

Certificate in Philanthropy and Social Impact

8 - 9 MAY 2023 OR 10 - 11 MAY 2023

ONE MARINA BOULEVARD

PROGRAMME

The Certificate in Philanthropy and Social Impact is a 2-day programme to help you formulate philanthropic and social impact frameworks and strategies for your Family Office and clients. Learn from leading global and local experts on how to integrate Philanthropy into your advisory practice and build deeper, more meaningful connections with Family Principals and clients.

CURRICULUM

This programme is designed specially for professionals and advisors with over 3 years of experience working with Family Offices, Family Foundations or Ultra High Net Worth Individuals (UHNWI). Participants will learn to identify and structure philanthropic and social impact strategies, incorporating them into their wealth planning practices.

Learn how to:

- Conduct conversations of philanthropy and identify the key values and principles that drive a family's purpose
- Integrate charitable planning with the client's overall estate and business planning
- Leverage different tools and strategies for effective philanthropic giving and social impact
- Measure social impact and understand how to conduct due diligence on charitable giving opportunities and social investments
- Discuss forms of philanthropic communications and reporting, client management and ethical considerations in philanthropy

Emerge as a trusted advisor to help clients achieve a positive impact for themselves, their family and the community.

FACULTY



Asst. Professor Dien Yuen

Lead Faculty for Philanthropy, WMI

Experienced wealth advisor and former Chief Philanthropy Officer, Give2Asia

Dien Yuen, JD/LLM, CAP®, AEP® holds the Blunt-Nickel Professorship in Philanthropy at The American College of Financial Services, where she teaches in the Chartered Advisor in Philanthropy (CAP)® program. She is an internationally recognized authority on global philanthropy, family philanthropy, and emerging models for corporate and community giving.

Prior to joining the College, Professor Yuen served as Managing Director and Fiduciary Advisor for a wealth management firm assisting high net-worth individuals, families, and charitable institutions. Her former positions include Chief Philanthropy Officer at Give2Asia, Vice President and Senior Trust Officer at U.S. Trust, Executive Director of the IIT Bombay Heritage Fund, Vice President of the Asian Pacific Fund, and Planned Giving Director of the American Cancer Society. She is also the founder of a boutique social impact research and advisory firm serving clients in the U.S. and Asia.

*The programme will also feature guest speakers from the industry

FEES & FUNDING

This programme is pending accreditation by The Institute of Banking and Finance (IBF) under the IBF Standards Training Scheme* (STS). Singaporeans and Permanent Residents are eligible for enhanced funding support under the revised IBF funding quantum from 1 January 2023.

	Fees <u>before</u> Subsidy (incl. of GST)	Fees <u>after</u> IBF Subsidy (incl. of GST)	
		Singaporean Age Below 40 / PR (50% IBF-STs Funding)	Singaporean Age 40 & Above (70% IBF-STs Funding)
Application Fees	S\$85	S\$85	S\$85
Tuition Fees	S\$3,672	S\$1,972	S\$1,292



CONTACT US

Scan the QR code, or click [here](#) to register.

To register or for any enquiries, please email us at RSVP@wmi.edu.sg