks for donations (2 ½ hour course led by an expert from PricewaterhouseCoopers) and an interactive case study (1 hour).

Legal and fiscal framework for philanthropy:

- Belgium
- France
- Germany
- The Netherlands

Who should attend?

The course is intended for Senior Wealth Managers and Estate Planners with an interest in philanthropy services.

When?

June 9th – June 11th, 2010

June 9th morning

General philanthropy training (Fondation de Luxembourg) Common building block

June 9th afternoon

International fiscal and legal framework (PWC Luxembourg) Common building block

June 10th morning

Fiscal and legal framework, The Netherlands (PWC Amsterdam) Module

June 10th afternoon

Fiscal and legal framework, Germany (PWC Frankfurt) Module

June 11th morning

Fiscal and legal framework, Belgium (PWC Brussels) Module

Lunch gathering all participants at Cercle Munster

Social Impact assessment (McKinsey) Common building block

June 10th afternoon

Fiscal and legal framework, France (PWC Paris) Module

Language

The course will be held in English.

General information and fees

Venue

Chambre de Commerce, 7 rue Alcide de Gasperi, Luxembourg Kirchberg

Information

For questions about the program, please contact Raoul Chevignard (raoul.chevignard@fdlux.lu, Tel. +352 27 47 48 1) or visit the program website www.fdlux.lu/philanthropyadvisortraining

Fees

A fee will be charged in order to cover the expenses incurred by the PWC fiscal experts: Common building block, including fiscal coverage of one country: 1 500€
Each additional country: 250€

Registration

By using the attached coupon and by paying the appropriate amount to IBAN LU76 0019 3055 6148 0000
Account Holder: Fondation de Luxembourg - Events

Only registrations where payment has been received will be considered.

Please note that the number of participants is limited. Therefore, we need to limit the participation to a maximum of two representatives from each organization. Registrations will be considered on a first come, first served basis.



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