Civic Compass

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.

- 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

4-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
- 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:	$1250
2024 Registration Dates:	July 22 - August 22
2024 Program Dates:	9/9/24 - 12/6/24

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 explore their own personal values while learning how to help clients articulate their vision and understand the values and causes that resonate most deeply with them. Together, we'll craft a philanthropic roadmap that aligns your practice and client legacy.

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 that identifies the most pressing challenges and opportunities within your community. By aligning philanthropic goals with community needs, you ensure your client's legacy is relevant, responsive, and creates lasting change.

Purposeful Giving: Maximizing Impact

Legacy is not just about the amount someone gives; it's about the impact created. Our facilitators help you evaluate your philanthropic strategies to ensure they are aligned with your practice, philanthropic vision, and community needs. By analyzing giving patterns, impact metrics, and philanthropic goals, we'll identify opportunities to help you maximize your client's impact and ensure their legacy is truly transformative.

Interested in learning more? Visit www.civiccapitalconsulting.com