

PICTET WEALTH MANAGEMENT

Philanthropie und Unternehmertum

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Zentrum für Impact

- Responsible investment strategy
- Endowment style investing
- Mission aligned investing

- Philanthropists
- Impact investors
- Experts
- Non-profits
- Networks

- Vision and mission
- Road map and strategy
- Approach / Theory of change
- Foundation health check
- Communication/branding



- Impact across generations
- Family workshops
- Family impact strategy
- Succession planning

- Formulation of statutes
- Foundation bookkeeping
- Regulatory reporting

- Donor Advised Funds
- Foundations
- Charitable trusts

- Tax considerations
- Regulatory guidance
- Jurisdictional guidance

Philanthropie im Aufwind

>USD **2** Billionen

Globales philanthropisches Kapital¹

USD **810** Milliarden

Globale Spenden UHNW Familien²

3x

Anstieg der Zahl der Kunden, die philanthropische Beratung wünschen

122

Familien weltweit im Jahr 2023 zusammengearbeitet

¹ Citi Philanthropy and the global economy 2022

² Altrata, Ultra High Net Worth Philanthropy 2024

Die am häufigsten gestellten Fragen

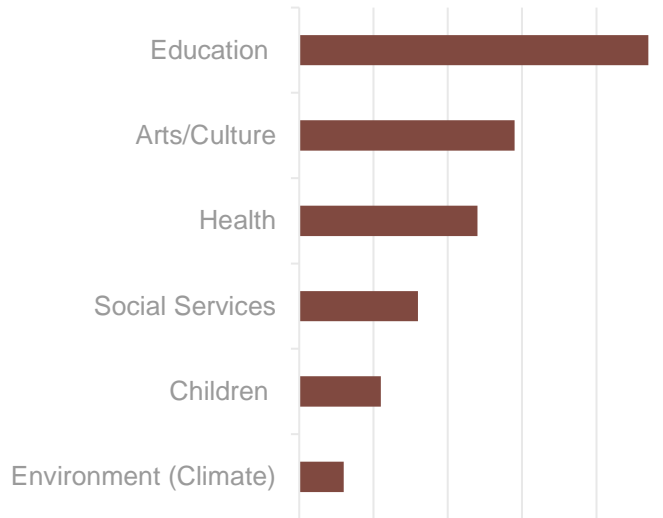
Wie agieren wir als **Familie**?

Wie können wir mit einem **unternehmerischen**
Ansatz Wirkung erzielen?

Wie **professionalisieren** wir unsere Arbeit?

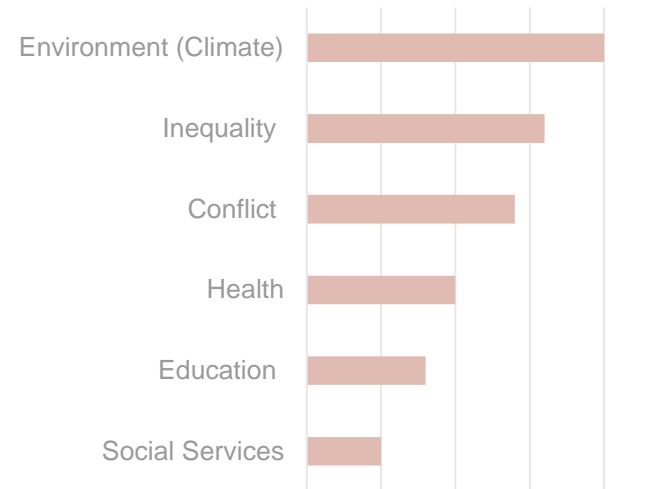
Unterschiedliche Generationen – unterschiedliche Schwerpunkte...

Top causes of UHNW philanthropists



Source: Wealth X UHNW Philanthropy 2022

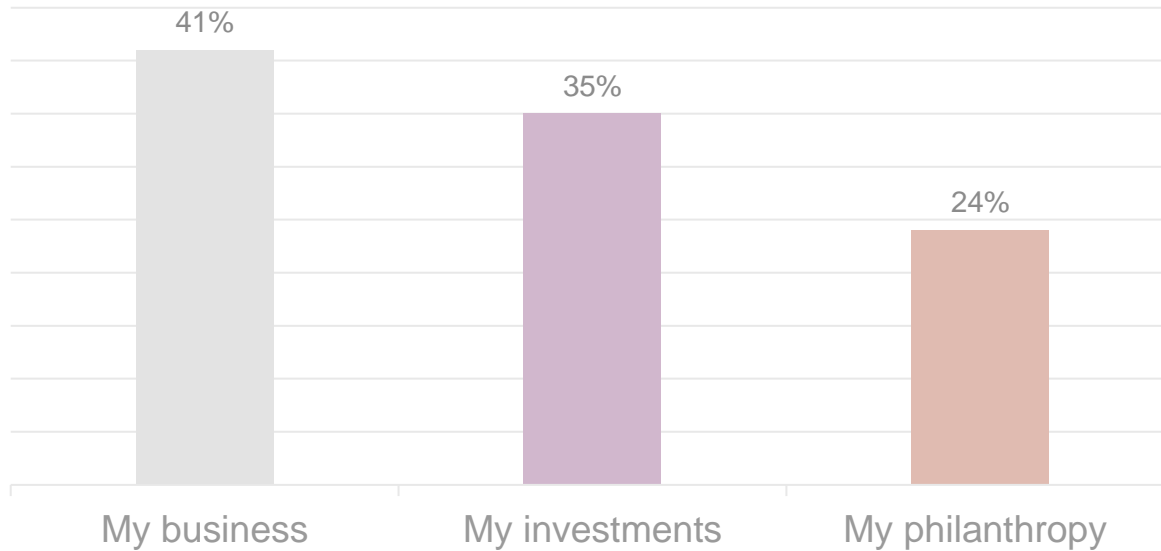
Top causes of UHNW Gen Z's



Source: Pictet Next Gen Forum survey 2021, 2022, 2023

...und unterschiedliche Herangehensweise

What are the ways you are tackling these issues



Pictet Next Gen Forum survey 2022 and 2023 consolidated

Takeaways

1

Es ist nie zu früh anzufangen.

2

Bieten Sie allen Mitgliedern die Möglichkeit, ihre eigenen Leidenschaften und Themen zu erkunden.

3

Ein Forum für offene Kommunikation und Austausch.

Marlene Engelhorns Experiment

Abo Marlene Engelhorns Experiment

Erbin lässt 50 Menschen entscheiden, was mit ihren 25 Millionen Euro geschieht

Die BASF-Erbin hat viel Geld geerbt und verschenkt den Grossteil. Wohin, berät eine bunt gemischte Gruppe. «Manche schlafen schlecht, weil es um so viel Geld geht», sagt die Projektleiterin.

Takeaways

Familie

Raum zum Erkunden
ist der Schlüssel

Unternehmerischer Ansatz

Unternehmerisches Denken
und Handeln

Professionalisierung

Rat von Experten,
Freunden und anderen

For more information

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