



OVERVIEW

What impact are your clients trying to achieve?

Are you advising clients with philanthropic goals or responsible for helping them build a legacy of impact through charitable giving or funds?

Join Civic Compass, a cohort for financial and DAF advisors looking to bring value to their clients and help build a legacy through philanthropic and charitable efforts.

Civic Compass guides advisors supporting philanthropists through a six-month journey of introspection, exploration, and strategic planning for impactful giving. Through this journey, advisors will understand the optimal intersections between values, legacy aspirations, and the needs of communities to make grantmaking and DAF gifts more impactful.

Civic Compass



> Cohort program for advisors with clients interested in Philanthropic giving

> Philanthropic education to understand how your client's priorities and giving can align with community needs for the highest impact

> Insights into charitable strategies that build wealth and legacy and bring added value to your services.

Is this program right for you, contact us to learn more!



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Helping Advisors Navigate Philanthropy and Impact



Program Length

6-month cohort program

Over two quarters, cohorts will dive into a 2 phase curriculum on Philanthropy to understand values and practices while gaining insights to build business capacity, deepen client interaction and services.



Time

- 90-minute sessions zooms held once a month
- Bi-Monthly one-on-one check-ins to provide individual guidance to help you personally evolve your practice and business.



Additional Benefits

Virtual learning and networking platform, workbook and materials, quarterly panel sessions, and fireside chats,



Details

Cost: \$2000

2024 Registration Dates: April 1 - May 1

2024 Program Dates: May 15 - October 15

Defining Philanthropic Vision

Every individual has a unique relationship with their money and philanthropy. This relationship helps them to define their philanthropic vision – a personal expression of the change they wish to see in the world. Through several sessions, participants will learn how We help you articulate this vision by exploring your values, passions, and the causes that resonate most deeply with you. Together, we'll craft a philanthropic roadmap that aligns with your personal aspirations and leaves a legacy that reflects your true essence.

Aligning Legacy with Community Needs

Creating a meaningful legacy is about understanding the needs of the communities you wish to impact. We'll guide you through a process of identifying the most pressing challenges and opportunities within your chosen areas of focus. By aligning your philanthropic goals with community needs, you ensure your legacy is relevant, responsive, and creates lasting change.

Purposeful Giving: Maximizing Impact

Your legacy is not just about the amount you give; it's about the impact you create. We'll help you evaluate your philanthropic strategies to ensure they are aligned with your philanthropic vision and community needs. By analyzing your giving patterns, impact metrics, and philanthropic goals, we'll identify opportunities to maximize your impact and ensure your legacy is truly transformative.

Interested in learning more? Visit

www.civicapitalconsulting.com/civiccompass