

## Higher Calling:

USING  
PHILANTHROPY  
TO

Connect

WITH HNW CLIENTS



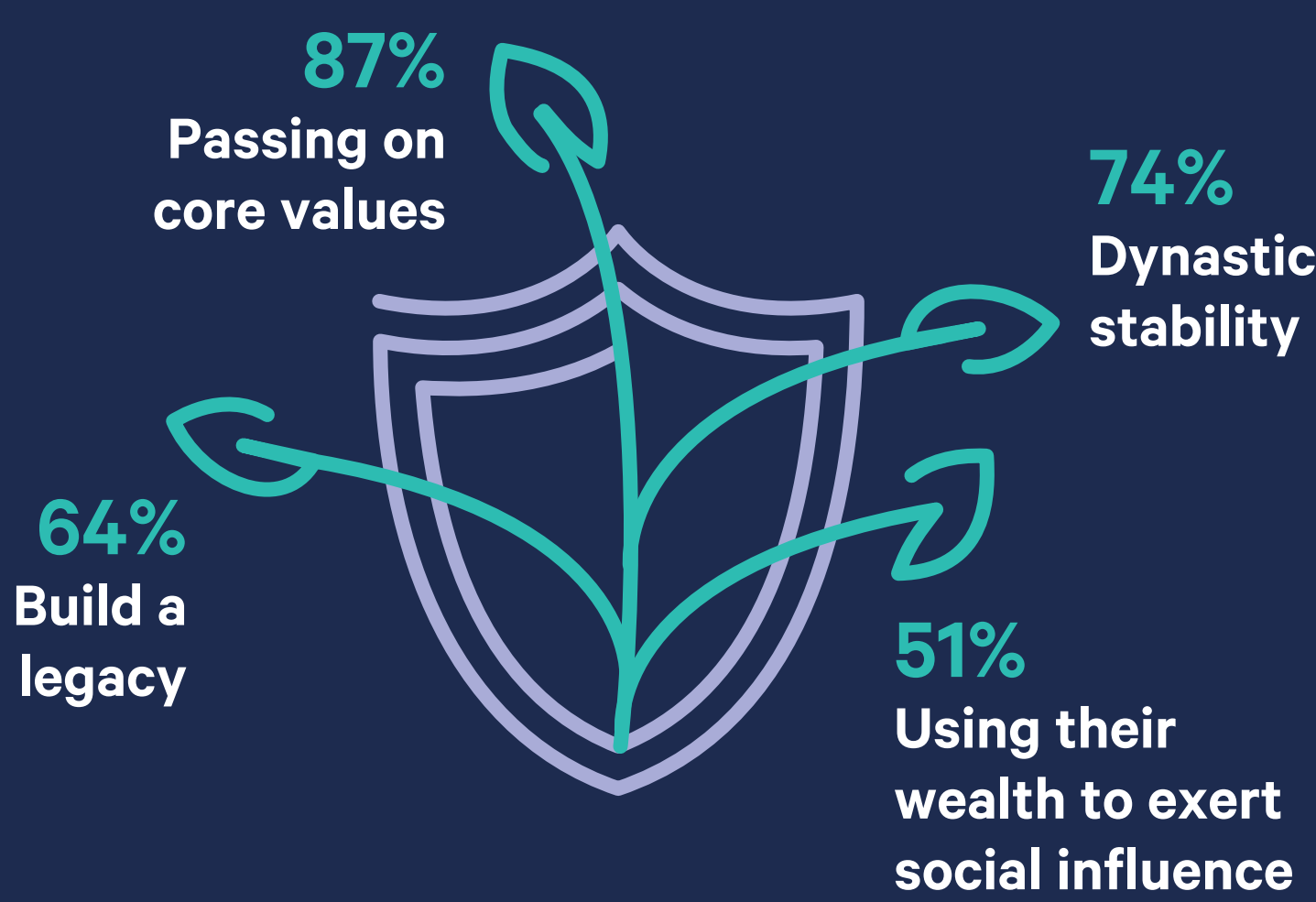
High-net-worth philanthropy is on the rise and opportunity abounds for advisors who want to create deeper client connections. Here's a look at how tapping into their philanthropic interests can help you provide holistic solutions.

The  
HNW  
Are  
Generous...



**7 out of 10** wealthy investors  
self-identify as philanthropic

...Strategic Philanthropy  
Helps Achieve Their Goals...



...They Want and Need Help  
from Their Advisors

**~ 95%**  
of single-family office executives  
believe more formal charitable guidance  
would be in the families' best interest

**~74%**  
have no clearly defined  
philanthropic goals

**~85%**  
have not engaged  
philanthropic advisors

**~73%**  
have not received  
formal philanthropic  
guidance

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**Don't shy away from discussing philanthropy.**

There are so many ways that you can add value, and clients likely aren't aware of the options available to them.

It's been great for our business, and I've really enjoyed connecting with clients through it.

– PRINCIPAL AT A \$13 BILLION MULTIFAMILY OFFICE PRACTICE

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## 3 Takeaways



**Integrate** INVESTMENTS,  
TAXES, ESTATE PLANNING  
and PHILANTHROPY  
under the wealth  
management umbrella

**FACILITATE  
CONVERSATIONS**

that drive results and  
referrals



**EXTEND REGULAR  
CLIENT INTERACTIONS**  
to engage around  
charitable interests