



## **Adapting to 8 Trends in Philanthropic Advising**

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We're living in an unprecedented period of intergenerational transfer of wealth and creation of new wealth. The inheritors and wealth creators are more diverse and more interested in achieving social impact during their lives. They're ready to use a broader mix of tools and strategies to tackle the complex mix of social, economic, political, and environmental problems across the world.

Are you ready to guide clients and donors through this transformative era for wealth and philanthropy? In this session, you'll learn how to adapt to eight trends in advising donors' and clients' philanthropic and social impact goals. The insights are drawn from conversations with hundreds of professionals ranging from wealth advisors to fundraisers, and from family office staff to donor-advised fund leaders.

### **What are the 8 trends?**

1. Changing client base – women, Gen X and younger, diverse identifies
2. Evolving definitions of philanthropy - all the ways we use all our resources to benefit others and achieve impact
3. Evolving vehicles – charitable, private sector, public policy, peer based, and more
4. Questioning norms – past, present, privilege, perpetuity
5. Growing mistrust – of each other, nonprofits, philanthropy
6. Wealth planning – from fear to flourishing, Wealth 3.0
7. AI for good – fundraising/donor profiles, grantmaking augmentation, philanthropic funding norms
8. Messy marketplace – private equity investments, innovations (PhilTech)

### **Resource List**

[By Overlooking Women, Nonprofits are Leaving Billions on the Table](#), The Chronicle of Philanthropy, Stephanie Beasley, Aug. 22, 2024

[Giving Dashboard](#), Urban Institute, 2024

[Yvon Chouinard and the Patagonia Purpose Trust](#), Matthew F. Erskine, Forbes, Sept. 22, 2022.

[The Philanthropic Collaborative Landscape](#), Bridgespan, Sept. 2023

[Perpetuity or Spend Down: It's Not a Binary Decision](#), Jeff Glebocki, Exponent Philanthropy, 2019.

[Trust in Nonprofits & Philanthropy 2024](#), Independent Sector

[Wealth 3.0 From Fear to Engagement for Families and Advisors](#), Trusts & Estates, Feb. 2022.

[Responsible AI Adoption in Philanthropy](#), Technology Association of Grantmakers, Dec. 2023.

[AI Readiness and Adoption in the Nonprofit Sector 2024](#), Giving Tuesday, Generosity AI Working Group