

Dear {{{Recipient.FirstName}}}

Welcome to the summer edition of our Professional Advisors and supporters newsletter. We hope you have been enjoying the lovely sunshine we've had so far this year.

In this edition we are pleased to share two new initiatives that we are soon to launch, plus a report from the Financial Times on the business opportunity that philanthropy advice presents for professional advisor firms.

NEW

The North East Roots Fund is spearheading our new initiative to engage, convene and inspire the expat community to give back to our region. Starting with a launch event in London on 12 July the fund will support pathways to opportunity for young people, back community organisations focused on health, well-being and inclusion, and protect and nurture our inspiring places and spaces. You can read more about the initiative here: <https://www.communityfoundation.org.uk/northeastroots/>

While it is primarily aimed at "expats" we hope it will also appeal to those with business interests in the region, people who have attended school or university here, and others with a passion for and special connection to the North East. If you have any contacts that you think would be interested in attending the event, or finding out more about it, please do put them in touch with us.

COMING SOON

The Community Accelerator Fund will be a new way for small to medium sized businesses to come together and help develop the local workforce of tomorrow. Contributions to the fund will support projects dedicated to addressing skills gaps, employability, and STEM (science, technology, engineering, maths) education in communities across the North East.

Businesses can double their impact as all donations to the fund will be matched 1 to 1 by a generous Community Foundation donor. There will be opportunities to network with like-minded businesses, have their support publicised through our social media channels and website, and celebrate the impact of the fund through visits to benefitting charities and other events.

Any of your business contacts who may be interested in this new programme can speak to us to find out more or register their interest in it ahead of the imminent launch.

You may have seen this recent report from the Financial Times on why 'advisers must keep pace with booming philanthropy sector' but in case you missed it we have shared it below. The report states that data from Fidelity Charitable shows that:

"Investment advisers in the US that provide charitable planning services have three times the median organic growth of those that do not, and 1.3 times the median new money per investor. And with just 4 per cent of high-net-worth individuals surveyed by Campden Wealth reporting that they are satisfied with current philanthropy services, there is a clear competitive edge on offer to advisers that get philanthropy services right."

Here at the Community Foundation we are keen to help professional advisors discuss the topic of philanthropy with clients and give the right advice. Get in touch if you would like to arrange a meeting with us to chat through the options.

<https://www.ftadviser.com/opinion/2023/06/08/advisers-must-keep-pace-with-booming-philanthropy-sector/?page=1>

We would love to hear from you on any of the above, or if you have a general question that you think we could help with. Here is how you can contact us –

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Best wishes
Lisa & John



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