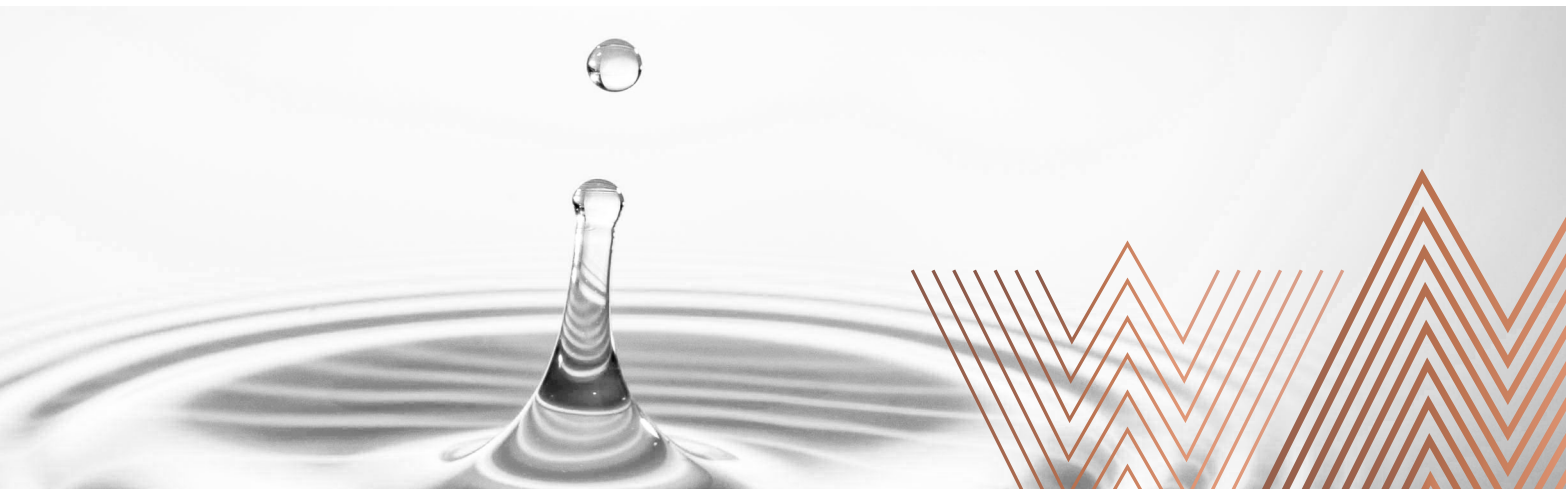


Certificate in Philanthropy and Social Impact

Eligible for
15 IBF-STC CPD hours

Up to 70% IBF Funding
for Singaporeans and
Permanent Residents

Learn from WMI's Lead Philanthropy
Faculty and industry speakers



Next intakes:
30 - 31 Jan, or
1 - 2 Feb 2024

One Marina Boulevard,
#16-01, Singapore 018989

Contact us at rsvp@wmi.edu.sg

The Certificate in Philanthropy and Social Impact will help wealth advisors, wealth planners and family office professionals formulate philanthropic and social impact frameworks and strategies for Family Offices and clients. Learn from leading global and local experts to integrate Philanthropy into your advisory practice and build deeper, more meaningful connections.

This programme is designed especially for professionals serving Family Offices and the Ultra High Net Worth (UHNW) to identify and structure philanthropic and social impact strategies and incorporate them into their wealth planning practices.

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

Modules

Section 1: Defining philanthropic and social impact objectives in the context of wealth planning

Learn how families approach philanthropy, and how to set objectives and define a philanthropic approach that is tailored to the unique needs and legacy considerations of each family.

Section 2: Different approaches and strategies to carry out philanthropic and impact activities

Learn about the different strategies and trends for carrying out philanthropic activities, and the different ways a family can make impact.

Section 3: Implementation of philanthropic and social impact activities

Understand the practical aspects of implementing philanthropy, including different types of structures and how to decide which organisations to support. Learn about due diligence considerations and how to measure real impact.

Who should attend

- Multi and Single Family Office Representatives
- Family Foundation Representatives
- Wealth and Estate Planning Professionals
- Private Bankers and Client Relationship Managers handling UHNW and Family Office segment
- Family Trust Advisors and Consultants
- Private Client Practice Professionals including lawyers, tax professionals and accountants
- Non-Profit Organisations and Charities Professionals

Enquire Now

or scan to enquire



Meet Your Faculty



Dien Yuen
Lead Faculty for Philanthropy, WMI
Experienced philanthropy advisor
and former Chief Philanthropy
Officer, Give2Asia

Recipient of WMI's Distinguished
Teaching Award

A sought-after strategist, speaker, instructor, and practitioner of philanthropy, Dien has spent the past 25 years fostering innovation and creating impact for communities worldwide.

Dien is currently CEO of Daylight Advisors. Bringing together her expertise in gift planning, wealth management, professional development, and social impact, Daylight helps maximize philanthropy's potential for transforming lives by advancing the training, research, professionalisation, and diversity of today's philanthropic field.

She also serves on the boards of Give2Asia, Giving Compass, Angel Island Immigration Station Foundation, and The 1990 Institute and is an advisor to the Asia Society Northern California and Global SF. In addition to teaching at WMI, she is an active advisor to many of Asia's leading philanthropists.

Previously, Dien founded the Center for Philanthropy and Social Impact at The American College of Financial Services, where she was the Blunt-Nickel Professor in Philanthropy for the Chartered Advisor in Philanthropy® (CAP®) designation. In addition, she developed and launched Purpose School, an immersive, interactive learning experience to help leaders explore the intersection of meaning and purpose in their lives.

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 was also the founder of a boutique social impact research and advisory firm serving clients in the U.S. and Asia.

Accreditation & Fee Breakdown

In addition to the tuition fees, there will be an \$85 non-refundable application fee. The fees listed are after IBF-STs funding. Any discrepancies in registration details or failure to meet minimum IBF academic requirements will result in an unsuccessful IBF reimbursement claim and students will be liable for the full tuition fees.

For funding eligibility criteria and more information regarding the funding, please visit www.ibf.org.sg/home/for-individuals/skills-and-jobs-development/training-support/IBF-STs.

SkillsFuture Credits can be utilised to offset the balance of the programme fees after IBF subsidy. Do note that SkillsFuture Credits cannot be used to offset Application Fees.

Global-Asia Family Office Circle (GFO Circle) Members are entitled to 10% discount across "Family Office" programmes. Click [here](#) for more information on GFO Circle membership.

	Full Fees		Fees after IBF subsidy (inclusive of 9% GST)	
	Before GST	After GST	Singaporeans Aged Below 40/ Permanent Residents (50% IBF-STs Funding) Company & Self- Sponsored	Singaporeans Aged Above 40 (70% IBF-STs Funding) Company & Self- Sponsored
TUITION FEES	S\$3,400	S\$3,706	S\$2,006	S\$1,326