Case study: Values-based philanthropy and investment

By Perpetual Sustainability

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In September 2022, we hosted global philanthropy experts Heather Lord-Newbury and Sawako Clarin in Australia as part of our partnership with the Stanford Centre on Philanthropy and Civil Society.

Heather and Sawako ran a series of 11 philanthropy workshops with private clients, philanthropists and sector leaders around the country. They provided insights into global philanthropic trends, as well as discussing values-aligned philanthropy and the importance of ensuring that family giving strategies align with all aspects of family investment, wealth management and community support.

These activities and workshops are included in the philanthropy toolkit, which our Community and Social Investment team created in partnership with Stanford. The toolkit helps philanthropists assess not-for-profits, identify the ones that are best aligned to the causes that matter most to them and to keep track of their giving.