

STRATEGIC GIVING... NI NEEDS TO CATCH UP

Michael Graham, Director and Head of Private Client at Cleaver Fulton Rankin, since 2005.



1. What are your thoughts, in general, on charitable giving?

I think that charitable giving is hugely important and, given that the amount of state funding available has been cut across the board, it will only continue to grow in terms of its importance to society. I think that engaging with and giving to charities is of vital importance to our collective social conscience.

2. Is your giving personal or corporate or a combination of both?

Both. There are a number of charities which I support personally and at Cleaver Fulton Rankin we have always supported and acted for a large number of local and national charities. About four years ago we took the decision to allow our staff to choose a 'charity of the year' which provides a better focus for fundraising events. We have found the charity of the year initiative to be a great way of generating enthusiasm amongst our staff and have raised around £25,000 each year for our chosen charities.

3. How do you give to charity: monetarily, your own time as a volunteer or your specialist skills?

Again, I would have to say all of the above. I have been involved with a number of charities in a personal capacity over the years and presently sit on the executive

committee of Will to Give which is a local charity dedicated to promoting charitable giving by will. I have been involved with Will to Give since it began in 2009 and am very passionate about it. I also work with a number of charities and carers groups to provide information to their members about relevant issues such as wills and planning for nursing care. Will to Give is also taking part in an event for Philanthropy Fortnight on 20 April this year which is aimed at encouraging professional advisers to promote charitable giving by will.

4. What types of causes do you favour and why?

I tend to have most involvement with charities which help older people given that in my day to day work I advise my own clients in relation to wills, tax and issues of mental capacity. I tend to give most of my time to charities working in a similar area themselves, such as the Alzheimer's Society and Parkinson's UK. I sometimes think that it was no accident that I fell into this area of work since as a child I was lucky enough to know all four of my grandparents and two of my great-grandparents. That meant that I spent a lot of time in nursing homes, visiting family members. I now find that much of my work involves dealing with older people and I have always been very interested in and protective towards those clients.

5. Are there specific charities or causes that you give to regularly? How do you choose which to support?

In addition to the work we undertake annually as a firm for our Charity of the Year I also give to a number of charities that mean something to me personally. For example, I support the work of the Alzheimer's Society because of the funding that they provide for dementia research. Two of my wife's grandparents suffered from dementia and so we have seen the effects of that illness first hand. I am also a member of the National Trust and the Wildfowl & Wetlands Trust because I believe that we need to protect our local environment.

6. Do you believe that companies and individuals have a duty to help others? If yes, why?

Yes, of course. What sort of society would we live in if we only thought of ourselves?

7. What is your message to business people who may be thinking about

becoming more involved in strategic philanthropy?

It is extremely worthwhile for a whole host of reasons. Over and above the need to demonstrate good corporate social responsibility, targeted giving helps to ensure maximum benefit from the funds raised. As a firm, we have found that working with a charity closely, rather than just making a donation to it, can help create good news stories which benefit both organisations.

8. Giving Northern Ireland was set up to champion Philanthropy. Why do you think it is important that there is an organisation that helps businesses and individuals think more strategically about giving?

I think that whilst people in Northern Ireland are recognised as being amongst the most generous in the UK, we are still some way behind the rest of the country in terms of strategic giving. Having a local organisation that can help business and individuals develop a solid framework for their philanthropic activities is a real step forward.