Slide 6

PG Calc
YOUR 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

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Slide 7

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The How and Why of Philanthropic Advising

Let's start at the beginning…

Charlie Collier

Wealth in Families

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Slide 8

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The How and Why of Philanthropic Advising

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 How and Why of Philanthropic Advising

The family tree of *Wealth in Families*

Conversations with Harvard families

- Firsthand knowledge
- Confronting challenging issues

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The How and Why of Philanthropic Advising

Extending the framework

 Leveraging Harvard expertise

 Revolution in understanding of human behavior

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The How and Why of Philanthropic Advising

Extending the framework

 HBS Professor Michael Norton
  - *Happy Money*
  - Practice generosity
  - Generosity feedback loops

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The How and Why of Philanthropic Advising

How Harvard practices Philanthropic Advising

Group events

 - Family, Finance, and Philanthropy

 - Seminars for reunion classes

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The How and Why of Philanthropic Advising

How Harvard practices Philanthropic Advising

Private conversations

- **Listening**
- **Sharing the framework**
- **Charitable structures and assets**

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The How and Why of Philanthropic Advising

Why Harvard practices Philanthropic Advising

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

- **Family**
- **Philanthropy**

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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**

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The How and Why of Philanthropic Advising

Why you should practice Philanthropic Advising

To show you care

Because you can

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The How and Why of Philanthropic Advising

How you can practice Philanthropic Advising

Host an event

Recommend an event

Give a book

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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.

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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.

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Still Have a Question?

Contact: Alasdair Halliday

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