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PARTNER
IN PLANNED
GIVING
SUCCESS



The How and Why of Philanthropic Advising



Date: September 24, 2020

Time: 1:00 – 2:30 Eastern

Presenter: Alasdair Halliday
Philanthropic Advisor and
Director of Principal Gifts
Harvard University



The How and Why of Philanthropic Advising



Let's start at the beginning...

Charlie Collier

Wealth in Families



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The family tree of *Wealth in Families*

**Shirtsleeves to shirtsleeves in
three generations**

Jay Hughes

Family Wealth: Keeping it in the Family



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The family tree of *Wealth in Families*

Intellectual frameworks

- The Four Capitals: Financial, Intellectual, Social, Human
- Dynamic Family Governance Compacts



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The family tree of *Wealth in Families*

Bowen Family Systems Theory

- Dr. Murray Bowen
- Individuation, Connection, Communication



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The family tree of *Wealth in Families*

Conversations with Harvard families

- Firsthand knowledge
- Confronting challenging issues



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Extending the framework

Leveraging Harvard expertise

**Revolution in understanding of
human behavior**



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Extending the framework

HBS Professor Michael Norton

- *Happy Money*
- Practice generosity
- Generosity feedback loops



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How Harvard practices Philanthropic Advising

Group events

- Family, Finance, and Philanthropy
- Seminars for reunion classes



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How Harvard practices Philanthropic Advising

Private conversations

- Listening
- Sharing the framework
- Charitable structures and assets



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Why Harvard practices Philanthropic Advising

To serve our donors by helping them
with matters they care deeply about

- Family
- Philanthropy



The How and Why of Philanthropic Advising



Why Harvard practices Philanthropic Advising

To serve Harvard by strengthening its community and resources

- Engage and thank supporters
- Raise our donors' sights and the efficiency of their philanthropy



The How and Why of Philanthropic Advising



Why you should practice Philanthropic Advising

To show you care

Because you can



The How and Why of Philanthropic Advising



How you can practice Philanthropic Advising

Host an event

Recommend an event

Give a book



The How and Why of Philanthropic Advising



You've been extraordinarily successful. People in my line of work know that the financial wealth that often accompanies success brings both opportunity and challenge to families. And so I'd like to give you this book as a small token of appreciation, and I hope it'll help you think through how you and your family want to respond to those opportunities and challenges.



The How and Why of Philanthropic Advising



There are no answers that are right and good for every family. But every family has answers that are right and good for them. And the best way to find those answers is to do a little thinking about the questions...and to talk.



Still Have a Question?

Contact: Alasdair Halliday

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