IBF-STS

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TGS-2026063356

IN-PERSON WORKSHOP

Strategic Philanthropy Advisory for Private Bankers

Target Audience
Private Bankers & Relationship Managers

Duration: 4 CPD Hours
Fee: SGD 650 per participant

EARLY BIRD DISCOUNT
Enjoy **10% discount** when you register **one (1) month before** the course commencement date.

@ conversations.

- Position philanthropy as a strategic component of wealth planning, aligned with legacy and impact goals.
- Develop the confidence and skills to guide clients from reflection to actionable giving plans.

Today's HNW clients are no longer asking where to donate. They are asking what their wealth should stand for. This workshop equips private bankers with the G.I.V.E. Framework, a proprietary 4-step conversation system, to move clients from transactional giving to transformational legacy planning, values-based conversations integrating philanthropy into holistic wealth stewardship.

The G.I.V.E. Framework

G — Gather Insights: Client Values & Philanthropic Vision

- Identify client motivations, passions, and giving priorities.
- Explore how personal values influence legacy and impact goals.

I — Inspire: From Transactional to Transformational Giving

- Navigate sensitive client discussions with confidence.
- Address hesitation, complexity, and emotional barriers in giving conversations.

V — Value-Driven Solutions: Structures & Vehicles

- Match client values to philanthropic vehicles: DAFs, foundations, trusts, impact investing.
- Collaborate with tax, legal, and investment specialists to enhance the proposal.

E — Empower: Turning Vision into Action

- Help clients set SMART goals with timelines, milestones, and measurable impact.
- Conduct NGO due diligence and track impact using GIIN and IRIS+ tools.

Assessment

- Formative Assessment – Presentation of Philanthropy Plan
- Feedback from peers and facilitators to enhance advisory approach
- MCQ

Practice & Application

- Apply the G.I.V.E. Framework and tools.
- Pitch a plan: develop and present a tailored philanthropy strategy.
- Receive peer and facilitator feedback on facilitation approach.
- Breakout group discussions from transactional to transformational conversations.
- Reflection exercise: personal commitment to advisory practice.

About IBF Certification

Technical Skills and Competencies (TSCs) and Proficiency Level (PL): Philanthropy Advisory Level 3

Participants are encouraged to access the IBF MySkills Portfolio (https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role. Find out more about IBF certification and the application process on here.

Up to 70% Funding
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Learn more:
IBF Standards training Scheme (IBF-STS)

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