



# Faith and Philanthropy

Maximize your philanthropic impact  
in alignment with your faith

We all want a better world. But the challenges facing us are too complex to solve alone. We must work together, combining skills and resources, to collaborate on projects with the power to create lasting change.

Working closely with our clients and their families, we recognize the important role faith plays for many in shaping values, identifying needs and helping others. It is the reason we continue to build on our experience to convene Faith and Philanthropy gatherings from various faith motivations.



Best Global Bank for Philanthropy Advice, *Euromoney* Private Banking and Wealth Management Surveys (2017 – 2022).

The *Euromoney* Private Banking and Wealth Management Surveys are based on information from Q4 of the prior year. UBS paid a license fee for use of the rating.

## The Faith and Philanthropy Community

The Faith and Philanthropy Community connects like-minded philanthropic peers motivated by the same faith and values, so that collectively you can drive social impact and innovation—and shape the future you want to see.

### What you can expect

As part of the Faith and Philanthropy Community, you have the opportunity to:

- **Attend** exclusive gatherings that explore purpose and philanthropy from various faith motivations.
- **Expand** your network by connecting with like-minded philanthropists and sharing best practices.
- **Enhance** your philanthropy skills and learn about solutions to some of the world's most pressing social problems.
- **Gain** access to vetted UBS Optimus Foundation programs that are faith-inspired or faith-based but not faith-biased.

### Part of our global philanthropy offering

Faith and Philanthropy is part of UBS Philanthropy Services, a unique and award-winning offering that partners with clients and their families to maximize their philanthropic impact. We provide comprehensive advice, insights, experiences and execution services, and employ an investment-based approach to deliver solutions to pressing social and environmental issues.

## Resources

### Insights

White paper: [Faith and Values—Motivations for Giving](#)

### Events and webinars

#### [Philanthropy & Purpose from a Christian Perspective](#)

- Featuring **Christopher Chandler**, Founder of Legatum Capital, and **Ilaria Chan**, Group Advisor on Social Impact Investments at Grab

#### [Philanthropy & Purpose from a Jewish Perspective](#)

- Featuring **David Altschuler**, co-founder of One to One Children's Fund, and **Rabbi Barry Marcus MBE**, Holocaust educator, former Rabbi of Central London Synagogue

#### [Philanthropy & Purpose from a Muslim Perspective](#)

- Featuring **Riaz Kamlani**, Executive Vice President, The Citizens Foundation, and **Imam Khalid Latif**, Chaplain at the Islamic Center at NYU

#### [Philanthropy & Purpose from a Muslim Perspective](#)

- Featuring **Noor Khan**, Program Director, The Luminos Fund, and **Rahim Thobani**, Managing Partner, RST Capital Partners

### Podcasts

#### [Episode: Philanthropy & Purpose from a Jewish Perspective](#)

- Featuring **Mark Gerson**, co-founder of the Gerson Lehrman Group and Thuzio, and Chairman of African Mission Healthcare

#### [Series: Philanthropy & Purpose from a Muslim Perspective](#)

- Four episodes with experts in the field discussing topics such as orphan care in Islam, Zakat and program eligibility, and giving trends amongst the global Muslim community

### Get in touch

Please contact your UBS Financial Advisor to learn more about how UBS Faith and Philanthropy can assist you in making a lasting difference in the world aligned with your faith.

You can also learn more by visiting our [Faith and Philanthropy website](#).

### Partners and programs

- UBS Optimus Foundation focuses on providing positive social impact for the most vulnerable populations globally. Through high-quality partners and programs, excellent social results have been achieved. While the Optimus Foundation does not select projects according to religious, ethnical or cultural criteria, several of our partners identify as faith-based, but not faith-biased, or faith-inspired. These are defined as:
  - **Faith-focused:** Organizations that are aligned with, promote and aim to grow the number of followers within a specific faith
  - **Faith-based, but not faith-biased:** Organizations that are aligned with a specific faith but serve people of all faiths, or none, without proselytization
  - **Faith-inspired:** Secular organizations founded by people with a strong faith background
- Contact us to learn more about giving opportunities and programs through the UBS Optimus Foundation that are faith-based and/or faith-inspired.

### Zakat Eligible Programs

- The UBS Optimus Foundation appreciates Zakat and its role in Islamic philanthropy. Zakat is a form of almsgiving and treated like a “wealth tax” to purify Muslims’ earnings, discourage selfishness, miserliness and provide social support to the underprivileged.
  - **The Citizens Foundation:** Supporting quality education for the least privileged in Pakistan
  - **The Luminos Fund:** New ways to give out-of-schoolchildren a second chance in Lebanon
  - **DoctorSHARE:** Bringing healthcare accessibility to the most remote communities in Indonesia
  - **Muso:** Addressing preventable deaths and lowering under-five mortality through proactive care in Mali
- To learn more, read the full [Zakat-Eligible brochure](#)

For more information on third party rating methodologies, please visit [ubs.com/us/en/designation-disclosures](https://ubs.com/us/en/designation-disclosures).

#### Important information about brokerage and advisory services.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at [ubs.com/relationshipsummary](https://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy.

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