

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 intake:
21 - 22 Oct 2024
9AM - 6PM

Wealth Management Institute
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 with Family Principals and clients.

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

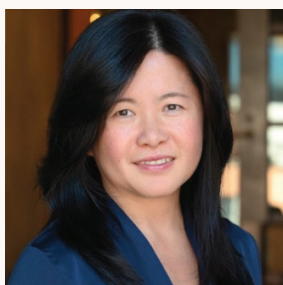
- Multi and Single Family Office Representatives
- Family Foundation Representatives
- Wealth and Estate Planning Professionals
- Private Bankers and Client Relationship Managers handling UHNW and Family Office segment
- Family Trust Advisors and Consultants
- Private Client Practice Professionals including 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
Co-Founder & CEO,
Daylight Advisors
Experienced wealth advisor and
former Chief Philanthropy Officer,
Give2Asia

Dien co-founded Daylight Advisors to revolutionize the field and practice of philanthropic advising.

She founded the Center for Philanthropy and Social Impact at The American College of Financial Services, where she also developed and taught courses as the Blunt-Nickel Professor in Philanthropy for the Chartered Advisor in Philanthropy® (CAP®) designation. While at the College, Dien launched the Advisors of Color CAP® Study Group, a support group for BIPOC advisors pursuing their designations. That initiative tripled the number of CAP-trained BIPOC philanthropic professionals in the field in less than three years. In addition, she developed and launched Purpose School, an immersive, interactive learning experience to help leaders explore the intersections of purpose and social impact in their lives.

Earlier in her career, Dien worked for several wealth management firms and held executive positions in regional and global development organizations. 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.

Accreditation & Fee Breakdown

The programme (TGS-2022602222) is accredited 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. The fees listed are after IBF-STC 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.

SkillsFuture Credits can be utilised to offset the balance of the programme fees after IBF subsidy.

Global-Asia Family Office Circle (GFO Circle) Members are entitled to 10% discount across "Family Office" programmes.

The information above is correct at the time of publication. Wealth Management Institute reserves the right to amend the fees and/or terms and conditions as appropriate.

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