

7 Ways To Elevate Your Advisory Practice

DISCOVER THE PHILANTHROPY ADVANTAGE

Charitable planning is a growth engine for client retention, practice differentiation and future readiness. And with new philtech tools, integrating charitable planning has never been easier.


Here are seven ways philanthropy services can elevate your offering.

1

High-Net-Worth Clients Expect Philanthropy

85% of affluent households donate annually

91% of HNW individuals rate charitable giving as a priority



2

They're Underserved—and Ready for More


Only 47% are satisfied with these conversations

90% of HNW individuals want philanthropy discussed early in the relationship

3

Adjacent Services Drive Loyalty


The number of investors seeking comprehensive advice increased by **79%** between 2018 and 2023



4

Philanthropy is Versatile


Supports estate planning, tax mitigation, legacy building, values alignment and multigenerational engagement



5

Women's Economic Power


Women are set to control more than **\$34 trillion** in U.S. assets by 2030 and influence **85%** of family giving decisions



6

Millennials & Gen Z: Purpose Over Profit


87% of Millennials and **71%** of Gen Z made financial donations in the past year



7

Multigenerational Unity

81% of families with giving traditions report close bonds



ACCESS THE FULL REPORT >>

Dive deeper into the data, get key takeaways and find source information by checking out the complete [white paper here](#).

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